


# **OFFICE OF COMMUNITY ALTERNATIVES**

**GEORGETOWN MARINE INSTITUTE**

**SOLICITATION # 5400007516**

	<b>State of South Carolina</b>  Request for Proposal	Solicitation Number:	5400007516
		Date Issued:	April 22, 2014
		Procurement Officer:	CHRIS MANOS
		Phone:	803-737-4917
		E-Mail Address:	<a href="mailto:CMANOS@mms.sc.gov">CMANOS@mms.sc.gov</a>

DESCRIPTION: **MARINE & WILDERNESS CAMPS FOR SCDJJ**

USING GOVERNMENTAL UNIT: **SCDJJ Administration**

*The Term "Offer" Means Your "Bid" or "Proposal". Unless submitted on-line, your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Offer" provision.*

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:	
<b>MAILING ADDRESS:</b> Materials Management Office PO Box 101103 Columbia SC 29211	<b>PHYSICAL ADDRESS:</b> Materials Management Office Capital Center 1201 Main Street, Suite 600 Columbia SC 29201

SUBMIT OFFER BY (Opening Date/Time): **05/22/2014 2:30 P.M.** (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: **04/30/2014 5:00 P.M.** (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: **See Section IV Information for Offerors to Submit on page 32**

<b>CONFERENCE TYPE: Not Applicable</b> <b>DATE &amp; TIME:</b>  (As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions)	<b>LOCATION: Not Applicable</b>
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<b>AWARD &amp; AMENDMENTS</b>	Award will be posted on <b>06/17/2014</b> . The award, this solicitation, any amendments, and any related notices will be posted at the following web address: <a href="http://www.procurement.sc.gov">http://www.procurement.sc.gov</a>
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Unless submitted on-line, you must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date. (See "Signing Your Offer" and "Electronic Signature" provisions.)

<b>NAME OF OFFEROR</b>  (full legal name of business submitting the offer)		Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.
<b>AUTHORIZED SIGNATURE</b>  (Person must be authorized to submit binding offer to contract on behalf of Offeror.)		<b>TAXPAYER IDENTIFICATION NO.</b>  (See "Taxpayer Identification Number" provision)
<b>TITLE</b>  (business title of person signing above)		<b>STATE VENDOR NO.</b>  (Register to Obtain S.C. Vendor No. at <a href="http://www.procurement.sc.gov">www.procurement.sc.gov</a> )
<b>PRINTED NAME</b>  (printed name of person signing above)	<b>DATE SIGNED</b>	<b>STATE OF INCORPORATION</b>  (If you are a corporation, identify the state of incorporation.)

<b>OFFEROR'S TYPE OF ENTITY: (Check one)</b> (See "Signing Your Offer" provision.)		
<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> Partnership	<input type="checkbox"/> Other _____
<input type="checkbox"/> Corporate entity (not tax-exempt)	<input type="checkbox"/> Corporation (tax-exempt)	<input type="checkbox"/> Government entity (federal, state, or local)

**(Return Page Two with Your Offer)**

<b>PAYMENT ADDRESS</b> (Address to which payments will be sent.) (See "Payment" clause)	<b>ORDER ADDRESS</b> (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)	<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)

## ACKNOWLEDGMENT OF AMENDMENTS

Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)
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**Preferences do not apply to Request for Proposals per SC Consolidated Procurement Code Section 11-35-1524, part (5).**



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## **I. SCOPE OF SOLICITATION**

It is the intent of the State of South Carolina, Materials Management Office (MMO) on behalf of the SC Department of Juvenile Justice (SCDJJ or DJJ) to solicit proposals to provide Community-Based Residential Services to Juvenile Offenders at the following programs: Georgetown Marine Institute, Georgetown County; Piedmont Wilderness Institute, Laurens County; Camp Bennettsville, Dillon County; Camp Sand Hills, Chesterfield County; Camp White Pines, Union County; Camp Aspen, Richland County; and Generations Alternative Program, Greenville County. This is the rebid of existing programs.

The award may be made to one offeror for each location.

### **INTRODUCTION**

The State of South Carolina Department of Juvenile Justice has been charged by the South Carolina General Assembly and the Governor, with providing a variety of community-based programs to “augment regular probation services” and to “serve as alternatives to institutionalization.” In accordance with the Youth Services Act of 1981, specifically Sections 63-19-370 and 63-19-350, Code of Laws of South Carolina, 1976, as amended, Department of Juvenile Justice is authorized to secure these services through contractor(s) who have demonstrated a unique capability and willingness to perform the type of quality of services required.

### **DEFINITIONS**

As used throughout this solicitation for proposal, the following terms will have the meaning set forth below:

- A. The term “Director” means the Director of the Department of Juvenile Justice or his/her official designee.
  - B. The term “Contracting Officer” means the person delegated by the Director of Department of Juvenile Justice to oversee the implementation of this contract.
  - C. The term “Project Monitor” means the individual designated by the Contracting Officer to serve as the liaison with the contractor(s).  
The Project Monitor is responsible for:
    - 1. Coordinating the activities of the contractor(s) with other Department of Juvenile Justice funded projects; and
    - 2. Such other specific responsibilities as are stipulated in various clauses of the contract. The Project Monitor is not authorized to make any commitments or otherwise obligate the Department of Juvenile Justice or authorize any changes to the contract, which affects the contract price, terms, or conditions. Any such changes will be referred through the Project Monitor to the Director of Procurement. No such changes will be made without the expressed prior authorization of the Director of Procurement Services.
  - G. The term “Quality Assurance Monitor” means the individual(s) designated by the Director of the Department of Juvenile Justice to ensure that the requirements of the contract are being implemented as required. This includes, but is not limited to State Standards for Residential Services, Education, and Facility Standards. The Quality Assurance Monitors conducts reviews, outlines required corrective action, and follows up to ensure that corrective action is implemented.
  - H. The term “client” means any juvenile who is under the supervision of Department of Juvenile Justice and who has been referred to the contractor(s).
  - I. The term “juvenile” means service recipients in these residential programs.
  - J. The term “slot” means one juvenile enrollment in the contractor’s program.
- The term “Materials Management Office” or “MMO” means the State of South Carolina Office of General Services, Materials Management Office.

**ACQUIRE SERVICES (JAN 2006)**

The purpose of this solicitation is to acquire services complying with the enclosed description and/or specifications and conditions. [01-1010-1]

**MAXIMUM CONTRACT PERIOD - ESTIMATED (Jan 2006)**

Start date: 08/01/2014 End date: 07/31/2019. Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award. See clause entitled "Term of Contract - Effective Date/Initial Contract Period". [01-1040-1]

## **II. INSTRUCTIONS TO OFFERORS - A. GENERAL INSTRUCTIONS**

### **DEFINITIONS (JAN 2006)**

EXCEPT AS OTHERWISE PROVIDED HEREIN, THE FOLLOWING DEFINITIONS ARE APPLICABLE TO ALL PARTS OF THE SOLICITATION.

AMENDMENT means a document issued to supplement the original solicitation document.

BOARD means the South Carolina Budget & Control Board.

BUYER means the Procurement Officer.

CHANGE ORDER means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual agreement of the parties to the contract.

CONTRACT See clause entitled Contract Documents & Order of Precedence.

CONTRACT MODIFICATION means a written order signed by the Procurement Officer, directing the contractor to make changes which the changes clause of the contract authorizes the Procurement Officer to order without the consent of the contractor.

CONTRACTOR means the Offeror receiving an award as a result of this solicitation.

COVER PAGE means the top page of the original solicitation on which the solicitation is identified by number. Offerors are cautioned that Amendments may modify information provided on the Cover Page.

OFFER means the bid or proposal submitted in response this solicitation. The terms Bid and Proposal are used interchangeably with the term Offer.

OFFEROR means the single legal entity submitting the offer. The term Bidder is used interchangeably with the term Offeror. See bidding provisions entitled Signing Your Offer and Bid/Proposal As Offer To Contract.

ORDERING ENTITY Using Governmental Unit that has submitted a Purchase Order.

PAGE TWO means the second page of the original solicitation, which is labeled Page Two.

PROCUREMENT OFFICER means the person, or his successor, identified as such on the Cover Page.

YOU and YOUR means Offeror.

SOLICITATION means this document, including all its parts, attachments, and any Amendments.

STATE means the Using Governmental Unit(s) identified on the Cover Page.

SUBCONTRACTOR means any person having a contract to perform work or render service to Contractor as a part of the Contractor's agreement arising from this solicitation.

USING GOVERNMENTAL UNIT means the unit(s) of government identified as such on the Cover Page. If the Cover Page names a Statewide Term Contract as the Using Governmental Unit, the Solicitation seeks to establish a Term Contract [11-35-310(35)] open for use by all South Carolina Public Procurement Units [11-35-4610(5)].

WORK means all labor, materials, equipment and services provided or to be provided by the Contractor to fulfill the Contractor's obligations under the Contract. [02-2A003-1]

### **AMENDMENTS TO SOLICITATION (JAN 2004)**

(a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: [www.procurement.sc.gov](http://www.procurement.sc.gov) (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged. [02-2A005-1]

### **AWARD NOTIFICATION (NOV 2007)**

Notice regarding any award or cancellation of award will be posted at the location specified on the Cover Page. If the contract resulting from this Solicitation has a total or potential value of fifty thousand dollars or more, such notice will be sent to all Offerors responding to the Solicitation. Should the contract resulting from this Solicitation have a total or potential value of one hundred thousand dollars or more, such notice will be sent to all Offerors responding to the Solicitation and any award will not be effective until the eleventh day after such notice is given. [02-2A010-1]

### **BID/PROPOSAL AS OFFER TO CONTRACT (JAN 2004)**

By submitting Your Bid or Proposal, You are offering to enter into a contract with the Using Governmental Unit(s). Without further action by either party, a binding contract shall result upon final award. Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror on the Cover Page. An Offer may be submitted by

only one legal entity; "joint bids" are not allowed. [02-2A015-1]

**BID ACCEPTANCE PERIOD (JAN 2004)**

In order to withdraw Your Offer after the minimum period specified on the Cover Page, You must notify the Procurement Officer in writing. [02-2A020-1]

**BID IN ENGLISH and DOLLARS (JAN 2004)**

Offers submitted in response to this solicitation shall be in the English language and in US dollars, unless otherwise permitted by the Solicitation. [02-2A025-1]

**BOARD AS PROCUREMENT AGENT (JAN 2004)**

(a) Authorized Agent. All authority regarding the conduct of this procurement is vested solely with the responsible Procurement Officer. Unless specifically delegated in writing, the Procurement Officer is the only government official authorized to bind the government with regard to this procurement. (b) Purchasing Liability. The Procurement Officer is an employee of the Board acting on behalf of the Using Governmental Unit(s) pursuant to the Consolidated Procurement Code. Any contracts awarded as a result of this procurement are between the Contractor and the Using Governmental Units(s). The Board is not a party to such contracts, unless and to the extent that the board is a using governmental unit, and bears no liability for any party's losses arising out of or relating in any way to the contract. [02-2A030-1]

**CERTIFICATE OF INDEPENDENT PRICE DETERMINATION (MAY 2008)**

**GIVING FALSE, MISLEADING, OR INCOMPLETE INFORMATION ON THIS CERTIFICATION MAY RENDER YOU SUBJECT TO PROSECUTION UNDER SECTION 16-9-10 OF THE SOUTH CAROLINA CODE OF LAWS AND OTHER APPLICABLE LAWS.**

(a) By submitting an offer, the offeror certifies that-

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-

(i) Those prices;

(ii) The intention to submit an offer; or

(iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory-

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this certification; or

(2)(i) Has been authorized, in writing, to act as agent for the offeror's principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this certification [As used in this subdivision (b)(2)(i), the term "principals" means the person(s) in the offeror's organization responsible for determining the prices offered in this bid or proposal];

(ii) As an authorized agent, does certify that the principals referenced in subdivision (b)(2)(i) of this certification have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this certification; and

(iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this certification.

(c) If the offeror deletes or modifies paragraph (a)(2) of this certification, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure. [02-2A032-1]

## **CERTIFICATION REGARDING DEBARMENT AND OTHER RESPONSIBILITY MATTERS (JAN 2004)**

(a) (1) By submitting an Offer, Offeror certifies, to the best of its knowledge and belief, that-

(i) Offeror and/or any of its Principals-

(A) Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any state or federal agency;

(B) Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

(C) Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.

(ii) Offeror has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any public (Federal, state, or local) entity.

(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

(b) Offeror shall provide immediate written notice to the Procurement Officer if, at any time prior to contract award, Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) If Offeror is unable to certify the representations stated in paragraphs (a)(1), Offer must submit a written explanation regarding its inability to make the certification. The certification will be considered in connection with a review of the Offeror's responsibility. Failure of the Offeror to furnish additional information as requested by the Procurement Officer may render the Offeror nonresponsive.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly or in bad faith rendered an erroneous certification, in addition to other remedies available to the State, the Procurement Officer may terminate the contract resulting from this solicitation for default. [02-2A035-1]

## **CODE OF LAWS AVAILABLE (JAN 2006)**

The South Carolina Code of Laws, including the Consolidated Procurement Code, is available at:  
<http://www.scstatehouse.gov/code/statmast.php>

The South Carolina Regulations are available at:  
<http://www.scstatehouse.gov/coderegs/statmast.php>  
[02-2A040-2]

## **COMPLETION OF FORMS/CORRECTION OF ERRORS (JAN 2006)**

All prices and notations should be printed in ink or typewritten. Errors should be crossed out, corrections entered and initialed by the person signing the bid. Do not modify the solicitation document itself (including bid schedule). (Applicable only to offers submitted on paper.) [02-2A045-1]

## **DISCLOSURE OF CONFLICTS OF INTEREST OR UNFAIR COMPETITIVE ADVANTAGE (MAY 2011)**

You warrant and represent that your offer identifies and explains any unfair competitive advantage you may have in competing for the proposed contract and any actual or potential conflicts of interest that may arise from your participation in this competition or your receipt of an award. The two underlying principles are (a) preventing the existence of conflicting roles that might bias a contractor's judgment, and (b) preventing an unfair competitive advantage. If you have an unfair competitive advantage or a conflict of interest, the state may withhold award. Before withholding award on these grounds, an offeror will be notified of the concerns and provided a reasonable opportunity to respond. Efforts to avoid or mitigate such concerns, including restrictions on future activities, may be considered. [02-2A047-1]

## **DEADLINE FOR SUBMISSION OF OFFER (JAN 2004)**

Any offer received after the Procurement Officer of the governmental body or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies mail room which services that purchasing office prior to the bid opening. [R.19-445.2070(H)] [02-2A050-1]

## **DRUG FREE WORK PLACE CERTIFICATION (JAN 2004)**

By submitting an Offer, Contractor certifies that, if awarded a contract, Contractor will comply with all applicable provisions of The Drug-free Workplace Act, Title 44, Chapter 107 of the South Carolina Code of Laws, as amended. [02-2A065-1]

## **DUTY TO INQUIRE (JAN 2006)**

Offeror, by submitting an Offer, represents that it has read and understands the Solicitation and that its Offer is made in compliance with the Solicitation. Offerors are expected to examine the Solicitation thoroughly and should request an explanation of any ambiguities, discrepancies, errors, omissions, or conflicting statements in the Solicitation. Failure to do so will be at the Offeror's risk. Offeror assumes responsibility for any patent ambiguity in the Solicitation that Offeror does not bring to the State's attention. [02-2A070-1]

## **ETHICS CERTIFICATE (MAY 2008)**

By submitting an offer, the offeror certifies that the offeror has and will comply with, and has not, and will not, induce a person to violate Title 8, Chapter 13 of the South Carolina Code of Laws, as amended (ethics act). The following statutes require special attention: Section 8-13-700, regarding use of official position for financial gain; Section 8-13-705, regarding gifts to influence action of public official; Section 8-13-720, regarding offering money for advice or assistance of public official; Sections 8-13-755 and 8-13-760, regarding restrictions on employment by former public official; Section 8-13-775, prohibiting public official with economic interests from acting on contracts; Section 8-13-790, regarding recovery of kickbacks; Section 8-13-1150, regarding statements to be filed by consultants; and Section 8-13-1342, regarding restrictions on contributions by contractor to candidate who participated in awarding of contract. The state may rescind any contract and recover all amounts expended as a result of any action taken in violation of this provision. If contractor participates, directly or indirectly, in the evaluation or award of public contracts, including without limitation, change orders or task orders regarding a public contract, contractor shall, if required by law to file such a statement, provide the statement required by Section 8-13-1150 to the procurement officer at the same time the law requires the statement to be filed. [02-2A075-2]

## **OMIT TAXES FROM PRICE (JAN 2004)**

Do not include any sales or use taxes in Your price that the State may be required to pay. [02-2A080-1]

## **PROTESTS (JUNE 2006)**

Any prospective bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the solicitation of a contract shall protest within fifteen days of the date of issuance of the applicable solicitation document at issue. Any actual bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the intended award or award of a contract shall protest within ten days of the date notification of award is posted in accordance with this code. A protest shall be in writing, shall set forth the grounds of the protest and the relief requested with enough particularity to give notice of the issues to be decided, and must be received by the appropriate Chief Procurement Officer within the time provided. See clause entitled "Protest-CPO". [Section 11-35-4210] [02-2A085-1]

## **PUBLIC OPENING (JAN 2004)**

Offers will be publicly opened at the date/time and at the location identified on the Cover Page, or last Amendment, whichever is applicable. [02-2A090-1]

## **QUESTIONS FROM OFFERORS (JAN 2004)**

(a) Any prospective offeror desiring an explanation or interpretation of the solicitation, drawings, specifications, etc., must request it in writing. Questions must be received by the Procurement Officer no later than five (5) days prior to opening unless otherwise stated on the Cover Page. Label any communication regarding your questions with the name of the procurement officer, and the solicitation's title and number. Oral explanations or instructions will not be binding. Any information given a prospective offeror concerning a solicitation will be furnished promptly to all other prospective offerors as an Amendment to the solicitation, if that information is necessary for submitting offers or if the lack of it would be prejudicial to other prospective offerors. (b) The State seeks to permit maximum practicable competition. Offerors are urged to advise the Procurement Officer -- as soon as possible -- regarding any aspect of this procurement, including any aspect of the Solicitation, that unnecessarily or inappropriately limits full and open competition. [02-2A095-1]

All questions must be submitted in writing and received by Chris Manos no later than **5:00 P.M., April 30, 2014**. Email is the preferred method for submitting questions with **'Questions: MARINE & WILDERNESS CAMPS FOR SCDJJ'** as the subject of the email. Questions should be submitted within the body of the email. Email: [cmanos@mmo.sc.gov](mailto:cmanos@mmo.sc.gov)

## **REJECTION/CANCELLATION (JAN 2004)**

The State may cancel this solicitation in whole or in part. The State may reject any or all proposals in whole or in part. [SC Code Section 11-35-1710 & R.19-445.2065] [02-2A100-1]

## **RESPONSIVENESS/IMPROPER OFFERS (JAN 2004)**

(a) Bid as Specified. Offers for supplies or services other than those specified will not be considered unless authorized by the Solicitation.

(b) Multiple Offers. Offerors may submit more than one Offer, provided that each Offer has significant differences other than price. Each separate Offer must satisfy all Solicitation requirements. If this solicitation is an Invitation for Bids, each separate offer must be submitted as a separate document. If this solicitation is a Request for Proposals, multiple offers may be submitted as one document, provided that you clearly differentiate between each offer and you submit a separate cost proposal for each offer, if applicable.

(c) Responsiveness. Any Offer which fails to conform to the material requirements of the Solicitation may be rejected as nonresponsive. Offers which impose conditions that modify material requirements of the Solicitation may be rejected. If a fixed price is required, an Offer will be rejected if the total possible cost to the State cannot be determined. Offerors will not be given an opportunity to correct any material nonconformity. Any deficiency resulting from a minor informality may be cured or waived at the sole discretion of the Procurement Officer. [R.19-445.2070 and Section 11-35-1520(13)]

(d) Price Reasonableness: Any offer may be rejected if the Procurement Officer determines in writing that it is unreasonable as to price. [R. 19-445.2070].

(e) Unbalanced Bidding. The State may reject an Offer as nonresponsive if the prices bid are materially unbalanced between line items or subline items. A bid is materially unbalanced when it is based on prices significantly less than cost for some work and prices which are significantly overstated in relation to cost for other work, and if there is a reasonable doubt that the bid will result in the lowest overall cost to the State even though it may be the low evaluated bid, or if it is so unbalanced as to be tantamount to allowing an advance payment. [02-2A105-1]

## RESTRICTIONS APPLICABLE TO OFFERORS (JAN 2004)

Violation of these restrictions may result in disqualification of your offer, suspension or debarment, and may constitute a violation of the state Ethics Act. (a) After issuance of the solicitation, *you agree not to discuss this procurement activity in any way with the Using Governmental Unit or its employees, agents or officials*. All communications must be solely with the Procurement Officer. This restriction may be lifted by express written permission from the Procurement Officer. This restriction expires once a contract has been formed. (b) Unless otherwise approved in writing by the Procurement Officer, *you agree not to give anything to any Using Governmental Unit or its employees, agents or officials prior to award*. [02-2A110-1]

## SIGNING YOUR OFFER (JAN 2004)

Every Offer must be signed by an individual with actual authority to bind the Offeror. (a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm. (b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words by its Partner, and signed by a general partner. (c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign. (d) An Offer may be submitted by a joint venturer involving any combination of individuals, partnerships, or corporations. If the Offeror is a joint venture, the Offer must be submitted in the name of the Joint Venture and signed by every participant in the joint venture in the manner prescribed in paragraphs (a) through (c) above for each type of participant. (e) If an Offer is signed by an agent, other than as stated in subparagraphs (a) through (d) above, the Offer must state that it has been signed by an Agent. Upon request, Offeror must provide proof of the agent's authorization to bind the principal. [02-2A115-1]

## STATE OFFICE CLOSINGS (JAN 2004)

If an emergency or unanticipated event interrupts normal government processes so that offers cannot be received at the government office designated for receipt of bids by the exact time specified in the solicitation, the time specified for receipt of offers will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal government processes resume. In lieu of an automatic extension, an Amendment may be issued to reschedule bid opening. If state offices are closed at the time a pre-bid or pre-proposal conference is scheduled, an Amendment will be issued to reschedule the conference. Useful information may be available at:

<http://scemd.org/index.php/departments/response/severe-winter-weather>  
[02-2A120-2]

## SUBMITTING CONFIDENTIAL INFORMATION (AUG 2002)

(An overview is available at [www.procurement.sc.gov](http://www.procurement.sc.gov)) For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that Offeror contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the words "TRADE SECRET" every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "PROTECTED" every page, or portion thereof, that Offeror contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response (bid, proposal, quote, etc.) as confidential, trade secret, or protected. If your response, or any part thereof, is improperly marked as confidential or trade secret or protected, the State may, in its sole discretion, determine it nonresponsive. If only portions of a page are subject to some protection, do not mark the entire page. By submitting a response to this solicitation or request, Offeror (1) agrees to the public disclosure of every page of every document regarding this solicitation or request that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED", (2) agrees that any information not marked, as required by these bidding instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure. In determining whether to release documents, the State will detrimentally rely on Offeror's

marking of documents, as required by these bidding instructions, as being either "Confidential" or "Trade Secret" or "PROTECTED". By submitting a response, Offeror agrees to defend, indemnify and hold harmless the State of South Carolina, its officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from the State withholding information that Offeror marked as "confidential" or "trade secret" or "PROTECTED". (All references to S.C. Code of Laws.) [02-2A125-1]

#### **SUBMITTING YOUR OFFER OR MODIFICATION (JAN 2004)**

(a) Offers and offer modifications shall be submitted in sealed envelopes or packages (unless submitted by electronic means) - (1) Addressed to the office specified in the Solicitation; and (2) Showing the time and date specified for opening, the solicitation number, and the name and address of the bidder. (b) If you are responding to more than one solicitation, each offer must be submitted in a different envelope or package. (c) Each Offeror must submit the number of copies indicated on the Cover Page. (d) Offerors using commercial carrier services shall ensure that the Offer is addressed and marked on the outermost envelope or wrapper as prescribed in paragraphs (a)(1) and (2) of this provision when delivered to the office specified in the Solicitation. (e) Facsimile or e-mail offers, modifications, or withdrawals, will not be considered unless authorized by the Solicitation. (f) Offers submitted by electronic commerce shall be considered only if the electronic commerce method was specifically stipulated or permitted by the solicitation. [02-2A130-1]

#### **TAX CREDIT FOR SUBCONTRACTING WITH DISADVANTAGED SMALL BUSINESSES (JAN 2008)**

Pursuant to Section 12-6-3350, a taxpayer having a contract with this State who subcontracts with a socially and economically disadvantaged small business is eligible for an income tax credit equal to four percent of the payments to that subcontractor for work pursuant to the contract. The subcontractor must be certified as a socially and economically disadvantaged small business as defined in Section 11-35-5010 and regulations pursuant to it. The credit is limited to a maximum of fifty thousand dollars annually. A taxpayer is eligible to claim the credit for ten consecutive taxable years beginning with the taxable year in which the first payment is made to the subcontractor that qualifies for the credit. After the above ten consecutive taxable years, the taxpayer is no longer eligible for the credit. A taxpayer claiming the credit shall maintain evidence of work performed for the contract by the subcontractor. The credit may be claimed on Form TC-2, "Minority Business Credit." A copy of the subcontractor's certificate from the Governor's Office of Small and Minority Business (OSMBA) is to be attached to the contractor's income tax return. Questions regarding the tax credit and how to file are to be referred to: SC Department of Revenue, Research and Review, Phone: (803) 898-5786, Fax: (803) 898-5888. Questions regarding subcontractor certification are to be referred to: Governor's Office of Small and Minority Business Assistance, Phone: (803) 734-0657, Fax: (803) 734-2498. [02-2A135-1]

#### **TAXPAYER IDENTIFICATION NUMBER (JAN 2004)**

(a) If Offeror is owned or controlled by a common parent as defined in paragraph (b) of this provision, Offeror shall submit with its Offer the name and TIN of common parent.  
(b) Definitions: "Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member. "Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number.  
(c) If Offeror does not have a TIN, Offeror shall indicate if either a TIN has been applied for or a TIN is not required. If a TIN is not required, indicate whether (i) Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; (ii) Offeror is an agency or instrumentality of a state or local government; (iii) Offeror is an agency or instrumentality of a foreign government; or (iv) Offeror is an agency or instrumentality of the Federal Government. [02-2A140-1]

#### **VENDOR REGISTRATION MANDATORY (JAN 2006)**

You must have a state vendor number to be eligible to submit an offer. To obtain a state vendor number, visit [www.procurement.sc.gov](http://www.procurement.sc.gov) and select New Vendor Registration. (To determine if your business is already registered, go to "Vendor Search"). Upon registration, you will be assigned a state vendor number. Vendors must keep their vendor information current. If you are already registered, you can update your information by selecting Change Vendor Registration. (Please note that vendor registration does not substitute for any obligation to register with the S.C. Secretary of State or S.C. Department of Revenue. You can register with the agencies at <http://www.scbos.com/default.htm>) [02-2A145-1]

## **WITHDRAWAL OR CORRECTION OF OFFER (JAN 2004)**

Offers may be withdrawn by written notice received at any time before the exact time set for opening. If the Solicitation authorizes facsimile offers, offers may be withdrawn via facsimile received at any time before the exact time set for opening. A bid may be withdrawn in person by a bidder or its authorized representative if, before the exact time set for opening, the identity of the person requesting withdrawal is established and the person signs a receipt for the bid. The withdrawal and correction of Offers is governed by S.C. Code Section 11-35-1520 and Regulation 19-445.2085. [02-2A150-1]

## II. INSTRUCTIONS TO OFFERORS -- B. SPECIAL INSTRUCTIONS

### CONTENTS OF OFFER (RFP) -- SPO (JAN 2006)

- (a) Offers should be complete and carefully worded and should convey all of the information requested.
  - (b) Offers should be prepared simply and economically, providing a straightforward, concise description of offeror's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
  - (c) Each copy of your offer should be bound in a single volume where practical. All documentation submitted with your offer should be bound in that single volume.
  - (d) If your offer includes any comment over and above the specific information requested in the solicitation, you are to include this information as a separate appendix to your offer. Offers which include either modifications to any of the solicitation's contractual requirements or an offeror's standard terms and conditions may be deemed non-responsive and not considered for award.
- [02-2B040-1]

### CLARIFICATION (NOV 2007)

Pursuant to Section 11-35-1520(8), the Procurement Officer may elect to communicate with you after opening for the purpose of clarifying either your offer or the requirements of the solicitation. Such communications may be conducted only with offerors who have submitted an offer which obviously conforms in all material aspects to the solicitation. Clarification of an offer must be documented in writing and included with the offer. Clarifications may not be used to revise an offer or the solicitation. [Section 11-35-1520(8); R.19-445.2080] [02-2B055-1]

### DISCUSSIONS and NEGOTIATIONS (NOV 2007)

Submit your best terms from a cost or price and from a technical standpoint. Your proposal may be evaluated and your offer accepted without any discussions, negotiations, or prior notice. Ordinarily, nonresponsive proposals will be rejected outright. Nevertheless, the State may elect to conduct discussions, including the possibility of limited proposal revisions, but only for those proposals reasonably susceptible of being selected for award. If improper revisions are submitted, the State may elect to consider only your unrevised initial proposal. [11-35-1530(6); R.19-445.2095(I)] The State may also elect to conduct negotiations, beginning with the highest ranked offeror, or seek best and final offers, as provided in Section 11-35-1530(8). If negotiations are conducted, the State may elect to disregard the negotiations and accept your original proposal. [02-2B060-1]

### MAGNETIC MEDIA – REQUIRED FORMAT (MODIFIED)

Your original offer must be accompanied by one copy in the following electronic format: compact disk (CD) in one of the following formats: CD-R; DVD ROM; DVD-R; or DVD+R. Formats such as CD-RW, DVD-RAM, DVD-RW, DVD+RW, or DVIX are not acceptable and will result in the Offeror's proposal being rejected. Every CD must be labeled with offeror's name, solicitation number, and specify whether contents address technical proposal or business proposal. If multiple CD sets are provided, each CD in the set must be appropriately identified as to its relationship to the set, e.g., 1 of 2. Each CD must be identical to your original offer. File format shall be MS Word 97 or later, or Portable Document Format (.pdf) as one document is preferred. Magnetic Media must be readily accessible to copy or print by MMO.

### SUBMITTING REDACTED OFFERS (MODIFIED)

You are required to mark your original offer to identify any information that is exempt from public disclosure. You must do so in accordance with the clause entitled "Submitting Confidential Information." You must also submit one complete copy of your offer from which you have removed any information that you marked as exempt, i.e., a redacted copy. The information redacted should mirror in every detail the information marked as exempt from public disclosure. The redacted copy should: (i) reflect the same pagination as the original, (ii) show the empty space from which information was redacted, and (iii) be submitted on magnetic media. (See clause entitled "Magnetic Media Required Format") Except for the redacted information, the CD must be identical to the original offer. Portable Document Format (.pdf) as one document is preferred. Redacted copy must be readily accessible to copy, print or distribute by MMO. You are required to submit a Redacted Copy even if you have no information that is exempt from public disclosure unless the USB drive content is easily noted "Both Magnetic Media and Redacted Copy" or your CD is labeled "Both Magnetic Media and Redacted Copy."

### **MAIL PICKUP (JAN 2006)**

The State Procurement Office picks up all mail from The US Postal Service once daily around 8:30 a.m. (excluding weekends and holidays). See provision entitled Deadline for Submission of Offer. [02-2B080-1]

### **OPENING PROPOSALS -- PRICES NOT DIVULGED (JAN 2006)**

In competitive sealed proposals, prices will not be divulged at opening. [Section 11-35-1530 & R. 19-445.2095(c) (1)] [02-2B110-1]

### **PROTEST - CPO - MMO ADDRESS (JUNE 2006)**

Any protest must be addressed to the Chief Procurement Officer, Materials Management Office, and submitted in writing

(a) by email to [protest-mmo@mmo.sc.gov](mailto:protest-mmo@mmo.sc.gov) ,

(b) by facsimile at 803-737-0639 , or

(c) by post or delivery to 1201 Main Street, Suite 600, Columbia, SC 29201. [02-2B122-1]

### **SITE VISIT -- BY APPOINTMENT (JAN 2006)**

Appointment for a site visit may be made by contacting: Ms. Nancy Kuhl at 803-896-9353 [02-2B140-1]

Note: Site visits must be completed by April 30, 2014 in order to submit written questions pertaining to the site visit. Anything verbally said during a site visit is not a binding contract term. If you want a definitive answer to a question raised during a site visit, the question must be in writing to the Procurement Officer. (see Section II, Questions from Offerors on page 9).

### III. SCOPE OF WORK/SPECIFICATIONS

#### DELIVERY/PERFORMANCE LOCATION -- SPECIFIED (JAN 2006)

After award, all deliveries shall be made and all services provided to the following address, unless otherwise specified:

South Carolina Department of Juvenile Justice  
1711 Shivers Road  
Columbia, SC 29221

[03-3030-1]

#### SERVICES

The contractor(s) will provide community-based residential services to juvenile offenders at the residential programs. Public and private organizations are eligible to apply. Juveniles served will be on probation, parole or transfer status.

All necessary staffing, programs, and services will be required to serve these juveniles 24 hours a day, seven days a week. Programming will include individualized services as well as educational and vocational services. All facilities must meet requirements for licensure by the South Carolina Department of Social Services. Relicensing is mandatory in accordance with procedures and requirements of the Department of Social Services.

#### PROGRAM DESCRIPTION

The contractor(s) will provide community-based residential services for juveniles under the supervision of the Department of Juvenile Justice. As services are developed, and on a continuing basis, the program profiles needed to serve these juveniles must be assessed and reassessed to ensure that programs available meet the needs of the current population.

For this reason, it is necessary that the successful contractor(s) be flexible in approach and willing to design or redesign their program based on the needs of the current population. The contractor(s) must address the need for flexibility in programming and work with the Department of Juvenile Justice to address or readdress specific program components and modify population variables when required by SCDJJ.

Group home and educational services will be provided. Family involvement and family based intervention is required and reunification with the family should be achieved at the earliest possible date. Outdoor experiential programming is encouraged; however, it should not be a mandatory program component. Preparation for employment should be a primary focus of the program.

Service components will include all requirements included in the State Standards for Residential Services (*Attachment 1*). Care plan goals will be designed to be attainable within the length of stay designated by the Juvenile Parole Board or the SCDJJ Staffing participants. Recommendations will be provided to the juvenile's Probation Officer for aftercare services.

## **A. Description of Juveniles to be Served**

**Georgetown Marine Institute (GMI):** GMI will serve male juvenile offenders between 11 to 17 years of age. Programming will meet or exceed all requirements for Group Care Intermediate Services (34 beds).

**Piedmont Wilderness Institute (PWI):** PWI will serve male juvenile offenders between 14 to 18 years of age. Programming will meet or exceed all requirements for Group Care Intermediate Services (34 beds).

**Camp Bennettsville (CB):** CB will serve male juvenile offenders between 14 to 21 years of age. Programming will meet or exceed all requirements for Group Care Intermediate Services (40 beds).

The Contractor will maintain licensing for 80 beds, 40 on each side of the property (Camps 1 and 2). The Camp will have use of all buildings on the property and responsibility for all of the property and maintenance for these two 40 bed facilities.

**Camp Sand Hills (CSH):** CSH will serve male juveniles offenders between 14 to 21 years of age. Programming will meet or exceed all requirements for Group Care Intermediate Services (40 beds). The Contractor will maintain licensing for 48 beds.

**Camp White Pine (CWP):** CWP will serve male juveniles offenders between 12 to 17 years of age. Programming will meet or exceed all requirements for Group Care Intermediate Services (40 beds).

The Contractor will maintain licensing for 80 beds, 40 on each side of the property (Camps 1 & 2). The Camp will have use of all buildings on the property and responsibility for the property and maintenance for these two 40 bed facilities.

**Camp Aspen (CA):** CA will serve male juvenile offenders between 12 to 19 years of age. Programming will meet all requirements for Group Care Intermediate Services (36 beds).

**Specialized Requirements for Camp Aspen:** In order to meet the needs of the juvenile population, the services at Camp Aspen should be directed at meeting the needs of juveniles whose services should focus on rehabilitative efforts in the area of substance abuse services. Staff credentials and service requirements shall be enhanced.

### **1. Staffing**

- a. Staff will include three Human Services Professionals who have obtained a masters degree in the behavioral sciences and experience in the provision of substance abuse services.
- b. These Human Services Professionals will be Certified Addictions Counselors (CAC's) or will be working toward certification.

### **2. Services**

- a. The program components will be defined. The curriculum and services offered will be recognized as best practice models with respect to substance abuse rehabilitation by professionals as identified by the Department of Juvenile Justice.
- b. Programming should take into account the developmental level of adolescents and should include both psycho-educational and cognitive-behavioral group formats.
- c. Programming should include family involvement with an eye toward family and community re-integration.

- d. Juveniles should receive a minimum of three group sessions per week, which are conducted by a Masters Level therapist with no more than 12 juveniles participating in each group session.
- e. Non-clinical staff should receive training in normal adolescent development and basic substance abuse theory in order to play an integrated role in the program.
- f. Utilization of external support groups such as Alateen is encouraged.

### 3. Aftercare Planning

- a. Aftercare planning will be initiated for each juvenile upon his arrival, and contact will be made with service providers in the juvenile's home county (e.g., The Bridge or local Commission) to ensure continuity of services from the program to the community.
- b. Compliance with aftercare services should be strongly supported and encouraged.

**Generations Alternative Program:** Generations will serve male juvenile offenders between 12 to 21 years of age. Programming will be designed for sex offenders and will meet all requirements for Group Home Intensive (10 beds) and Group Home Intermediate (16 beds) Services. Specialized Services will be offered for Sexual Offenders. (Exception for Generations: Education is provided on-site by the local school district.)

#### **Applicable to all Programs**

The ages of juveniles served in all programs may be modified by SCDJJ based on the needs of their clients. If necessary, requests for the modification of ages on the DSS license may be submitted by the Contractor to DSS. At any given time, the DSS license may have a broader span of approval than the juveniles actually referred by SCDJJ. At all times, programs must not serve children who are older or younger than the ages noted on the DSS license.

Juveniles in all programs on transfer status are not allowed to earn home visits, but can and must be allowed family contact in preparation for reunification. The contractor(s) will have input regarding admissions; however, after case staffings, juveniles must be accepted on a "no-reject" basis. Pertinent documents will be provided for review prior to the acceptance date.

Average length of stay at all programs is based on the juvenile offender's profile. Estimated length of stay will be provided for each juvenile on a staffing form included in the admission's packet.

### **B. Facilities**

The contractor(s) will operate these programs at a site owned or leased by SCDJJ and in facilities owned by SCDJJ. A tour is available on request.

The contractor(s) must develop and implement a maintenance program, which includes the grounds, equipment, and buildings of the facility, and which assures the facility will be maintained in a good state of repair and maintenance. The contractor(s) must also assume liability for all maintenance costs. The contractor(s) must maintain facilities and equipment utilized to provide services in a lawful, humane, safe and sanitary manner.

The contractor(s) will be responsible for any damage to or loss of the same resulting from negligence by the contractor(s). Maintenance and replacement of equipment and supplies is the sole responsibility of the contractor(s).

The contractor(s) will maintain facilities and equipment utilized to provide services under this contract in good operating condition. Generally, equipment and facilities which are in good repair, are reliable, and are efficiently and effectively performing the functions for which intended, are not causing other problems will be considered to be in good operating condition. (e.g., HVAC equipment provides proper heating and cooling; water heater provides hot water; doors and windows open and close properly; etc.) For additional details, please refer to Wilderness Camp Maintenance and Replacement Guide for SCDJJ (*Attachment 2*)

All facilities must be in compliance with all Federal, State and local codes and regulations applicable to the construction of a group home facility to house juvenile offenders. The facility must meet all requirements for licensure by the Department of Social Services. All facilities must meet State and local building and fire codes. The contractor(s) will have a certificate of occupancy from the State Fire Marshal's Office. Facilities utilized for educational purposes must meet the provisions of the State Department of Education.

Contractors, who are under the auspices of the SCDJJ School District, will provide all Information Technology requirements necessary for classroom environment. This would include high speed Internet connection consistent with the bandwidth equal to or greater than that supplied to SCDJJ managed sites. Classrooms and labs should be wired or maintain **secured** wireless capability to deliver Internet services to workstations and other devices. Students should be provided with equipment, software and applications consistent with that provided to students in SCDJJ managed classrooms. Video conferencing equipment will be provided by SCDJJ and such equipment will remain the property of SCDJJ. Contractor must take all normal precautions to protect SCDJJ's equipment. Any damage caused by abuse may be the responsibility of the Contractor. Contractors will provide data circuits capable of establishing satisfactory point-to-point and multi-point connections with the video conferencing equipment at SCDJJ. To insure proper video quality all video conferencing circuits will connect through SCDJJ's MPLS cloud and firewall. Reimbursement for expenses qualified under USAC Schools and Libraries Program (E-Rate) or other government funding sources shall be the responsibility of the vendor. All devices accessible by students must comply with Children's Internet Protection Act (CIPA) regulations. Reimbursement for expenses qualified under USAC Schools and Libraries Program (E-Rate) or other government funding sources shall be the responsibility of the Contractor. Contractors must be on the same web based curriculum as the Agency and may only change with prior approval of the Agency. SCDJJ Office of Information Technology (OIT) personnel will be available to assist contractors with hardware and software requirements to meet Information Technology requirements of this contract.

Generations Bridges is under the auspices of the local school district. Generations will provide high speed Internet connection consistent with the bandwidth equal to or greater than that supplied to SCDJJ managed sites.

Upon termination of the contract, all real property and facilities and all personal property purchased by the contractor(s) in order to provide the services required by this contract will become the property of the State of South Carolina.

### **C. Programmatic Requirements**

Services will be in compliance with all standards outlined in the State Standards for Residential Services. (*Attachment 1*) These programs are not approved as an alternative setting referenced on page 9 of the Standards. Services delivered by the contractor(s) will be related to the individual juvenile's needs.

The contractor(s) will provide documentation regarding the delivery of services to juveniles in conformity with these standards and there will be no reimbursement for services delivered by the program for which the documentation is judged inadequate by the Department of Juvenile Justice, or other duly authorized entity.

The contractor(s) will ensure proper credentialing of human services professional in accordance with State Standards. No reimbursement will be provided by the Department of Juvenile Justice for services rendered by the contractor(s)' staff who fails to meet requirements for credentialing.

The contractor(s) will participate in Quality Assurance activities to ensure that services are delivered in compliance with all standards and guidelines set forth in the current and applicable State Standards for Residential Services.

The following issues are listed for clarification:

1. Reimbursement will occur in the manner outlined in the SCDJJ Contract. Payment will be provided by SCDJJ on a monthly basis.
2. Parental permission forms are not required for juveniles who are placed by court order or transferred by the Department of Juvenile Justice.
3. SCDJJ will provide referral information.

If the State develops new or changed standards for services, the provider must make changes in their program in order to conform to those standards.

The contractor(s) will participate in Quality Assurance Reviews, which will address the following issues:

1. Quantitative and qualitative assessment of service records.
2. Assessment of the contractor's compliance with program standards/guidelines.
3. Assessment of the Quality Assurance activities of the contractor(s).
4. Review of program operation and evaluation of documentation by staff.
5. An exit conference with each contractor(s) upon completion of each audit.

The contractor(s) will complete a corrective action plan within fourteen (14) days of receipt of the audit report. Corrective action plans will be submitted to the Department of Juvenile Justice Community Alternatives Section.

Regardless of level of care, awake supervision will be provided 24 hours a day, 7 days a week. Contractors should be prepared to intensify staffing and supervision during emergencies, which include but is not limited to situations in which a pick up order is being secured or a transport by the SCDJJ police is being arranged.

Educational and vocational services must be provided on site and in compliance with guidelines and requirements outlined by the State Department of Education. (*Attachment 3*). Teachers that are hired should be certified in one of the four core areas which include Math, English, Science, and Social Studies.

When appropriate, juveniles will be given the opportunity to obtain the Graduate Equivalency Diploma (GED) or a high school diploma. Instruction in the academic core courses, basic skills remediation, and GED objectives for juveniles as deemed appropriate according to age and academic objectives will be provided by teachers with appropriate certification from the South Carolina Department of Education.

Appropriately certified teachers will provide Special Education Services for all juveniles identified as disabled by the Individual with Disabilities Education Act (IDEA). Each disabled juvenile will have an up-to-date Individual Education Plan (IEP) and its requirements will be followed. All South Carolina Department of Juvenile Justice Special Education procedures will be followed.

Program objectives will include the following:

1. Reduce recidivism;
2. Increase vocational skills;
3. Increase academic skills;
4. Address those behavioral disorders, emotional problems or acting out behaviors which resulted in placement in the Program;
5. Provide individual, group and family counseling;
6. Prepare program participants for employment;
7. As appropriate, assist the juveniles in finding jobs upon completion of the program;
8. Provide community service;
9. Assist in holding the juvenile accountable through reparation to the victim and/or community harmed.

In support of objective 6, preparation for employment, strategies in support of this objective must be included in the program design. When appropriate, juveniles should be given the opportunity to enroll in college courses either by distance learning or on campus. This will require personnel to support this effort by handling registration, funding, oversight, and transportation if needed.

In an annual report for each fiscal year, the contractor will document accomplishment related to these objectives.

#### **D. Aftercare Program required for Camp Aspen and Generations**

The Contractor(s) shall provide three months of aftercare or until the conclusion of probation or parole, whichever occurs first. Aftercare will not be required for juveniles whose length of stay at the camps is less than 30 days. Service will include, but not limited to, the use of telephone communication, “in-person” visits, school and employment site monitoring and intermittent spot checks to confirm compliance with parole.

1. During the first month after returning home, contacts must be accomplished weekly. At least two should be in person and should include relevant family or community members, not just the juvenile. Three in person visits are recommended.
2. During the second month after returning home, three contacts must be accomplished. At least two contacts must be in person.
3. During the third month after returning home, two contacts must be accomplished. At least one contact must be in person.

Documentation of contacts must be provided to the SCDJJ Parole/Probation Officer within three days of the contact. Should the juvenile violate the terms of his parole, the Parole/Probation Officer must be notified immediately or the next working day.

#### **E. Medical and Dental Services**

Financial responsibility for the juvenile's medical and dental related injuries and illnesses will be in the following order:

1. Medicaid or parental payment will be accessed whenever possible;
2. As appropriate, claims will be made against the contractor's accident insurance policy;
3. Insurance deductible amounts and all other out-of-pocket medical and dental expenses to an aggregate of \$4,000 per year will be the responsibility of the contractor(s).
4. Department of Juvenile Justice will assume the remaining expenses incurred by its juveniles while juveniles are at the contractor's facility, provided however, that the Agency retains the right to subrogate its expenses against any and all insurance benefits and related coverages and that the injury or illness is not the result of negligence or intentional acts or omissions on the part of the contractor(s) or its representatives;
5. Non-emergency medical and dental treatment will be approved in advance by the Project Monitor or designee;
6. Treatment for all injuries or illnesses presenting a serious threat of life, disability, or disfigurement need not be approved by the Project Monitor, but will be reported to the Project Monitor at the earliest possible time.
7. SCDJJ Health Services will be responsible for medical bills of juveniles on transfer status. Contractors are required to establish agreements with local providers to ensure that these providers will accept payment at Medicaid rates for services provided, and will adhere to applicable State laws and regulations. The contractor will produce and complete these signed agreements, and will mail or fax a copy of each agreement to SCDJJ Health Services. Once received, SCDJJ will sign and return a copy of the agreement to the contractor for their records. See Attachment 4 for mailing address and example agreements.
8. For juveniles assigned to the program on transfer status, insurance deductible amounts and all non-insured, non-elective medical, pharmaceutical and dental expenses resulting from non-elective and necessary medical services provided to juveniles, shall be paid by, and be the responsibility of, SCDJJ. For juveniles on probation or parole status, medical services will continue to be covered by Medicaid. Out of pocket expenses for these juveniles up to an aggregate total of \$4,000 per year will remain the responsibility of the contractor. Expenses in excess of an aggregate total of \$4,000 per year will be the responsibility of SCDJJ. For

juveniles assigned to this program on transfer status, all parties to this contract shall adhere to the following general guidelines, and any subsequent more specific guidelines which follow:

- a. Medical, dental and other treatment services paid by SCDJJ pursuant to this Amendment are limited to emergencies, urgent care and non-elective necessary care. Payment for any other medical care provided to juveniles on transfer status with the contractor, if incurred, shall be the responsibility of the contractor. Emergencies are defined as medical services necessary to maintain a juvenile's life, limb or eyesight. Urgent care is defined as medical services necessary to insure that a juvenile's physical health is not at risk or has not been seriously affected. Non-elective necessary care is defined as essential or highly advisable services needed to maintain a juvenile's health and wellbeing (e.g., tetanus shot).
- b. If time allows, prior to obtaining medical services, the contractor shall contact the legal guardian to determine if insurance coverage is available. If so, the contractor shall obtain the necessary insurance information and inform the provider. If time does not allow prior to the services being rendered, the contractor shall contact the parent or legal guardian as soon as possible after services are initiated, obtain this information and provide it to the provider.
- c. The contractor shall complete a referral form on each procurement verifying the legal status of the child and the results of the contact with the guardian regarding insurance coverage. This referral form will be provided by SCDJJ to the contractor. (See Attachment 4)
- d. The contractor shall submit the referral form and invoice to SCDJJ Health Services for payment by the Health Services directly to the provider. The contractor will provide the referral form and invoice to SCDJJ within 5 days of receipt of the invoice from the provider. SCDJJ will not accept invoices that are over 180 days past the date of the invoice, and the contractor will be responsible for paying the provider for these services.
- e. Should the contractor choose to pay a provider directly (excluding any services provided by a State Agency), or the provider requires the contractor to pay the provider directly, SCDJJ will reimburse the contractor upon the contractor filing with the Department all required documents set forth in paragraph (d) above. The contractor will submit all requests for reimbursement within 30 days from the date of payment by the contractor. SCDJJ will not accept requests for reimbursement dated over 180 days from the date of the payment by the contractor.
- f. **Attachment 4** provides further details on the Medical Billing Process, and sample agreements between contractors and outside healthcare providers.

#### **F. Food Services**

All meals served will be in compliance with the 1989 Recommended Daily Allowance for meals as established by the National Academy of Sciences. The contractor(s) will provide 3,250 to 3,500 calories, 4-week cycle menus, which includes an evening snack. The contractor(s) must meet all Federal guidelines for the National Breakfast and Lunch Program.

The contractor(s) will submit the menu for the following month, already approved by a registered dietitian to the Department of Juvenile Justice's Dietary Program Manager for approval no later

than the 15<sup>th</sup> of each month. Meals served at the facility will always be under the supervision of the contractor(s).

The contractor(s) will provide at no additional cost, religious and medical diets conforming to special religious or physician-ordered specifications. The contractor(s) should consider this requirement to be an unusual circumstance.

#### **G. Prison Rape Elimination Act (PREA) Standards**

The contractual program shall adopt and comply with the federal Prison Rape Elimination Act (PREA) Standards in regards to any juvenile transferred by SCDJJ to the contractual program. The contractual program shall ensure that all its employees and all of the employees of other agencies, entities, or contractors who directly supervise transferred juveniles are oriented and trained on their responsibilities related to PREA prior to allowing those employees to have contact with any transferred juvenile. The contractual program shall immediately report each PREA related incident, complaint allegation, or investigation to SCDJJ. The program will be in accord with all ERMIS reporting requirements. During normal working hours, SCDJJ's Office of Community Alternatives shall be immediately contacted by the Program and report whatever preliminary information about the event is available to them at that time. After normal working hours, or on a Saturday, Sunday, or holiday, SCDJJ's Inspector General's Office shall be immediately contacted via an ERMIS report with the same information contained within.

### **ADDITIONAL PROVISIONS**

#### **A. PERSONNEL**

The contractor(s) must maintain an adequate level of professional staff within the program to ensure that programmatic expectations are achieved and that all services are provided in accordance with the applicable State standards and requirements. To facilitate proper coordination and communications, the contractor(s) will notify the Project Monitor whenever managers and lead clinical staff are to be replaced.

The contractor(s) will ensure that all staff, subcontractors or volunteers who come into contact with the juveniles are properly qualified, trained and supervised. Background checks will be conducted on all such individuals to include at a minimum, searches of law enforcement records and the South Carolina Department of Social Services Child Abuse Registry. Contractor(s) will require drug testing of all staff involved in the provision of services. In addition, all Requirements of the State Standards for Residential Services will be met.

The contractor(s) will maintain and make available upon request, appropriate records and documentation of such qualifications and investigations. In the event that the contractor(s) or any of its employees, subcontractors or volunteers are investigated, arrested, or convicted for criminal wrongdoing, the Project Monitor will be notified immediately.

In the event that the contractor(s), employee, subcontractor or volunteer is investigated by any professional licensing board, regulatory board, or by any child protective service agency, the contractor(s) will notify the Project Monitor within one business day of the circumstances surrounding such investigation and of any findings or actions resulting from same.

## **B. REVIEW**

Fiscal and programmatic reviews may be conducted at any reasonable time by Federal, State, and Department of Juvenile Justice personnel, and other persons duly authorized by the Department of Juvenile Justice.

These reviews may include meetings with juveniles, review of fiscal and service records, review of fiscal and service policies, review of procedural issuances, review of staffing ratios and job descriptions, and meetings with the staff involved in the provision of services.

The contractor(s) must cooperate with any such review and will provide to the Department of Juvenile Justice such information and data as may be reasonably requested.

## **C. HEALTH AND SAFETY STANDARDS**

The contractor(s) must meet or exceed all local, state and federal standards and requirements related to the safe and sound operation of a residential facility, including, but not limited to, matters of health, sanitation, staffing, program integrity, and fire safety.

Health and Fire Inspections will be obtained annually. Should deficiencies be noted, corrective action will be made by the contractor(s) as required by the inspecting authority at no additional cost to the State.

## **D. COORDINATION**

The contractor(s) must send to the appropriate Department of Juvenile Justice County Case Manager copies of monthly progress reports relating to the juvenile's status and/or progress. Except in cases of extreme emergency, the contractor(s) must involve the County Case Manager prior to any and all major decisions affecting the child. In emergency situations, the contractor(s) must notify the County Case Manager as soon as possible and in no case later than one workday after the emergency occurs.

Within the Department of Juvenile Justice, the Classification Section authorizes placement of committed juveniles. The contractor(s) will not discharge transferred juveniles to a lower level of supervision without the written approval of the SCDJJ Classification Section.

A daily headcount will be reported to the Project Monitor. Reports will be submitted to the Juvenile Parole Board by the contractor(s) as required and transportation will be provided to parole hearings when needed.

#### **E. COMPLIANCE WITH CIVIL RIGHTS ACT OF 1964, AMERICANS WITH DISABILITIES ACT, AND SECTION 504 OF THE REHABILITATION ACT OF 1973**

The contractor(s) must comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act, the Civil Rights Act of 1964, and all requirements imposed by or pursuant to Regulations of the Department of Health and Human Services issued pursuant to these Acts, to the end that, no person will, on the grounds of race, color, religion, age, sex, handicap or national origin, be excluded from participation in, denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the contractor(s) receives payment pursuant to this contract.

#### **F. CONFIDENTIALITY**

The contractor(s) will maintain strict confidentiality and privacy of all information, records and communications regarding juveniles of the referring State agency. Except as provided for under applicable State and Federal laws and regulation, contractor(s) will release no information about a juvenile of the referring agency in any form which makes him or her individually identifiable to any person or entity without written order of a Family Court Judge, written permission from the Department of Juvenile Justice (which will only be given absent parental and/or client permission if an exception to the general confidentiality law exist in state law), the juvenile's parent or legal guardian of the juvenile (if 18 years of age or older, and competent).

#### **G. SAFETY PRECAUTIONS**

The State assumes no responsibility with regard to accidents, illnesses, or claims arising out of any work undertaken with the assistance of State funds.

The contractor(s) will take necessary steps to insure and protect itself and its personnel. The contractor(s) will comply with all applicable local, state and federal occupational and safety acts, standards, rules and regulations.

## **H. REQUIREMENTS FOR DRIVERS**

The contractor(s) will comply with the following requirements for employees who transport the juveniles:

1. Such employees will possess a current valid driver's license appropriate to the class of vehicle to be operated.
2. The contractor(s) will keep on file and, upon request, will furnish the Department of Juvenile Justice with a copy of the Motor Vehicle Record (MVR) for all such employees.
3. Such employees whose MVR shows involvement in more than two accidents in the last three years in which said employee was at fault, or against whom more than eight current violation points have been assessed, will be unqualified to transport juveniles.
4. Such employees will wear a seat belt while transporting juveniles and will require juveniles who are being transported to wear a seat belt.

## **I. JUVENILE INJURIES AND ILLNESSES**

The contractor(s) will at all times conduct the activities of the program in a reasonable, prudent, and safe manner as to avoid and prevent injuries and illnesses to the juveniles. In the event that a juvenile is injured or becomes ill, the contractor(s) will be responsible for providing immediate emergency first aid care by trained personnel and for further obtaining competent and qualified medical attention as the condition may warrant.

## **J. CHILD ABUSE**

The contractor(s) will comply with the provisions of the South Carolina Protection Act (Sections 63-7-10 and 63-7-1210(A), et. seq. Code of Laws of South Carolina, as amended) and to report all cases of suspected child abuse to the local Department of Social Services.

## **K. INAPPROPRIATE PHYSICAL CONTACT WITH CLIENTS**

The use of physical contact to punish, discipline, or otherwise threaten or coerce a juvenile is strictly prohibited by law and within the terms of this contract. However, when a juvenile presents a clear and present danger to himself/herself or others, physical contact to the minimum extent necessary may be used to control the situation. Additional information may be obtained from the Department of Juvenile Justice Administrative Policy B-3.9 (Employee Ethics and Relations with Others) and Policy I-3.1 (Alleged Abuse and Neglect of a Juvenile).

In accordance with State law and the Agreement between the Department of Juvenile Justice and the Department of Social Services regarding Investigations of Suspected Child Abuse and Neglect, as defined in the Department of Juvenile Justice Policies and Procedures, the contractor(s) must in any instance in which a juvenile alleges to have been abused or neglected, immediately report such allegations to the Office of the Inspector General of the Department of Juvenile Justice by

telephone and follow up with a written report in accordance with reporting procedures as outlined in SCDJJ's Event Reporting Management Information System Policy [ERMIS]. (*Attachment 5*)

A verbal report and copies of the written report will also be submitted to the Project Monitor. Investigations will be conducted by Department of Juvenile Justice, and when appropriate, law enforcement. The Department of Juvenile Justice Program Monitor will be informed in writing of disciplinary action related to the conduct of staff members who are indicated for inappropriate physical contact.

#### **L. RELIGIOUS BELIEFS**

The contractor(s) will not make any attempts to recruit or convert the juveniles to a particular religion or set of beliefs. The contractor(s) will not make attendance at religious services mandatory, or otherwise require religious activities as a condition for services. The juveniles will be given every practical opportunity to practice their personal religious beliefs, obtain religious counseling when requested, and attend religious ceremonies and services.

#### **M. DISCLOSURE OF INFORMATION**

The use or disclosure by any party of any information concerning the juvenile, in violation of any rule of confidentiality, is prohibited except on written consent of a Family Court Judge or the Department of Juvenile Justice in accordance with Sections 63-19-2020 and 63-19-2010, Code of Laws of South Carolina, 1976, as amended. Contractor(s) must be in compliance with all Health Insurance Portability and Accountability Act requirements.

#### **N. RECORDS**

The contractor(s) will maintain or supervise the maintenance of records necessary for the proper and efficient operation of the program and in a manner that conforms to Department of Juvenile Justice policy, including records regarding admissions and discharges, determination of eligibility (when applicable), the provision of services and other administrative costs, statistical, fiscal, and other records necessary for reporting accountability under South Carolina and Federal requirements. The contractor(s) will maintain a comprehensive case record on each juvenile.

#### **O. INSPECTION AND AUDIT**

The contractor's records will be subject at all reasonable times to inspection and audit by the Contracting Officer, the Department of Juvenile Justice Internal Auditor, South Carolina Auditor's Office, and the South Carolina Comptroller General's Office, or any authorized representatives thereof. A financial fiscal audit of the contractor(s) will be performed annually by an independent accounting firm. A copy of the resultant audit report is to be submitted to the Department of Juvenile Justice no later than one hundred twenty (120) days following the end of a contract period.

## P. PRESERVATION OF RECORDS

The right of inspection and audit will continue, and the contractor(s) will retain all financial and programmatic records related to the delivery of services under this contract in accordance with existing Department of Juvenile Justice, State and Federal regulations after the expiration of this contract. Under any circumstances, these records will be retained a minimum of six (6) years.

1. If this contract is completely or partially terminated, the records relating to work terminated will be preserved and made available for a period of six (6) years from the date of any complete or partial termination of the contract.
2. Records which will be retained will include all:
  - a. Financial and programmatic records related to the delivery of services;
  - b. Appeals arising from "Disputes" relating to services delivered pursuant to this contract;
  - c. Litigation relating to the settlement of claims arising out of the performance of this contract;
  - d. Costs and expenses of the contractor(s), as to services for which exception has been taken by the Contracting Officer, will be retained until such appeals, litigation, claims, or exceptions have been disposed of;
  - e. Incomplete and complete audits relating to services delivered pursuant to this contract.

## Q. REPORTS

1. The contractor(s) will prepare and submit Monthly Program Monitoring Reports as outlined in *(Attachment 6)* to the Project Monitor. These monitoring reports will provide pertinent information to fully apprise the Department of Juvenile Justice of the contractor's activities during the preceding month which includes, but is not limited to: a) the implementation of services to include education and social services provided for in the contract, b) statistical records which indicate the number of persons served, and c) the nature of services rendered, and any existing or anticipated problems.
2. The contractor(s) will prepare and submit Annual Reports as outlined in the Programmatic Requirements of this request for proposals.
3. A Financial Cost Report detailing the project's annual expenditures will be submitted to the Department of Juvenile Justice Accounts Manager with a copy to the Project Monitor within sixty (60) days after the end of each fiscal year. In the event that the contractor's audited financial statement does not correspond to the state fiscal year, SCDJJ may require the cost report sixty (60) days after the conclusion of the audited financial year for the contractor's company or organization.
4. The contractor shall submit an inventory listing annually to SCDJJ. This report shall be submitted at the end of each state fiscal year.
5. Contractors will be in compliance with the SCDJJ Event Reporting Management Information System [ERMIS]. *(Attachment 5)*.
6. In accordance with the provisions of State law, the contractor(s) will report to the Department of Social Services State Office, any child in the custody of DSS who does not receive a face-to-face visit monthly. A copy must be maintained in the client's file. A reporting form and fax number can be obtained from the Department of Social Services.

## **R. NOTICE TO THE STATE REGARDING PERFORMANCE REQUIREMENTS**

In the event the contractor(s) encounters difficulty in meeting performance requirements, or anticipates difficulty in complying with the contract, the contractor(s) will immediately notify the Contracting Officer thereof in writing, giving pertinent details, including the date by which it expects to meet performance criteria.

The receipt of any notice or information given to the Contracting Officer by the contractor(s) will not be construed as a waiver or forfeiture by the Department of Juvenile Justice of, or in any way restrict or postpone any rights or remedies provided to the Department of Juvenile Justice by law or under this contract.

## **S. METHOD AND SOURCE OF PAYMENT**

Contract payments will be reimbursed to the Contractor(s) based on a monthly contract total. It will be the objective of SCDJJ and the contractor(s) to maximize services and achieve the highest possible utilization. SCDJJ will provide referrals of juvenile participants. Contractors will be encouraged to maintain at least 90% utilization for the contract year. SCDJJ shall serve as the sole billing source for the total unit cost.

All funds paid by SCDJJ shall be expended for the contracted services. Such funds expended in violation of this Contract shall be refunded in full to SCDJJ, or if the Contract is still in force, shall be withheld by SCDJJ from any subsequent request for payment.

## **T. ALLOWABLE COSTS**

The contractor(s) will utilize funds made available under the contract only for necessary items of cost. Allowable costs will be generally defined as those expenses normal and appropriate under South Carolina State Government regulations. These costs are outlined in the State Accounting and Reporting System (STARS) Manual.

It is the contractor's responsibility to monitor expenditures and their appropriateness and to determine the allowability, through inquiry to the Department of Juvenile Justice, of any extraordinary or unusual expense. The Department of Juvenile Justice may review the contractor's financial records to determine the reasonableness of expenditures under the terms of this contract. The contractor(s) will maintain an adequate accounting system and related records.

The Department of Juvenile Justice will claim title and ownership to all buildings and to all equipment and other inventory having a value of more than \$300 or a useful life of more than one (1) year which are purchased by the contractor(s) in order to provide the services required herein. If this contract is terminated or otherwise not renewed, the contractor(s) may propose to purchase, with monies other than those received from the Department of Juvenile Justice, any item for which the Department of Juvenile Justice claims ownership.

The contractor(s) is encouraged to solicit private support for their programs through volunteers, donations, or other services. If the contractor(s) proposes to claim USDA reimbursement directly, this must be clearly outlined as projected revenue in the proposal. For all programs incorporated in the SCDJJ school district, education funding will be claimed by SCDJJ.

Any donations solicited for this program in the name of this program and the Department of Juvenile Justice will become the property of the Department of Juvenile Justice in accordance with the same terms and conditions as property purchased with state funds unless otherwise approved by the Department of Juvenile Justice.

## **U. GRIEVANCES**

The contractor(s) will maintain a system through which juveniles may present grievances and receive a fair hearing concerning the provision of services. The juvenile will have the right to appeal the contractor's decision to the Department of Juvenile Justice.

In the event of an appeal, the contractor(s) will appear, participate, and justify its actions. The contractor(s) will provide written notice of these rights to juveniles, who will acknowledge advisement of these rights and of the program's rules and regulations by signature. Such signing will take place prior to or at the time of the program's official acceptance of the juvenile.

## IV. INFORMATION FOR OFFERORS TO SUBMIT

### Technical Proposal

Offeror must submit one hardcopy proposal marked "Original", five hardcopies of the original proposal each marked "Copy", one Magnetic Media (see MAGNETIC MEDIA – REQUIRED FORMAT page 13), and one Redacted Offer (see SUBMITTING REDACTED OFFERS page 13).

### Price Proposal

Offeror must submit one original hardcopy Price Proposal in a separately sealed envelope marked "Price Proposal" within the proposal package. **Price Proposal must state Offeror's name, Location Offeror is bidding, and MARINE & WILDERNESS CAMPS FOR SCDJJ RFP No. 5400007516.** See Part C, Price Proposal below for additional details.

## INFORMATION FOR OFFERORS TO SUBMIT -- GENERAL (JAN 2006)

Offeror shall submit a signed Cover Page and Page Two. Offeror should submit all other information and documents requested in this part and in parts II.B. Special Instructions; III. Scope of Work; V. Qualifications; VIII. Bidding Schedule/Price Proposal; and any appropriate attachments addressed in section IX. Attachments to Solicitations. [04-4010-1]

## INFORMATION FOR OFFERORS TO SUBMIT -- EVALUATION (JAN 2006)

In addition to information requested elsewhere in this solicitation, offerors should submit the following information for purposes of evaluation:

### All information must be presented in the listed order:

- A. Program Description: Offeror must provide a comprehensive program description incorporating elements in the State Standards and confirming compliance with all the details of this document.

Education Program: Offeror must include their education program and pertinent information regarding their program description for these specific SCDJJ service programs. Also, provide a 4-week cycle menus with your response.

- B. Administrative and Financial Capability: A brief description of the history and background of your organization in order to show your experience in providing services to emotionally and/or behaviorally disturbed children.

1. *Financial Assurance*. Provide assurance that the financial system you use will adequately safeguard the public funds you will receive. Enclose a copy of Offeror's Independent Auditor's Report Statement (the cover letter to the audit report) conducted within the last three years. Note: If the Independent Auditor's Report Statement indicates that there are any problems with your accounting system, submit an explanation of the problems and describe what was done (or is being done) to resolve them.
2. *Staff Capability*. The offeror must provide evidence that its staff is capable of providing the needed services. Enclose a copy of the job description and resumes of key staff who will be involved with the proposed program.
3. *History and Background*. The offeror must demonstrate that its history and background are such that it is probable that it will be able to operate this program effectively.

- a. Describe the background of the offeror in providing services to juvenile offenders as related to this program.
  - b. Provide a brief description of all related programs (including the number of clients per year, the total annual program budget and the annual cost per client) which you have administered during the past five years.
4. *Start-up Time.* The offeror must show that the time required to start up this program is reasonable.
- a. A timetable showing start-up activities on a bi-weekly basis must be included.
  - b. If the provider is not able to accept referrals of clients by the date shown in the timetable, the State reserves the right to cancel the contract and issue a new Request for Proposal(s).
5. *Evaluations of Program Effectiveness and Outcomes.* The offeror will provide a summary of evaluations for programs currently operated which are similar to this program.

C. Price Proposal: The Price Proposal must include a budget to include all Program Costs and a Budget Justification and be submitted and prepared in accordance with *Attachment 7*. The maximum available budget for the program is:

		<u>Purchased Beds</u>	<u>Licensed Beds</u>
Georgetown Marine Institute:	\$ 1,378,550	34 Beds	34
Piedmont Wilderness Institute:	\$ 1,378,550	34 Beds	34
Camp Bennettsville:	\$ 1,546,820	40 Beds	80
Camp Sand Hills:	\$ 1,549,183	40 Beds	48
Camp White Pines:	\$ 1,540,238	40 Beds	80
Camp Aspen:	\$ 1,672,715	36 Beds	36
Generations:	\$ 1,535,834	26 Beds	26

At the option of SCDJJ, SCDJJ may purchase additional beds up to the maximum number of licensed beds.

The cost, for this contract period and renewal years, for the potential purchase of available beds at the discretion of SCDJJ is as follows:

8 Beds at Camp Sandhills- \$309,837

16 beds at Camp White Pines- \$616,095

16 beds at Camp Bennettsville- \$618,728

40 beds at Camp White Pines -\$1, 540,238

40 beds at Camp Bennettsville- \$1,546,820

Note:

1. Should there be requested and approved cost of living adjustment(s) the cost for the purchase of these additional beds would be adjusted accordingly.
2. During peak periods numbers 1 through 3 above may be purchased for a temporary period of time in 30 day increments. The above purchase costs are an annual figure. The cost would be pro-rated in accord with the time period purchased.
3. Regarding the oversight of Camps Bennettsville 2 and White Pines 2, at the sole discretion of DJJ, the upkeep and management of these properties by the Provider may be terminated at any time.

**D. Oral Presentation:** Offeror will be required to give up to a 30-minute presentation to the evaluation panel members, with the presentation content and structure to be determined by the offeror. The presentation will be followed by about a 20-minute session for questions, answers and discussion with the evaluation panel. Oral Presentation and responses to questions should verify or clarify what is written in the Offeror's proposal. Offeror's representatives who would supervise and be involved with providing services should be key presenters in the presentation. Travel expenses and all other costs incurred to participate in the oral presentation are the responsibility of the Offeror. Procurement Officer will have the option to waive the Oral Presentation requirement.

The State expects oral presentations to be held June 10, 11, and 12, 2014, at the Capitol Center, Materials Management Office, 1201 Main Street Suite 600, Columbia, South Carolina, 29201. The Procurement Manager will contact Offerors to discuss specific details for Oral Presentations soon after opening. [04-4005-1]

#### **MINORITY PARTICIPATION (JAN 2006)**

Is the bidder a South Carolina Certified Minority Business? ☐ Yes ☐ No

Is the bidder a Minority Business certified by another governmental entity? ☐ Yes ☐ No

If so, please list the certifying governmental entity: \_\_\_\_\_

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor? ☐ Yes ☐ No

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor? \_\_\_\_\_

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor? ☐ Yes ☐ No

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor? \_\_\_\_\_

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- ☐ Traditional minority
- ☐ Traditional minority, but female
- ☐ Women (Caucasian females)
- ☐ Hispanic minorities
- ☐ DOT referral (Traditional minority)
- ☐ DOT referral (Caucasian female)
- ☐ Temporary certification
- ☐ SBA 8 (a) certification referral
- ☐ Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

For a list of certified minority firms, please consult the Minority Business Directory, which is available at the following URL: <http://www.govoepp.state.sc.us/osmba/>  
[04-4015-1]

## **V. QUALIFICATIONS**

### **QUALIFICATION OF OFFEROR (JAN 2006)**

To be eligible for award of a contract, a prospective contractor must be responsible. In evaluating an Offeror's responsibility, the State Standards of Responsibility [R.19-445.2125] and information from any other source may be considered. An Offeror must, upon request of the State, furnish satisfactory evidence of its ability to meet all contractual requirements. Unreasonable failure to supply information promptly in connection with a responsibility inquiry may be grounds for determining that you are ineligible to receive an award. S.C. Code Section 11-35-1810. [05-5005-1]

### **SUBCONTRACTOR -- IDENTIFICATION (JAN 2006)**

If you intend to subcontract with another business for any portion of the work and that portion exceeds 10% of your price, your offer must identify that business and the portion of work which they are to perform. Identify potential subcontractors by providing the business name, address, phone, taxpayer identification number, and point of contact. In determining your responsibility, the state may evaluate your proposed subcontractors. [05-5030-1]

## **VI. AWARD CRITERIA**

### **AWARD CRITERIA -- PROPOSALS (MODIFIED)**

Awards will be made to the highest ranked, responsive and responsible offerors for each location whose offers are determined to be the most advantageous to the State for that location.

### **COMPETITION FROM PUBLIC ENTITIES (JAN 2006)**

If a South Carolina governmental entity submits an offer, the Procurement Officer will, when determining the lowest offer, add to the price provided in any offers submitted by non-governmental entities a percentage equivalent to any applicable sales or use tax. S.C. Code Ann. Regs 117-304.1 (Supp. 2004). [06-6057-1]

### **EVALUATION FACTORS -- PROPOSALS (JAN 2006)**

Offers will be evaluated using only the factors stated below. Evaluation factors are stated in the relative order of importance, with the first factor being the most important. Once evaluation is complete, all responsive offerors will be ranked from most advantageous to least advantageous.

- A. Program Description & Education Program
- B. Administrative and Financial Capability
- C. Price Proposal

#### **NOTE:**

- Oral Presentation will not be scored separately but will be used at the discretion of the evaluation panel in the overall scoring of the proposal.
- Price Proposal will be scored by the following MMO Formula:

Low Bid/Low Bid	X	Points Assigned for Price	=	Points Awarded for Price
Low Bid/Next Low Bid	X	Points Assigned for Price	=	Points Awarded for Price

[06-6065-1]

## **VII. TERMS AND CONDITIONS -- A. GENERAL**

### **ASSIGNMENT (JAN 2006)**

No contract or its provisions may be assigned, sublet, or transferred without the written consent of the Procurement Officer.[07-7A004-1]

### **BANKRUPTCY (JAN 2006)**

(a) Notice. In the event the Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, the Contractor agrees to furnish written notification of the bankruptcy to the Using Governmental Unit. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to the bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of all State contracts against which final payment has not been made. This obligation remains in effect until final payment under this Contract. (b) Termination. This contract is voidable and subject to immediate termination by the State upon the contractor's insolvency, including the filing of proceedings in bankruptcy. [07-7A005-1]

### **CHOICE-OF-LAW (JAN 2006)**

The Agreement, any dispute, claim, or controversy relating to the Agreement, and all the rights and obligations of the parties shall, in all respects, be interpreted, construed, enforced and governed by and under the laws of the State of South Carolina, except its choice of law rules. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation. [07-7A010-1]

### **CONTRACT DOCUMENTS and ORDER OF PRECEDENCE (JAN 2006)**

(a) Any contract resulting from this solicitation shall consist of the following documents: (1) a Record of Negotiations, if any, executed by you and the Procurement Officer, (2) documentation regarding the clarification of an offer [e.g., 11-35-1520(8) or 11-35-1530(6)], if applicable, (3) the solicitation, as amended, (4) modifications, if any, to your offer, if accepted by the Procurement Officer, (5) your offer, (6) any statement reflecting the state's final acceptance (a/k/a "award"), and (7) purchase orders. These documents shall be read to be consistent and complimentary. Any conflict among these documents shall be resolved by giving priority to these documents in the order listed above. (b) The terms and conditions of documents (1) through (6) above shall apply notwithstanding any additional or different terms and conditions in either (i) a purchase order or other instrument submitted by the State or (ii) any invoice or other document submitted by Contractor. Except as otherwise allowed herein, the terms and conditions of all such documents shall be void and of no effect. (c) No contract, license, or other agreement containing contractual terms and conditions will be signed by any Using Governmental Unit. Any document signed or otherwise agreed to by persons other than the Procurement Officer shall be void and of no effect. [07-7A015-1]

### **DISCOUNT FOR PROMPT PAYMENT (JAN 2006)**

(a) Discounts for prompt payment will not be considered in the evaluation of offers. However, any offered discount will form a part of the award, and will be taken if payment is made within the discount period indicated in the offer by the offeror. As an alternative to offering a discount for prompt payment in conjunction with the offer, offerors awarded contracts may include discounts for prompt payment on individual invoices.

(b) In connection with any discount offered for prompt payment, time shall be computed from the date of the invoice. If the Contractor has not placed a date on the invoice, the due date shall be calculated from the date the designated billing office receives a proper invoice, provided the state annotates such invoice with the date of receipt at the time of receipt. For the purpose of computing the discount earned, payment shall be considered to have been made on the date that appears on the payment check or, for an electronic funds transfer, the specified payment date. When the discount date falls on a Saturday, Sunday, or legal holiday when Federal Government offices are closed and Government business is not expected to be conducted, payment may be made on the following business day  
[07-7A020-1]

## **DISPUTES (JAN 2006)**

(1) Choice-of-Forum. All disputes, claims, or controversies relating to the Agreement shall be resolved exclusively by the appropriate Chief Procurement Officer in accordance with Title 11, Chapter 35, Article 17 of the South Carolina Code of Laws, or in the absence of jurisdiction, only in the Court of Common Pleas for, or a federal court located in, Richland County, State of South Carolina. Contractor agrees that any act by the Government regarding the Agreement is not a waiver of either the Government's sovereign immunity or the Government's immunity under the Eleventh Amendment of the United State's Constitution. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation. (2) Service of Process. Contractor consents that any papers, notices, or process necessary or proper for the initiation or continuation of any disputes, claims, or controversies relating to the Agreement; for any court action in connection therewith; or for the entry of judgment on any award made, may be served on Contractor by certified mail (return receipt requested) addressed to Contractor at the address provided as the Notice Address on Page Two or by personal service or by any other manner that is permitted by law, in or outside South Carolina. Notice by certified mail is deemed duly given upon deposit in the United States mail. [07-7A025-1]

## **EQUAL OPPORTUNITY (JAN 2006)**

Contractor is referred to and shall comply with all applicable provisions, if any, of Title 41, Part 60 of the Code of Federal Regulations, including but not limited to Sections 60-1.4, 60-4.2, 60-4.3, 60-250.5(a), and 60-741.5(a), which are hereby incorporated by reference. [07-7A030-1]

## **FALSE CLAIMS (JAN 2006)**

According to the S.C. Code of Laws Section 16-13-240, "a person who by false pretense or representation obtains the signature of a person to a written instrument or obtains from another person any chattel, money, valuable security, or other property, real or personal, with intent to cheat and defraud a person of that property is guilty" of a crime. [07-7A035-1]

## **FIXED PRICING REQUIRED (JAN 2006)**

Any pricing provided by contractor shall include all costs for performing the work associated with that price. Except as otherwise provided in this solicitation, contractor's price shall be fixed for the duration of this contract, including option terms. This clause does not prohibit contractor from offering lower pricing after award. [07-7A040-1]

## **NON-INDEMNIFICATION (JAN 2006)**

Any term or condition is void to the extent it requires the State to indemnify anyone. [07-7A045-1]

## **NOTICE (JAN 2006)**

(A) After award, any notices shall be in writing and shall be deemed duly given (1) upon actual delivery, if delivery is by hand, (2) upon receipt by the transmitting party of automated confirmation or answer back from the recipient's device if delivery is by telex, telegram, facsimile, or electronic mail, or (3) upon deposit into the United States mail, if postage is prepaid, a return receipt is requested, and either registered or certified mail is used. (B) Notice to contractor shall be to the address identified as the Notice Address on Page Two. Notice to the state shall be to the Procurement Officer's address on the Cover Page. Either party may designate a different address for notice by giving notice in accordance with this paragraph. [07-7A050-1]

## **PAYMENT and INTEREST (MAY 2011)**

(a) Unless otherwise provided in this Solicitation, the State shall pay the Contractor, after the submission of proper invoices or vouchers, the prices stipulated in this contract for supplies delivered and accepted or services rendered and accepted, less any deductions provided in this contract. Unless otherwise specified herein, including the purchase order, payment shall not be made on partial deliveries accepted by the Government. (b) Unless otherwise provided herein, including the purchase order, payment will be made by check. (c) Notwithstanding any other provision, payment shall be made in accordance with S.C. Code Section 11-35-45, which provides the Contractor's exclusive means of recovering any type of interest from the Owner. Contractor waives imposition of an interest penalty unless the invoice submitted specifies that the late penalty is applicable. Except as set forth in this paragraph, the State shall not be liable for the payment of interest on any debt or claim

arising out of or related to this contract for any reason. (d) Amounts due to the State shall bear interest at the rate of interest established by the South Carolina Comptroller General pursuant to Section 11-35-45 ("an amount not to exceed fifteen percent each year"), as amended. (e) Any other basis for interest, including but not limited to general (pre- and post-judgment) or specific interest statutes, including S.C. Code Ann. Section 34-31-20, are expressly waived by both parties. If a court, despite this agreement and waiver, requires that interest be paid on any debt by either party other than as provided by items (c) and (d) above, the parties further agree that the applicable interest rate for any given calendar year shall be the lowest prime rate as listed in the first edition of the Wall Street Journal published for each year, applied as simple interest without compounding. [07-7A055-2]

#### **PUBLICITY (JAN 2006)**

Contractor shall not publish any comments or quotes by State employees, or include the State in either news releases or a published list of customers, without the prior written approval of the Procurement Officer. [07-7A060-1]

#### **PURCHASE ORDERS (JAN 2006)**

Contractor shall not perform any work prior to the receipt of a purchase order from the using governmental unit. The using governmental unit shall order any supplies or services to be furnished under this contract by issuing a purchase order. Purchase orders may be used to elect any options available under this contract, e.g., quantity, item, delivery date, payment method, but are subject to all terms and conditions of this contract. Purchase orders may be electronic. No particular form is required. An order placed pursuant to the purchasing card provision qualifies as a purchase order. [07-7A065-1]

#### **SETOFF (JAN 2006)**

The state shall have all of its common law, equitable, and statutory rights of set-off. These rights shall include, but not be limited to, the State's option to withhold for the purposes of set-off any moneys due to the Contractor under this contract up to any amounts due and owing to the state with regard to this contract, any other contract with any state department or agency, including any contract for a term commencing prior to the term of this contract, plus any amounts due and owing to the state for any other reason including, without limitation, tax delinquencies, fee delinquencies or monetary penalties relative thereto. [07-7A070-1]

#### **SURVIVAL OF OBLIGATIONS (JAN 2006)**

The Parties' rights and obligations which, by their nature, would continue beyond the termination, cancellation, rejection, or expiration of this contract shall survive such termination, cancellation, rejection, or expiration, including, but not limited to, the rights and obligations created by the following clauses: Indemnification - Third Party Claims, Intellectual Property Indemnification, and any provisions regarding warranty or audit. [07-7A075-1]

#### **TAXES (JAN 2006)**

Any tax the contractor may be required to collect or pay upon the sale, use or delivery of the products shall be paid by the State, and such sums shall be due and payable to the contractor upon acceptance. Any personal property taxes levied after delivery shall be paid by the State. It shall be solely the State's obligation, after payment to contractor, to challenge the applicability of any tax by negotiation with, or action against, the taxing authority. Contractor agrees to refund any tax collected, which is subsequently determined not to be proper and for which a refund has been paid to contractor by the taxing authority. In the event that the contractor fails to pay, or delays in paying, to any taxing authorities, sums paid by the State to contractor, contractor shall be liable to the State for any loss (such as the assessment of additional interest) caused by virtue of this failure or delay. Taxes based on Contractor's net income or assets shall be the sole responsibility of the contractor. [07-7A080-1]

#### **TERMINATION DUE TO UNAVAILABILITY OF FUNDS (JAN 2006)**

Payment and performance obligations for succeeding fiscal periods shall be subject to the availability and appropriation of funds therefor. When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract shall be canceled. In the event of a cancellation pursuant to this paragraph, contractor will be reimbursed the resulting unamortized, reasonably incurred, nonrecurring costs. Contractor will not be reimbursed any costs amortized beyond the initial contract term. [07-7A085-1]

### **THIRD PARTY BENEFICIARY (JAN 2006)**

This Contract is made solely and specifically among and for the benefit of the parties hereto, and their respective successors and assigns, and no other person will have any rights, interest, or claims hereunder or be entitled to any benefits under or on account of this Contract as a third party beneficiary or otherwise. [07-7A090-1]

### **WAIVER (JAN 2006)**

The State does not waive any prior or subsequent breach of the terms of the Contract by making payments on the Contract, by failing to terminate the Contract for lack of performance, or by failing to strictly or promptly insist upon any term of the Contract. Only the Procurement Officer has actual authority to waive any of the State's rights under this Contract. Any waiver must be in writing. [07-7A095-1]

## **VII. TERMS AND CONDITIONS -- B. SPECIAL**

### **CHANGES (JAN 2006)**

(1) Contract Modification. By a written order, at any time, and without notice to any surety, the Procurement Officer may, subject to all appropriate adjustments, make changes within the general scope of this contract in any one or more of the following:

- (a) drawings, designs, or specifications, if the supplies to be furnished are to be specially manufactured for the [State] in accordance therewith;
- (b) method of shipment or packing;
- (c) place of delivery;
- (d) description of services to be performed;
- (e) time of performance (i.e., hours of the day, days of the week, etc.); or,
- (f) place of performance of the services. Subparagraphs (a) to (c) apply only if supplies are furnished under this contract. Subparagraphs (d) to (f) apply only if services are performed under this contract.

(2) Adjustments of Price or Time for Performance. If any such change increases or decreases the contractor's cost of, or the time required for, performance of any part of the work under this contract, whether or not changed by the order, an adjustment shall be made in the contract price, the delivery schedule, or both, and the contract modified in writing accordingly. Any adjustment in contract price made pursuant to this clause shall be determined in accordance with the Price Adjustment Clause of this contract. Failure of the parties to agree to an adjustment shall not excuse the contractor from proceeding with the contract as changed, provided that the State promptly and duly make such provisional adjustments in payment or time for performance as may be reasonable. By proceeding with the work, the contractor shall not be deemed to have prejudiced any claim for additional compensation, or an extension of time for completion.

(3) Time Period for Claim. Within 30 days after receipt of a written contract modification under Paragraph (1) of this clause, unless such period is extended by the Procurement Officer in writing, the contractor shall file notice of intent to assert a claim for an adjustment. Later notification shall not bar the contractor's claim unless the State is prejudiced by the delay in notification.

(4) Claim Barred After Final Payment. No claim by the contractor for an adjustment hereunder shall be allowed if notice is not given prior to final payment under this contract.  
[07-7B025-1]

### **COMPLIANCE WITH LAWS (JAN 2006)**

During the term of the contract, contractor shall comply with all applicable provisions of laws, codes, ordinances, rules, regulations, and tariffs. [07-7B035-1]

### **CONTRACTOR'S LIABILITY INSURANCE (MAR 2013)**

(a) Contractor shall procure from a company or companies lawfully authorized to do business in South Carolina and with a current A.M. Best rating of no less than A: VII, and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work and the results of that work by the contractor, his agents, representatives, employees or subcontractors. (b) Coverage shall be at least as broad as:

(1) Commercial General Liability (CGL): Insurance Services Office (ISO) Form CG 00 01 12 07 covering CGL on an "occurrence" basis, including products-completed operations, personal and advertising injury, with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, the general aggregate limit shall be twice the required occurrence limit. This contract shall be considered to be an "insured contract" as defined in the policy.

(2) Auto Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limits no less than \$1,000,000 per accident for bodily injury and property damage.

(3) Worker's Compensation: As required by the State of South Carolina, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

(b) Every applicable Using Governmental Unit, and the officers, officials, employees and volunteers of any of them, must be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance at least

as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used.

(c) For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the State, every applicable Using Governmental Unit, and the officers, officials, employees and volunteers of any of them. Any insurance or self-insurance maintained by the State, every applicable Using Governmental Unit, or the officers, officials, employees and volunteers of any of them, shall be excess of the Contractor's insurance and shall not contribute with it.

(d) Prior to commencement of the work, the Contractor shall furnish the State with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this section. All certificates are to be received and approved by the State before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The State reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by this section, at any time.

(e) Should any of the above described policies be cancelled before the expiration date thereof, notice will be delivered in accordance with the policy provisions. In addition, the Contractor shall notify the State immediately upon receiving any information that any of the coverages required by this section are or will be changed, cancelled, or replaced.

(f) Contractor hereby grants to the State and every applicable Using Governmental Unit a waiver of any right to subrogation which any insurer of said Contractor may acquire against the State or applicable Using Governmental Unit by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the State or Using Governmental Unit has received a waiver of subrogation endorsement from the insurer.

(g) Any deductibles or self-insured retentions must be declared to and approved by the State. The State may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

(h) The State reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

[07-7B056-1]

#### **CONTRACTOR PERSONNEL (JAN 2006)**

The Contractor shall enforce strict discipline and good order among the Contractor's employees and other persons carrying out the Contract. The Contractor shall not permit employment of unfit persons or persons not skilled in tasks assigned to them. [07-7B060-1]

#### **CONTRACTOR'S OBLIGATION -- GENERAL (JAN 2006)**

The contractor shall provide and pay for all materials, tools, equipment, labor and professional and non-professional services, and shall perform all other acts and supply all other things necessary, to fully and properly perform and complete the work. The contractor must act as the prime contractor and assume full responsibility for any subcontractor's performance. The contractor will be considered the sole point of contact with regard to all situations, including payment of all charges and the meeting of all other requirements. [07-7B065-1]

#### **CONTRACTOR'S USE OF STATE PROPERTY (JAN 2006)**

Upon termination of the contract for any reason, the State shall have the right, upon demand, to obtain access to, and possession of, all State properties, including, but not limited to, current copies of all State application programs and necessary documentation, all data, files, intermediate materials and supplies held by the contractor. Contractor shall not use, reproduce, distribute, display, or sell any data, material, or documentation owned exclusively by the State without the State's written consent, except to the extent necessary to carry out the work. [07-7B067-1]

#### **DEFAULT (JAN 2006)**

(a) (1) The State may, subject to paragraphs (c) and (d) of this clause, by written notice of default to the Contractor, terminate this contract in whole or in part if the Contractor fails to:

- (i) Deliver the supplies or to perform the services within the time specified in this contract or any extension;
- (ii) Make progress, so as to endanger performance of this contract (but see paragraph (a)(2) of this clause); or
- (iii) Perform any of the other material provisions of this contract (but see paragraph (a)(2) of this clause).

(2) The State's right to terminate this contract under subdivisions (a)(1)(ii) and (1)(iii) of this clause, may be exercised if the

Contractor does not cure such failure within 10 days (or more if authorized in writing by the Procurement Officer) after receipt of the notice from the Procurement Officer specifying the failure.

(b) If the State terminates this contract in whole or in part, it may acquire, under the terms and in the manner the Procurement Officer considers appropriate, supplies or services similar to those terminated, and the Contractor will be liable to the State for any excess costs for those supplies or services. However, the Contractor shall continue the work not terminated.

(c) Except for defaults of subcontractors at any tier, the Contractor shall not be liable for any excess costs if the failure to perform the contract arises from causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include (1) acts of God or of the public enemy, (2) acts of the State in either its sovereign or contractual capacity, (3) fires, (4) floods, (5) epidemics, (6) quarantine restrictions, (7) strikes, (8) freight embargoes, and (9) unusually severe weather. In each instance the failure to perform must be beyond the control and without the fault or negligence of the Contractor.

(d) If the failure to perform is caused by the default of a subcontractor at any tier, and if the cause of the default is beyond the control of both the Contractor and subcontractor, and without the fault or negligence of either, the Contractor shall not be liable for any excess costs for failure to perform, unless the subcontracted supplies or services were obtainable from other sources in sufficient time for the Contractor to meet the required delivery schedule.

(e) If this contract is terminated for default, the State may require the Contractor to transfer title and deliver to the State, as directed by the Procurement Officer, any (1) completed supplies, and (2) partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans, drawings, information, and contract rights (collectively referred to as "manufacturing materials" in this clause) that the Contractor has specifically produced or acquired for the terminated portion of this contract. Upon direction of the Procurement Officer, the Contractor shall also protect and preserve property in its possession in which the State has an interest.

(f) The State shall pay contract price for completed supplies delivered and accepted. The Contractor and Procurement Officer shall agree on the amount of payment for manufacturing materials delivered and accepted and for the protection and preservation of the property; if the parties fail to agree, the Procurement Officer shall set an amount subject to the Contractor's rights under the Disputes clause. Failure to agree will be a dispute under the Disputes clause. The State may withhold from these amounts any sum the Procurement Officer determines to be necessary to protect the State against loss because of outstanding liens or claims of former lien holders.

(g) If, after termination, it is determined that the Contractor was not in default, or that the default was excusable, the rights and obligations of the parties shall, if the contract contains a clause providing for termination for convenience of the State, be the same as if the termination had been issued for the convenience of the State. If, in the foregoing circumstances, this contract does not contain a clause providing for termination for convenience of the State, the contract shall be adjusted to compensate for such termination and the contract modified accordingly subject to the contractor's rights under the Disputes clause.

(h) The rights and remedies of the State in this clause are in addition to any other rights and remedies provided by law or under this contract. [07-7B075-1]

## **ILLEGAL IMMIGRATION (NOV. 2008)**

(An overview is available at [www.procurement.sc.gov](http://www.procurement.sc.gov)) By signing your offer, you certify that you will comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws and agree to provide to the State upon request any documentation required to establish either: (a) that Title 8, Chapter 14 is inapplicable to you and your subcontractors or sub-subcontractors; or (b) that you and your subcontractors or sub-subcontractors are in compliance with Title 8, Chapter 14. Pursuant to Section 8-14-60, "A person who knowingly makes or files any false, fictitious, or fraudulent document, statement, or report pursuant to this chapter is guilty of a felony, and, upon conviction, must be fined within the discretion of the court or imprisoned for not more than five years, or both." You agree to include in any contracts with your subcontractors language requiring your subcontractors to (a) comply with the applicable requirements of Title 8, Chapter 14, and (b) include in their contracts with the sub-subcontractors language requiring the sub-subcontractors to comply with the applicable requirements of Title 8, Chapter 14. [07-7B097-1]

## **INDEMNIFICATION -- THIRD PARTY CLAIMS (NOV 2011)**

Notwithstanding any limitation in this agreement, and to the fullest extent permitted by law, Contractor shall defend and hold harmless Indemnitees for and against any and all suits or claims of any character (and all related damages, settlement payments, attorneys' fees, costs, expenses, losses or liabilities) by a third party which are attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property arising out of or in connection with the goods or services acquired hereunder or caused in whole or in part by any act or omission of contractor, its subcontractors, their employees, workmen, servants, agents, or anyone directly or indirectly employed by them or anyone for whose acts any of them may be liable, regardless of whether or not caused in part by an Indemnatee, and whether or not such claims are made by a third party or an Indemnatee; however, if an Indemnatee's negligent act or omission is subsequently determined to be the sole proximate cause of a suit or claim, the Indemnatee shall not be entitled to indemnification hereunder. Contractor shall be given timely written notice of any suit or claim. Contractor's obligations hereunder are in no way limited by any protection afforded under workers' compensation acts, disability benefits acts, or other employee benefit acts.

This clause shall not negate, abridge, or reduce any other rights or obligations of indemnity which would otherwise exist. The obligations of this paragraph shall survive termination, cancelation, or expiration of the parties' agreement. This provision shall be construed fairly and reasonably, neither strongly for nor against either party, and without regard to any clause regarding insurance. As used in this clause, "Indemnitees" means the State of South Carolina, its instrumentalities, agencies, departments, boards, political subdivisions and all their respective officers, agents and employees. [07-7B100-2]

### **LICENSES AND PERMITS (JAN 2006)**

During the term of the contract, the Contractor shall be responsible for obtaining, and maintaining in good standing, all licenses (including professional licenses, if any), permits, inspections and related fees for each or any such licenses, permits and /or inspections required by the State, county, city or other government entity or unit to accomplish the work specified in this solicitation and the contract. [07-7B115-1]

### **OWNERSHIP OF DATA and MATERIALS (JAN 2006)**

All data, material and documentation prepared for the state pursuant to this contract shall belong exclusively to the State. [07-7B125-1]

### **PRICE ADJUSTMENTS (JAN 2006)**

(1) Method of Adjustment. Any adjustment in the contract price made pursuant to a clause in this contract shall be consistent with this Contract and shall be arrived at through whichever one of the following ways is the most valid approximation of the actual cost to the Contractor (including profit, if otherwise allowed):

- (a) by agreement on a fixed price adjustment before commencement of the pertinent performance or as soon thereafter as practicable;
- (b) by unit prices specified in the Contract or subsequently agreed upon;
- (c) by the costs attributable to the event or situation covered by the relevant clause, including profit if otherwise allowed, all as specified in the Contract; or subsequently agreed upon;
- (d) in such other manner as the parties may mutually agree; or,
- (e) in the absence of agreement by the parties, through a unilateral initial written determination by the Procurement Officer of the costs attributable to the event or situation covered by the clause, including profit if otherwise allowed, all as computed by the Procurement Officer in accordance with generally accepted accounting principles, subject to the provisions of Title 11, Chapter 35, Article 17 of the S.C. Code of Laws.

(2) Submission of Price or Cost Data. Upon request of the Procurement Officer, the contractor shall provide reasonably available factual information to substantiate that the price or cost offered, for any price adjustments is reasonable, consistent with the provisions of Section 11-35-1830. [07-7B160-1]

### **PRICE ADJUSTMENTS -- LIMITED BY CPI "OTHER GOODS and SERVICES" (JAN 2006)**

Upon request and adequate justification, the Procurement Officer may grant a price increase up to, but not to exceed, the unadjusted percent change for the most recent 12 months for which data is available, that is not subject to revision, in the Consumer Price Index (CPI) for all urban consumers (CPI-U), "Other Goods & Services" for services, as determined by the Procurement Officer. The Bureau of Labor and Statistics publishes this information on the web at [www.bls.gov](http://www.bls.gov) [07-7B175-1]

### **PRICING DATA -- AUDIT -- INSPECTION (JAN 2006)**

[Clause Included Pursuant to Section 11-35-1830, - 2210, & -2220] (a) Cost or Pricing Data. Upon Procurement Officer's request, you shall submit cost or pricing data, as defined by 48 C.F.R. Section 2.101 (2004), prior to either (1) any award to contractor pursuant to 11-35-1530 or 11-35-1560, if the total contract price exceeds \$500,000, or (2) execution of a change order or contract modification with contractor which exceeds \$100,000. Your price, including profit or fee, shall be adjusted to exclude any significant sums by which the state finds that such price was increased because you furnished cost or pricing data that was inaccurate, incomplete, or not current as of the date agreed upon between parties. (b) Records Retention. You shall maintain your records for three years from the date of final payment, or longer if requested by the chief Procurement Officer. The state may audit your records at reasonable times and places. As used in this subparagraph (b), the term "records" means any books or records that relate to cost or pricing data submitted pursuant to this clause. In addition to the obligation stated in this subparagraph (b), you shall retain all records and allow any audits provided for by 11-35-2220(2). (c) Inspection. At reasonable times, the state may inspect any part of your place of business which is related to performance of the work. (d) Instructions Certification. When you submit data pursuant to subparagraph (a), you shall (1) do so in accordance with the instructions appearing in Table 15-2 of 48 C.F.R. Section 15.408 (2004) (adapted as necessary for the state context), and (2) submit a Certificate of Current Cost or Pricing Data, as prescribed by 48 CFR Section 15.406-2(a) (adapted as necessary for the state context). (e) Subcontracts. You shall include the above text of this clause in all of your subcontracts. (f) Nothing in this clause limits any other rights of the state. [07-7B185-1]

#### **PRIVACY -- WEB SERVICES (JAN 2006)**

You agree that any information acquired by you about individuals or businesses that is available to you as a result of your performance of this contract shall not be retained beyond the end of the term of the contract without the express written consent of the government. Such information shall never be sold, traded, or released to another entity, including affiliates, and shall not be used for any purpose other than performing this contract. Upon request, contractor shall provide written confirmation of compliance with this clause. [07-7B195-1]

#### **RELATIONSHIP OF THE PARTIES (JAN 2006)**

Neither party is an employee, agent, partner, or joint venturer of the other. Neither party has the right or ability to bind the other to any agreement with a third party or to incur any obligation or liability on behalf of the other party. [07-7B205-1]

#### **TERM OF CONTRACT -- EFFECTIVE DATE / INITIAL CONTRACT PERIOD (JAN 2006)**

The effective date of this contract is the first day of the Maximum Contract Period as specified on the final statement of award. The initial term of this agreement is 1 years, 0months, 0days from the effective date. Regardless, this contract expires no later than the last date stated on the final statement of award. [07-7B240-1]

#### **TERM OF CONTRACT -- OPTION TO RENEW (JAN 2006)**

At the end of the initial term, and at the end of each renewal term, this contract shall automatically renew for a period of 1year(s), 0month(s), and 0day(s), unless contractor receives notice that the state elects not to renew the contract at least thirty (30) days prior to the date of renewal. Regardless, this contract expires no later than the last date stated on the final statement of award. [07-7B245-1]

#### **TERM OF CONTRACT -- TERMINATION BY CONTRACTOR (JAN 2006)**

Contractor may terminate this contract at the end of the initial term, or any renewal term, by providing the Procurement Officer notice of its election to terminate under this clause at least 150 days prior to the expiration of the then current term. [07-7B250-1]

#### **TERMINATION FOR CONVENIENCE (JAN 2006)**

(1) Termination. The Procurement Officer may terminate this contract in whole or in part, for the convenience of the State. The Procurement Officer shall give written notice of the termination to the contractor specifying the part of the contract terminated and when termination becomes effective.

(2) Contractor's Obligations. The contractor shall incur no further obligations in connection with the terminated work and on the date set in the notice of termination the contractor will stop work to the extent specified. The contractor shall also terminate outstanding orders and subcontracts as they relate to the terminated work. The contractor shall settle the liabilities and claims arising out of the termination of subcontracts and orders connected with the terminated work. The Procurement Officer may direct the contractor to assign the contractor's right, title, and interest under terminated orders or subcontracts to the State. The contractor must still complete the work not terminated by the notice of termination and may incur obligations as are necessary to do so.

(3) Right to Supplies. The Procurement Officer may require the contractor to transfer title and deliver to the State in the manner and to the extent directed by the Procurement Officer: (a) any completed supplies; and (b) such partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans, drawings, information, and contract rights (hereinafter called "manufacturing material") as the contractor has specifically produced or specially acquired for the performance of the terminated part of this contract. The contractor shall, upon direction of the Procurement Officer, protect and preserve property in the possession of the contractor in which the State has an interest. If the Procurement Officer does not exercise this right, the contractor shall use best efforts to sell such supplies and manufacturing materials in accordance with the standards of Uniform Commercial Code Section 2-706. Utilization of this Section in no way implies that the State has breached the contract by exercise of the Termination for Convenience Clause.

(4) Compensation. (a) The contractor shall submit a termination claim specifying the amounts due because of the termination for convenience together with cost or pricing data required by Section 11-35-1830 bearing on such claim. If the contractor fails to file a termination claim within one year from the effective date of termination, the Procurement Officer may pay the contractor, if at all, an amount set in accordance with Subparagraph (c) of this Paragraph.

(b) The Procurement Officer and the contractor may agree to a settlement and that the settlement does not exceed the total contract price plus settlement costs reduced by payments previously made by the State, the proceeds of any sales of supplies and manufacturing materials under Paragraph (3) of this clause, and the contract price of the work not terminated;

(c) Absent complete agreement under Subparagraph (b) of this Paragraph, the Procurement Officer shall pay the contractor the following amounts, provided payments agreed to under Subparagraph (b) shall not duplicate payments under this Subparagraph:

(i) contract prices for supplies or services accepted under the contract;

(ii) costs reasonably incurred in performing the terminated portion of the work less amounts paid or to be paid for accepted supplies or services;

(iii) reasonable costs of settling and paying claims arising out of the termination of subcontracts or orders pursuant to Paragraph (2) of this clause. These costs must not include costs paid in accordance with Subparagraph (c)(ii) of this paragraph;

(iv) any other reasonable costs that have resulted from the termination. The total sum to be paid the contractor under this Subparagraph shall not exceed the total contract price plus the reasonable settlement costs of the contractor reduced by the amount of payments otherwise made, the proceeds of any sales of supplies and manufacturing materials under Subparagraph (b) of this Paragraph, and the contract price of work not terminated.

(d) Contractor must demonstrate any costs claimed, agreed to, or established under Subparagraphs (b) and (c) of this Paragraph using its standard record keeping system, provided such system is consistent with any applicable Generally Accepted Accounting Principles.

(5) Contractor's failure to include an appropriate termination for convenience clause in any subcontract shall not (i) affect the state's right to require the termination of a subcontract, or (ii) increase the obligation of the state beyond what it would have been if the subcontract had contained an appropriate clause.

[07-7B265-1]

## **VIII. BIDDING SCHEDULE / PRICE-BUSINESS PROPOSAL**

**See Section IV INFORMATION FOR OFFERORS TO SUBMIT, INFORMATION FOR OFFERORS TO SUBMIT--EVALUATION, second paragraph Price Proposal (page 31) and Item D Price Proposal (page 32).**

## IX. ATTACHMENTS TO SOLICITATION

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### NONRESIDENT TAXPAYER REGISTRATION AFFIDAVIT INCOME TAX WITHHOLDING

#### IMPORTANT TAX NOTICE - NONRESIDENTS ONLY

Withholding Requirements for Payments to Nonresidents: Section 12-8-550 of the South Carolina Code of Laws requires persons hiring or contracting with a nonresident conducting a business or performing personal services of a temporary nature within South Carolina to withhold 2% of each payment made to the nonresident. The withholding requirement does not apply to (1) payments on purchase orders for tangible personal property when the payments are not accompanied by services to be performed in South Carolina, (2) nonresidents who are not conducting business in South Carolina, (3) nonresidents for contracts that do not exceed \$10,000 in a calendar year, or (4) payments to a nonresident who (a) registers with either the S.C. Department of Revenue or the S.C. Secretary of State and (b) submits a Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to the person letting the contract.

The withholding requirement applies to every governmental entity that uses a contract ("Using Entity"). Nonresidents should submit a separate copy of the Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to every Using Entity that makes payment to the nonresident pursuant to this solicitation. Once submitted, an affidavit is valid for all contracts between the nonresident and the Using Entity, unless the Using Entity receives notice from the Department of Revenue that the exemption from withholding has been revoked.

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Section 12-8-540 requires persons making payment to a nonresident taxpayer of rentals or royalties at a rate of \$1,200.00 or more a year for the use of or for the privilege of using property in South Carolina to withhold 7% of the total of each payment made to a nonresident taxpayer who is not a corporation and 5% if the payment is made to a corporation. Contact the Department of Revenue for any applicable exceptions.

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For information about other withholding requirements (e.g., employee withholding), contact the Withholding Section at the South Carolina Department of Revenue at 803-898-5383 or visit the Department's website at: [www.sctax.org](http://www.sctax.org)

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This notice is for informational purposes only. This agency does not administer and has no authority over tax issues. All registration questions should be directed to the License and Registration Section at 803-898-5872 or to the South Carolina Department of Revenue, Registration Unit, Columbia, S.C. 29214-0140. All withholding questions should be directed to the Withholding Section at 803-896-1420.

PLEASE SEE THE "NONRESIDENT TAXPAYER REGISTRATION AFFIDAVIT INCOME TAX WITHHOLDING" FORM (FORM NUMBER I-312) LOCATED AT:

<http://www.sctax.org/Forms+and+Instructions/withholding/default.htm>  
[09-9005-1]

## OFFEROR'S CHECKLIST (JUN 2007)

### OFFEROR'S CHECKLIST -- AVOID COMMON BID/PROPOSAL MISTAKES

Review this checklist prior to submitting your bid/proposal.

If you fail to follow this checklist, you risk having your bid/proposal rejected.

- Do not include any of your standard contract forms!
- Unless expressly required, do not include any additional boilerplate contract clauses.
- Reread your entire bid/proposal to make sure your bid/proposal does not take exception to any of the state's mandatory requirements.
- Make sure you have properly marked all protected, confidential, or trade secret information in accordance with the instructions entitled: SUBMITTING CONFIDENTIAL INFORMATION. **DO NOT mark your entire bid/proposal as confidential, trade secret, or protected! Do not include a legend on the cover stating that your entire response is not to be released!**
- Have you properly acknowledged all amendments? Instructions regarding how to acknowledge an amendment should appear in all amendments issued.
- Make sure your bid/proposal includes a copy of the solicitation cover page. Make sure the cover page is signed by a person that is authorized to contractually bind your business.
- Make sure your Bid/proposal includes the number of copies requested.
- Check to ensure your Bid/proposal includes everything requested!
- If you have concerns about the solicitation, do not raise those concerns in your response! **After opening, it is too late! If this solicitation includes a pre-bid/proposal conference or a question & answer period, raise your questions as a part of that process!** Please see instructions under the heading "submission of questions" and any provisions regarding pre-bid/proposal conferences.

[09-9010-1]

# **OFFICE OF COMMUNITY ALTERNATIVES**

## **GEORGETOWN MARINE INSTITUTE**

### **ATTACHMENTS**

**STATE STANDARDS**

**FOR**

**RESIDENTIAL SERVICES**

## GROUP CARE INTENSIVE SERVICES

### DEFINITION AND AUTHORIZATION

**Definition:** Group Care Intensive Services (GCIS) provides lodging, food, and the attentive and responsible care of children. GCIS are highly structured residential services having intensive staff supervision and programs for children who are experiencing relational or behavioral problems and are not able to function successfully in a less restrictive community environment. The program must be operational 24 hours per day, seven days per week, 365 days per year. **Temporary closings, except in emergency situations, are not allowable.**

The goal of the GCIS is to enable children to overcome their problems to the degree that they may be safely stepped down to a less restrictive environment. Intensive management refers to the level of supervision and intensity of programming required to manage children who present severe behavior management problems. Programming is tailored to the needs of the children served.

Providers shall be responsible for the provision of GCIS services and ensuring that each child's physical, social, emotional, educational/vocational, nutritional, spiritual/cultural and permanency needs are met.

**Authorization:** These services must be authorized by a designated referring State agency. Services may be recommended for a child who currently meets both of the following criteria for this level of care:

- The child is experiencing serious to severe relational or behavioral problems.
- The child is not able to function successfully in a less restrictive environment.

The designated referring State agency shall supply the group care intensive services provider with a written authorization for placement. Faxed or electronic copies of the authorization for placement are acceptable and should be received within 10 days of placement.

### STAFF REQUIREMENTS, SUPERVISION, AND RATIOS

**Staff Requirements:** The Group Care Intensive Services provider shall ensure that all staff meets the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30.

There must be a Human Services Professional (HSP) who is responsible for providing and/or coordinating services for each child's care. This involvement shall include an assessment, development and signing of the care plan, and periodic re-confirmation of the appropriateness of care.

Program components shall be rendered by the HSP or by staff under the supervision of the HSP. The following standards must be met:

- The HSP shall meet the standards as defined under Human Services Professional in the Standards Applicable to All Group Care Providers, Staff Requirements Section.
- The direct care staff must meet all DSS licensing, training and education requirements.
- The staff shall be engaged in child-centered activities during program hours.

Refer to the Standards Applicable to All Group Care Providers, Staff Requirements Section for more specific requirements.

**Supervision:** Services shall be provided by or directly supervised by the HSP. The HSP has responsibility for evaluating, assessing, and the provision of all essential tasks for children who are receiving care.

The HSP shall be available for supervision and discussion during program hours to ensure that children are receiving care in a safe, efficient manner. Those hours must normally be scheduled at a time the children are expected to be awake and at the program. The HSP must spend a portion of his/her time watching and interacting with each child. These individual sessions will occur at a minimum of two times per week and shall be documented in the child's summary notes.

The HSP shall meet at least weekly with direct care staff either individually or in groups to discuss specific children's cases in order to monitor the child's behavioral, social, emotional, educational, vocational, nutritional, spiritual, cultural and permanency needs. This meeting will be documented in the child's summary notes.

**Staff-to-Children Ratios:**

HSP Ratio - One HSP is required for each 10 children.

Program Hours - The staff-to-child ratio shall be a minimum of one HSP or direct care staff to five children during program hours. Staff shall be physically available on-site at the program. There must be staff designated as "on-call" that are available for emergencies.

Sleeping hours - All of the following conditions must be met:

- A minimum of two HSP or direct care staff must be present in each cottage/residence. One staff member must be awake at all times. On-call staff must be available for emergencies.
- A minimum ratio of one HSP or direct care staff to seven children must be maintained during sleeping hours in each cottage/residence.

Alternative Settings – For Group Care Intensive Services provided in approved alternative settings during sleeping hours all of the following conditions shall apply:

- There shall be a minimum of two staff physically present in each campsite.
- There shall be one awake staff member who rotates between campsites. This identified staff shall conduct routine, random checks of each campsite throughout the night. The program must maintain documentation to show that such checks were conducted, including the status of the campsite at each check.
- The minimum staff-to-child ratio in each campsite shall be one staff to every seven children.
- "On-call" staff shall be available to respond to emergencies.
- Administrators of these programs shall ensure that safety and environmental issues are adequately addressed.

**PROGRAM COMPONENTS**

Each Group Care Intensive Service program must have a structure in place that clearly supports the development of desired behaviors, skills, and emotional growth through either a level system or another milieu or approach. Services must be identifiable as structured activities and demonstrated by a posted schedule of activities and services provided within the program. The structured programming and program components reflect behavioral, instructional, teaching elements and support the level of

care provided. Program components shall be rendered by the HSP or by staff under the supervision of the HSP.

The services comprising the program components must be provided to help ensure that the child receives the needed services and supervision necessary for children at this level of care. The frequency of services rendered must be provided in accordance to these guidelines and as listed on the child's individual care plan. The behavior management, life skills and independence, recreation/leisure and general care program components must be provided daily. Documentation in the Progress Summary Notes should reflect the child's participation in and attainment of the skills learned in each program component.

The services must also be consistent with the child's needs and incorporated into the child's individual care plan. The services listed below are components of Group Care Intensive Services:

**Intake Assessment and Reassessments:** The assessment must reflect an understanding of the child and family's strengths and needs, observation of the child's behavior, and identification of problem areas. Assessments will be used in developing care plans. A reassessment will be completed when there is a substantial change in the child's functioning and/or marked increase in personal distress.

**Initial and ongoing care planning:** Care plans and service delivery must be individualized to the needs, strengths, and resources of the child and family and reflect the reason(s) for placement. Refer to the Standards Applicable to All Group Care Providers, Individual Care Plan Section for more specific requirements.

**Discharge, After-care, Transitional Services, and Permanency Planning:** Preparation of the child and family for discharge and aftercare should begin at intake. The referring State agency and the provider shall have continuous and guided interaction with family members, significant others for the purpose of transitioning the child back to the home and community. Permanency planning begins at the admission process and continues through discharge.

**Behavior Management:** The principles and techniques used by a program to assist a child in facilitating self-control, addressing inappropriate behavior and achieving positive outcomes in a constructive and safe manner. Behavior Management will be provided continuously to the child and be based on the child's individual needs.

Behavior Management should include interventions used to change specific behaviors. This could include providing re-direction of behavior or face-to-face interventions between the program staff and the child. In addition, behavior management can be incorporated into the GCIS structure, offered to groups of children, provided to individual children, or include techniques shared with the families of children being served in the residential program. Behavior Management includes:

- supportive interactions to assist the child in solving identified problems and reinforce learned skills,
- teaching interpersonal conflict resolution, coping skills,
- working with the child and family on identified problems and thus helps strengthen the family unit.

**Crisis Intervention:** An intensive time-limited service provided by the staff face-to-face with the child following abrupt or substantial changes in the child's functioning and/or marked increase in personal distress. The interventions are often needed to prevent further decompensation or escalation.

**Life Skills and Independence:** Assisting children and adolescents according to their age, developmental and cognitive abilities to develop healthy life skills to achieve successful independence in the following areas:

1. **Daily Living Skills** which includes skills areas used on a daily basis: nutrition, menu planning, grocery shopping, meal preparation, dining decorum, kitchen clean up and food storage, home management and home safety.
2. **Housing and Community Resources** to assist youth in making a positive transition into the community. This may include housing, transportation and community resources.
3. **Money Management** to help youth make sound decisions, both now and in the future. This may include exploring beliefs about money and information about savings, income tax, banking and credit, budgeting and spending plans and consumer skills.
4. **Self-Care** to include skills that promote a youth's physical and emotional development. This may include personal hygiene, health, drugs and tobacco education and information about human sexuality and making safe choices.
5. **Social Development** focusing on relating to others now and in the future. This may include personal development, cultural awareness, communication and relationships education and training.
6. **Work and Study Skills** to address the skills needed to help youth complete their educational programs and pursue careers of interest. This may include career planning, employment, decision making and study skills.

Life skills will be provided continuously to the child.

**Recreation and Leisure:** Provides for a daily program of indoor and outdoor recreational and leisure activities. In addition to providing activities on site, the provider shall utilize the community's cultural, social, and recreational resources whenever possible and appropriate. Children's strengths, needs and interest should be addressed when developing recreational and leisure activities. Children are not expected to spend a substantial portion of their leisure time watching television or playing video/computer games.

The program must ensure that all activities are age appropriate for the ages of the children being served. The program must maintain and/or provide access to a variety of recreational and leisure equipment and supplies such as games, sporting equipment, reading materials and art supplies.

Recreation and leisure activities must provide opportunities for children to participate in both group and individual events. Recreational and leisure activities must be supervised by provider staff. For children participating in community programs, the provider must ensure sufficient and appropriate supervision for the children in attendance.

**Educational and Vocational Services:** It is expected that the majority of youth will be enrolled in public school. If the residential program operates its own private school, the residential program must provide an educational program that satisfies the requirements set forth by the South Carolina Department of Education (SCDE). The SCDE must make this determination through monitoring, written reports, on-site visits, and other processes and activities. Children/youth with disabilities placed in or referred to the residential program by a public or state agency and placed in a private school operated by the residential program must receive a free appropriate public education (FAPE) as defined by the Individuals with Disabilities Education Act (IDEA).

For those youth who legally exited high school prior to completing a state-issued diploma, achieved a state-issued high school diploma, or achieved a GED, the program must provide access to academic or vocational classes or opportunities that will prepare them to lead self-sufficient lives. Note that all youth who have not achieved a state-issued high school diploma have a right to return to school through age 21 to continue their education.

For those youth who have not completed high school or who have achieved a high school diploma or GED, the program must provide access to academic or vocational classes/opportunities that will prepare them to lead self-sufficient lives.

Educational Services - Services provided shall include:

- Documentation of the child's academic progress.
- Documentation of each child's attendance, courses and grades at the time of withdrawal from school.
- Placement of the child in an educational program.
- Support of the youth's education by participation in juvenile support team meetings, Individual Education Planning (IEP) meetings, parent/teacher conferences and disciplinary meetings.
- Monitoring of the child's educational progress at least monthly by contact with the local school personnel.
- Notifying and inviting parents/guardians/case workers, as appropriate to attend any school-related conferences.
- Ensuring that any child experiencing difficulty in school is considered for assistance.
- Providing each child structured study time and home work assistance.
- Providing opportunities for participation in school-related extra-curricular activities.

Vocational Services: For youth not required by law to be enrolled in secondary education, planning and services will focus on the development of life skills, basic academic skills, GED preparation, and/or vocational skills. Youth who have graduated from high school or completed the GED, may participate in a work program or engage in other similar educational enriching activities.

Vocational services may include the provision or access to the following:

- Counseling and guidance
- Job search and placement assistance
- Vocational and other training services
- On-the-job or personal assistance services to teach good work habits
- Supportive employment services
- Technical assistance for self-employment
- Transportation, if needed

General Care: In addition to the program components listed within this section and within the licensing regulations, providers must also ensure that the children receiving services within the residential program also receive services daily which focus on the following:

Physical Care: Physical Care includes access to all health services pertaining to the body. Some elements of physical care include: the acquisition of nutritional services to ensure health, physical, and emotional well being along with the medication monitoring, documenting, administering medication by direct care staff trained in medication administration.

**Social Care:** The provision of an environment in which the child's relationships with peers, staff, significant other, and community are improved through the use of recreational and leisure activities.

**Emotional Care:** Emotional care includes a support network that recognizes a variety of emotions that are accompanied by physiological or psychological changes.

## **DOCUMENTATION**

Each child's record must contain adequate documentation to support the services rendered and billed. Documentation of the services provided to the child, the child's responsiveness, and the interaction and involvement of the staff with the child should justify and support the services billed. Refer to the Standards Applicable to All Group Care Providers, Records/Documentation Section for more specific requirements.

In order for Group Care Intensive Services to be billed for any calendar day, services must have been rendered directly to the child during the day. The designated referring State agency should not be billed for days in which the child is absent or away for the full day unless the guidelines covering absentee days are met.

The State agencies will continue to acknowledge and reimburse absentee days for out-of-home medical care and transition days as previously outlined in the Absentee Day Policy. Unless otherwise specified by the referring State agency, the number of days shall remain as specified; however, the State agency, upon timely notification to the provider, may elect to shorten the time they will reimburse under each type of leave depending on the child's needs and circumstances. Referring State agencies require notification of planned absences in advance and notification of emergency absences within 24 hours.

## **GROUP CARE INTERMEDIATE SERVICES**

### **DEFINITION AND AUTHORIZATION**

**Definition:** Group Care Intermediate Services (GCMS) provides lodging, food, and the attentive and responsible care of children. GCMS are highly structured residential services having intensive staff supervision and programs for children who are experiencing relational or behavioral problems and are not able to function successfully in a less restrictive community environment. The program must be operational 24 hours per day, seven days per week, 365 days per year. **Temporary closings, except in emergency situations, are not allowable.**

The goal of the GCMS is to enable children to overcome their problems to the degree that they may be safely stepped down to a less restrictive environment. Intermediate management refers to the level of supervision and intensity of programming required to manage children who present less intensive problems than those in a group care maximum services program. Programming is tailored to the needs of the children served. In addition to the programming and structure, the children receive 24-hour supervision, during 16 hours of which staff members are awake.

Providers shall be responsible for the provision of GCMS and ensuring that each child's physical, social, emotional, educational/vocational, nutritional, spiritual/cultural and permanency needs are met.

**Authorization:** These services must be authorized by a designated referring State agency. Services may be recommended for a child who currently meets both of the following criteria for this level of care:

- The child is experiencing moderate to serious relational or behavioral problems.
- The child is not able to function successfully in a less restrictive environment.

The designated referring State agency shall supply the group care intermediate management services provider with a written authorization for placement. Faxed or electronic copies of the authorization for placement are acceptable and should be received within 10 days of placement.

## **STAFF REQUIREMENTS, SUPERVISION, AND RATIOS**

**Staff Requirements:** The Group Care Intermediate Services provider shall ensure that all staff meet the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30.

There must be a Human Services Professional (HSP) who is responsible for providing and/or coordinating services for each child's care. This involvement shall include an assessment, development and signing of the care plan, and periodic re-confirmation of the appropriateness of care.

Program components shall be rendered by the HSP or by staff under the supervision of the HSP. The following standards must be met:

- The HSP shall meet the standards as defined under Human Services Professional in the Standards Applicable to All Group Care Providers, Staff Requirements Section.
- The direct care staff must meet all DSS licensing, training and education requirements.
- The staff shall be engaged in child-centered activities during program hours.

Refer to the Standards Applicable to All Group Care Providers, Staff Requirements Section for more specific requirements.

**Supervision:** Services shall be provided by or directly supervised by the HSP. The HSP has responsibility for evaluating, assessing, and the provision of all essential tasks for children who are receiving care.

The HSP shall be available for supervision and discussion during program hours to ensure that children are receiving care in a safe, efficient manner. Those hours must normally be scheduled at a time the children are expected to be awake and at the program. The HSP must spend a portion of his/her time watching and interacting with each child. These individual sessions will occur at a minimum of once per week and shall be documented in the child's summary notes.

The HSP shall meet at least weekly with direct care staff either individually or in groups to discuss specific children's cases in order to monitor the child's behavioral, social, emotional, educational, vocational, nutritional, spiritual, cultural and permanency needs. This meeting will be documented in the child's summary notes.

### **Staff-to-Children Ratios:**

**HSP Ratio** - One HSP is required for each 16 children.

Program Hours - The staff-to-child ratio shall be a minimum of one HSP or direct care staff to eight children during program hours. Staff shall be physically available on-site at the program. There must be staff designated as “on-call” that are available for emergencies.

Sleeping hours - All of the following conditions must be met:

- A minimum of two HSP or direct care staff must be present in each cottage/residence. State agencies prefer an awake staff. On-call staff must be available for emergencies.
- A minimum ratio of one HSP or direct care staff to ten children must be maintained during sleeping hours in each cottage/residence.

Alternative Settings – For Group Care Intermediate Services provided in an approved alternative setting, during sleeping hours, all of the following conditions shall apply:

- There shall be a minimum of one staff physically present in each campsite.
- There shall be one awake staff member who rotates between campsites. This identified staff shall conduct routine, random checks of each campsite throughout the night. The program must maintain documentation to show that such checks were conducted, including the status of the campsite at each check.
- The minimum staff-to-child ratio in each campsite shall be one staff to every ten children.
- “On-call” staff shall be available to respond to emergencies.
- Administrators of these programs shall ensure that safety and environmental issues are adequately addressed.

## **PROGRAM COMPONENTS**

Each Group Care Intermediate Services program must have a structure in place that clearly supports the development of desired behaviors, skills, and emotional growth through either a level system or another milieu or approach. . Services must be identifiable as structured activities and demonstrated by a posted schedule of activities and services provided within the program. The structured programming and program components reflect behavioral, instructional, teaching elements and support the level of care provided Program components shall be rendered by the HSP or by staff under the supervision of the HSP.

The services comprising the program components must be provided to help ensure that the child receives the needed services and supervision necessary for children at this level of care. The frequency of services rendered must be provided in accordance to these guidelines and as listed on the child’s individual care plan. The behavior management, life skills and independence, recreation/leisure and general care program components must be provided daily. Documentation in the Progress Summary Notes should reflect the child’s participation in and attainment of the skills learned in each program component.

The services must also be consistent with the child’s needs and incorporated into the child’s individual care plan. The services listed below are components of Group Care Intermediate Services:

**Intake Assessment and Reassessments:** The assessment must reflect and understanding of the child and family’s strengths and needs, observation of the child’s behavior, and identification of problem areas. Assessments will be used in developing care plans. A reassessment will be completed when there is a substantial change in the child’s functioning and/or marked increase in personal distress.

**Initial and ongoing care planning:** Care plans and service delivery must be individualized to the needs, strengths, and resources of the child and family and reflect the reason(s) for placement. Refer to the Standards Applicable to All Group Care Providers, Individual Care Plan Section for more specific requirements.

**Discharge, After-care, Transitional Services, and Permanency Planning:** Preparation of the child and family for discharge and aftercare should begin at intake. The referring State agency and the provider shall have continuous and guided interaction with family members, significant others for the purpose of transitioning the child back to the home and community. Permanency planning begins at the admission process and continues through discharge.

**Behavior Management:** The principles and techniques used by a program to assist a child in facilitating self-control, addressing inappropriate behavior and achieving positive outcomes in a constructive and safe manner. Behavior Management will be provided continuously to the child and be based on the child's individual needs.

Behavior Management should include interventions used to change specific behaviors. This could include providing re-direction of behavior or face-to-face interventions between the program staff and the child. In addition, behavior management can be incorporated into the GCMS structure, offered to groups of children, provided to individual children, or include techniques shared with the families of children being served in the residential program. Behavior Management includes:

- supportive interactions to assist the child in solving identified problems and reinforce learned skills,
- teaching interpersonal conflict resolution, coping skills,
- working with the child and family on identified problems and thus helps strengthen the family unit.

**Crisis Intervention:** An intensive time-limited service provided by the staff face-to-face with the child following abrupt or substantial changes in the child's functioning and/or marked increase in personal distress. The interventions are often needed to prevent further decompensation or escalation.

**Life Skills and Independence:** Assisting children and adolescents according to their age, developmental and cognitive abilities to develop healthy life skills to achieve successful independence in the following areas:

1. Daily Living Skills which includes skills areas used on a daily basis: nutrition, menu planning, grocery shopping, meal preparation, dining decorum, kitchen clean up and food storage, home management and home safety.
2. Housing and Community Resources to assist youth in making a positive transition into the community. This may include housing, transportation and community resources.
3. Money Management to help youth make sound decisions, both now and in the future. This may include exploring beliefs about money and information about savings, income tax, banking and credit, budgeting and spending plans and consumer skills.
4. Self-Care to include skills that promote a child's physical and emotional development. This may include personal hygiene, health, drugs and tobacco education and information about human sexuality and making safe choices.
5. Social Development focusing on relating to others now and in the future. This may include personal development, cultural awareness, communication and relationships education and training.

6. Work and Study Skills to address the skills needed to help children complete their educational programs and pursue careers of interest. This may include career planning, employment, decision making and study skills.

Life skills will be provided continuously to the child.

**Recreation and Leisure:** Provides for a daily program of indoor and outdoor recreational and leisure activities. In addition to providing activities on site, the provider shall utilize the community's cultural, social, and recreational resources whenever possible and appropriate. Children's strengths, needs and interest should be addressed when developing recreational and leisure activities. Children are not expected to spend a substantial portion of their leisure time watching television or playing video/computer games.

The program must ensure that all activities are age appropriate for the ages of the children being served. The program must maintain and/or provide access to a variety of recreational and leisure equipment and supplies such as games, sporting equipment, reading materials and art supplies.

Recreation and leisure activities must provide opportunities for children to participate in both group and individual events. Recreational and leisure activities must be supervised by provider staff. For children participating in community programs, the provider must ensure sufficient and appropriate supervision for the children in attendance.

**Educational and Vocational Services:** It is expected that the majority of youth will be enrolled in public school. If the residential program operates its own private school, the residential program must provide an educational program that satisfies the requirements set forth by the South Carolina Department of Education (SCDE). The SCDE must make this determination through monitoring, written reports, on-site visits, and other processes and activities. Children/youth with disabilities placed in or referred to the residential program by a public or state agency and placed in a private school operated by the residential program must receive a free appropriate public education (FAPE) as defined by the Individuals with Disabilities Education Act (IDEA).

For those youth who legally exited high school prior to completing a state-issued diploma, achieved a state-issued high school diploma, or achieved a GED, the program must provide access to academic or vocational classes or opportunities that will prepare them to lead self-sufficient lives. Note that all youth who have not achieved a state-issued high school diploma have a right to return to school through age 21 to continue their education.

For those youth who have not completed high school or who have achieved a high school diploma or GED, the program must provide access to academic or vocational classes/opportunities that will prepare them to lead self-sufficient lives.

**Educational Services** - Services provided shall include:

- Documentation of the child's academic progress.
- Documentation of each child's attendance, courses and grades at the time of withdrawal from school.
- Placement of the child in an educational program.
- Support of the youth's education by participation in juvenile support team meetings, Individual Education Planning meetings, parent/teacher conferences and disciplinary meetings.

- Monitoring of the child's educational progress at least monthly by contact with the local school personnel.
- Notifying and inviting parents/guardians/case workers, as appropriate to attend any school-related conferences.
- Ensuring that any child experiencing difficulty in school is considered for assistance.
- Providing each child structured study time and home work assistance.
- Providing opportunities for participation in school-related extra-curricular activities.

**Vocational Services:** For youth not required by law to be enrolled in secondary education, planning and services will focus on the development of life skills, basic academic skills, GED preparation, and/or vocational skills. Youth who have graduated from high school or completed the GED, may participate in a work program or engage in other similar educational enriching activities.

Vocational services may include the provision or access to the following:

- Counseling and guidance
- Job search and placement assistance
- Vocational and other training services
- On-the-job or personal assistance services to teach good work habits
- Supportive employment services
- Technical assistance for self-employment
- Transportation, if needed.

**General Care:** In addition to the program components listed within this section and within the licensing regulations, providers must also ensure that the children receiving services within the residential program also receive services daily which focus on the following:

**Physical Care:** Physical Care includes access to all health services pertaining to the body. Some elements of physical care include: the acquisition of nutritional services to ensure health, physical, and emotional well being along with the medication monitoring, documenting, administering medication by direct care staff trained in medication administration.

**Social Care:** The provision of an environment in which the child's relationships with peers, staff, significant other, and community are improved through the use of recreational and leisure activities.

**Emotional Care:** Emotional care includes a support network that recognizes a variety of emotions that are accompanied by physiological or psychological changes.

## **DOCUMENTATION**

Each child's record must contain adequate documentation to support the services rendered and billed. Documentation of the services provided to the child, the child's responsiveness, and the interaction and involvement of the staff with the child should justify and support the services billed. Refer to the Standards Applicable to All Group Care Providers, Records/Documentation Section for more specific requirements.

In order for Group Care Intermediate Services to be billed for any calendar day, services must have been rendered directly to the child during the day. The designated referring State agency should not be billed for days in which the child is absent or away for the full day unless the guidelines covering absentee days are met. The State agencies will continue to acknowledge and reimburse absentee days for out-of-home medical care and transition days as previously outlined in the Absentee Day Policy.

Unless otherwise specified by the referring State agency, the number of days shall remain as specified; however, the State agency, upon timely notification to the provider, may elect to shorten the time they will reimburse under each type of leave depending on the child's needs and circumstances. Referring State agencies require notification of planned absences in advance and notification of emergency absences within 24 hours.

## GROUP CARE INDEPENDENT LIVING SERVICES

### DEFINITION AND AUTHORIZATION

**Definition:** Group Care Independent Living Services (GCILS) involves a range of services provided to youth ages 16 to 21 in a residential setting. Services are designed to improve the quality of life for youths by assisting them to assume responsibility over their lives and to function as actively and independently in the community as possible. GCILS is designed to both strengthen the youth's skills and develop environmental supports necessary to enable them to function independently in the community. **Temporary closings, except in emergency situations, are not allowable.**

GCILS is appropriate for those youths who have demonstrated developmental and emotional readiness based on positive behaviors, personal skills and strengths, ability to develop independence, and for those youths requiring a continuing level of oversight/supervision while learning and developing independent living skills. Services are intended to enable the youth to transition to an independent living environment while encouraging the youth to maintain community tenure, obtain all necessary treatment services, access services from a variety of community programs, and improve the capacity for independent living. Services are provided in the context of a supportive, non-institutional environment in the community and should be offered in a manner that maximizes the youth's responsibility, control, and feelings of self worth, and encourages independence.

GCILS programs are available to youth ages 16 to 21 who need independent living skills provided in a structured environment. These youths may be aging out of a more restrictive placement, be in need of transitional services, or be returning to DSS care after having left the system of care at the age of majority.

The goals of GCILS are to:

1. Reduce problem areas that prevent successful independent living
2. Develop and implement an independent living plan that will identify the skills necessary to function independently and be self-sufficient
3. Develop or increase skills in stress management, decision making, problem solving, and coping
4. Develop or increase basic life skills that contribute to successful independent living
5. Reduce barriers that impede the youth's ability to function independently within the community or independently with non-residential supports by creating realistic opportunities for the youth to a practice/apply the skills listed in 3 and 4
6. Develop a protected living environment for the youth requiring long-term protected care, which promotes development of his/her maximum possible independent living skills and abilities while providing the appropriate oversight and monitoring necessary for the youth to succeed.

Services are provided in a designated cottage on a residential group home campus or a separate group care facility in conjunction with 24-hour monitoring by staff. Staff must be available to youth 24 hours per day, seven days per week.

**Authorization:** These services must be authorized by a designated referring State agency. Services may be recommended for an adolescent who currently meets all of the following criteria for this level of care:

- The youth has relational or behavioral problems that prevent or impede him/her from functioning independently in the community.
- The youth requires GCILS in order to be able to function independently at age of majority.
- The youth requires community services/assistance from agencies in order to maximize his/her level of independence in adult living.

The designated referring State agency shall supply the group care independent living services provider with a written authorization for placement. Faxed or electronic copies of the authorization for placement are acceptable and should be received within 10 days of placement.

## **STAFF REQUIREMENTS, SUPERVISION, AND RATIOS**

**Staff Requirements:** The Group Care Independent Living Services provider shall ensure that all staff meets the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30.

There must be a Human Services Professional (HSP) who is responsible for providing and/or supervising services for each youth's care. This involvement shall include: assessing the youth's current strengths, problem areas, and needed independent living skills; developing and signing an independent living plan; coordinating and integrating services; providing and/or supervising service delivery; consultation with appropriate outside entities; and periodic reconfirmation of the appropriateness of care.

GCILS shall be rendered by or under the supervision of an HSP. The following standards must be met:

- The HSP shall meet the standards as defined under Human Services Professional in the Standards Applicable to All Group Care Providers, Staff Requirements Section.
- The direct care staff must meet all DSS licensing, training and education requirements.

Refer to the Standards Applicable to All Group Care Providers, Staff Requirements Section for more specific requirements

In provision of GCILS, regular contact and face-to-face meetings must occur with the youth in order to facilitate the development of independent living skills. The amount of contact the HSP has with the youth should be based on the youth's assessed problems and needs. The HSP or direct care staff under direct supervision of the HSP must have daily face-to-face contact with the youth as well as provide 24-hour monitoring, seven days per week.

**Supervision:** Services shall be provided by or under the supervision of the HSP. The HSP has responsibility for supervising the performance of the direct care staff, assessing the youth's progress in accomplishing/reaching independent living goals, and supervising the quality and programming of services rendered. The HSP shall be responsible for formulating appropriate discharge plans to ensure the youth's successful and timely discharge to independent living.

The HSP shall be available for supervision and consultation. Regular contact and face-to-face meetings must occur with the youth in order to facilitate the development of independent living skills. GCILS

shall ensure appropriate involvement of an HSP in each youth's care. The HSP's work hours must normally be scheduled at a time the adolescents are expected to be awake, and the HSP must spend a portion of his/her time observing and interacting with them. Consultation services can be used by the HSP to communicate progress made toward independent living and the youth's readiness for transitional/ discharge planning.

The HSP shall meet at a minimum every two weeks with direct care staff to discuss and monitor the youth's needs and progress. This meeting will consist of an overview of the independent living services provided to each youth, the achievement of goals, identification of new problems/needs, and any necessary changes or modifications to the youth's Independent Living Plan. This meeting will be documented in the youth's weekly summary notes.

### **Staff-to-Youth Ratios:**

HSP Ratio- One HSP is required for each 16 youths.

Program Hours – During program hours, one HSP or direct care staff must be available for every eight youths. "Available" means identified staff must be at the group care facility, on the program grounds, or off the program grounds but able to respond to the youth within ten minutes or less. Every youth must know how to and be able to contact available staff at all times. Although 24 hour supervision is not required, the GCILS program should individualize supervision through a level system or individual care plan.

Sleeping Hours – At night, one HSP or direct care staff must be available for every ten youths. "Available" means identified staff must be at the group care facility, on the program grounds, or off the grounds but able to respond to the youth within ten minutes or less. State agencies prefer an awake staff. If a staff member is not physically in the group care facility, a staff member must conduct random nightly checks.

The program must maintain documentation to show that such checks were conducted. On-call staff must be available for emergencies.

## **INDEPENDENT LIVING ASSESSMENT**

After admission of the youth into a GCILS program, the HSP must complete an Independent Living Assessment (ILA) within 30 days. The ILA must be completed before the Independent Living Plan is developed, and it must include the name and birth date of the youth.

The ILA, must be written, signed and dated by the HSP. The youth must be given the opportunity and encouragement to participate in the assessment process unless there are documented reasons why his/her participation is not possible. If the youth does not participate in the ILA process, an explanation must be included in the youth's record.

The ILA must include an assessment by the HSP defining the youth's need for independent living services to include whether or not he/she feels the youth displays adequate self-control, ability, and judgment skills in most situations. Specific elements of this assessment must include the following:

- An assessment of the adolescent's developmental readiness and stage of independence, not his/her chronological age.
- A description of the youth's strengths and needs, including issues that may impede the youth's ability to live and function independently.

- A description of the youth's cognitive abilities and his/her emotional and psychological stability.
- A list of the youth's strengths and needs in relation to educational and vocational areas to include a description of the youth's academic performance to include grade level, diploma or certificate track, and whether served by Special Education or Regular Education.
- A description of the youth's work habits and performance to include any voluntary and/or paid employment; and an indication of whether he/she has been referred to or has been served by vocational rehabilitation.
- A list of both the independent living skills the youth has and those that need to be developed (including but not limited to money management, parenting skills, coping skills, dealing with authority figures, and personal hygiene, etc.).
- A description of the youth's previous placement history to include dates of placement and reasons for discharge.
- A description of the youth's communication skills to include telephone, written and verbal.
- A description of the youth's involvement with his/her family to include the effect this had on the youth.
- A description of the youth's commitment to learning independent living skills and his/her participation in their future planning.

Ongoing assessments of the youth's problems/needs should be conducted by the HSP as needed and involve the youth.

## **PROGRAM COMPONENTS**

Group Care Independent Living Services shall be provided for each youth based on his/her assessed needs. The structured programming and program components reflect behavioral, instructional, teaching elements and support the level of care provided. Program components shall be rendered by the HSP or by staff under the supervision of the HSP.

The purpose of GCILS is to strengthen the youth's skills and develop environmental supports necessary to enable him/her to function independently within the community. The GCILS program must include and be able to provide all components in the service content array.

The HSP shall render the appropriate components within the array of services to the youth depending on his/her assessed needs. The provision of only one component continually to a youth does not constitute the full array of GCILS.

The program shall use a structured system that illustrates how the youth progress through the program and acquire skills needed for independent living. The GCILS services must also be consistent with the youth's needs and incorporated into the youth's Individual Living Plan.

The services comprising the program components must be provided to help ensure that the youth receives the needed services and supervision necessary for youth at this level of care. The frequency of services rendered must be provided in accordance to these guidelines and as listed on the child's individual care plan. The behavior management, life skills and independence, recreation/leisure and general care program components must be provided daily. Documentation in the Progress Summary Notes should reflect the child's participation in and attainment of the skills learned in each program component.

The services listed below are components of Group Care Independent Living Services:

**Independent Living Assessment and Reassessments:** The Independent Living Assessment must be completed for each youth admitted to a GCILS program. Assessments will be used in developing care plans. A reassessment will be completed when there is a substantial change in the youth's functioning and/or marked increase in personal distress. Refer to the Group Care Independent Living Services, Independent Living Assessment Section for more specific requirements.

**Initial and ongoing Independent Living Plans:** The Independent Living Plan (ILP) must be based on the ILA. Refer to the Standards Applicable to All Group Care Providers, Individual Care Plan and Individual Living Plan Section for more specific requirements.

**Discharge, After-care, Transitional Services, and Permanency Planning:** Preparation of the youth for discharge and aftercare should begin at intake. The referring State agency and the provider shall have continuous and guided interaction for the purpose of transitioning the youth to living independently. Permanency planning begins at the admission process and continues through discharge.

**Life Skills and Independence:** assisting the youth according to their age, developmental and cognitive abilities to develop healthy life skills to achieve successful independence. Life skills services for youth 16 and older are aimed at enhancing the youth's ability to develop and demonstrate skills necessary to live independently. These services should focus on reducing emotional and behavioral barriers to skill development in activities of daily living. Services must be offered daily and address the following areas:

1. **Daily Living Skills** which includes skills areas used on a daily basis: nutrition, menu planning, grocery shopping, meal preparation, dining decorum, kitchen clean up and food storage, home management and home safety.
2. **Housing and Community Resources** to assist youth's in making a positive transition into the community. May include locating, financing and maintaining decent, safe, and affordable housing. The use of community resources such as transportation, social services, and medical services should also be addressed.
3. **Money Management** to help the youth make sound decisions, both now and in the future. May include exploring beliefs about money and information about savings, income tax, banking and credit, budgeting and spending plans and consumer skills.
4. **Self-Care** to include skills that promote a youth's physical and emotional development. Self care services may include personal hygiene and grooming, health, drugs and tobacco education and information about human sexuality and making safe choices.
5. **Social Development** which focuses on relating to others now and in the future. This may also include personal development, cultural awareness communication and relationships education and training.
6. **Work and Study Skills** to help the youth complete their educational programs and pursue careers of interest. Work and study skills should also include career planning, employment, decision making, study skills, and developing skills necessary to secure gainful employment and/or self-sufficiency.
7. **Abstract Skills** which includes helping the youth to learn stress management skills, how to deal with authority figures, personal decision-making, problem-solving skills and understanding and coping with a variety of emotions.

These services are aimed at providing the support and assistance needed for the youth to acquire skills necessary to live independently. The GHILS provider should also be available to help: link the

adolescent to vocational skills programs, transporting him/her to a job in the community or assisting with the financial aid process so the adolescent can pursue educational goals.

The GHILS should also access community services/resources as needed.

**Recreation and Leisure:** Provides for a daily program of indoor and outdoor recreational and leisure activities. In addition to providing activities on site, the provider shall utilize the community's cultural, social, and recreational resources whenever possible and appropriate. Adolescent's strengths, needs and interest should be addressed when developing recreational and leisure activities. Youths are not expected to spend a substantial portion of their leisure time watching television or playing video/computer games.

The program must ensure that all activities are age appropriate for the ages of the youths being served. The program must maintain and/or provide access to a variety of recreational and leisure equipment and supplies such as games, sporting equipment, reading materials and art supplies.

Recreation and leisure activities must provide opportunities for youths to participate in both group and individual events. Youths participating in community programs, the provider must ensure sufficient and appropriate supervision for the youths in attendance.

**Educational and Vocational Services:** It is expected that the majority of youth will be enrolled in public school. If the residential program operates its own private school, the residential program must provide an educational program that satisfies the requirements set forth by the South Carolina Department of Education (SCDE). The SCDE must make this determination through monitoring, written reports, on-site visits, and other processes and activities. Children/youth with disabilities placed in or referred to the residential program by a public or state agency and placed in a private school operated by the residential program must receive a free appropriate public education (FAPE) as defined by the Individuals with Disabilities Education Act (IDEA).

For those youth who legally exited high school prior to completing a state-issued diploma, achieved a state-issued high school diploma, or achieved a GED, the program must provide access to academic or vocational classes or opportunities that will prepare them to lead self-sufficient lives. Note that all youth who have not achieved a state-issued high school diploma have a right to return to school through age 21 to continue their education.

For those youth who have not completed high school or who have achieved a high school diploma or GED, the program must provide access to academic or vocational classes/opportunities that will prepare them to lead self-sufficient lives.

**Educational Services** - Services provided shall include:

- Documentation of the child's academic progress.
- Documentation of each child's attendance, courses and grades at the time of withdrawal from school.
- Placement of the child in an educational program.
- Support of the youth's education by participation in juvenile support team meetings, Individual Education Planning (IEP) meetings, parent/teacher conferences and disciplinary meetings.
- Monitoring of the child's educational progress at least monthly by contact with the local school personnel.

- Notifying and inviting parents/guardians/case workers, as appropriate to attend any school-related conferences.
- Ensuring that any child experiencing difficulty in school is considered for assistance.
- Providing each child structured study time and home work assistance.
- Providing opportunities for participation in school-related extra-curricular activities.

**Vocational Services:** For youths not required by law to be enrolled in secondary education, planning and services will focus on the development of life skills, basic academic skills, GED preparation, and/or vocational skills. Youth's who have graduated from high school or completed the GED, may participate in a work program or engage in other similar educational enriching activities.

Vocational services shall include the provision or access to the following:

- Counseling and guidance
- Job search and placement assistance
- Vocational and other training services
- On-the-job or personal assistance services to teach good work habits
- Supportive employment services
- Technical assistance for self-employment
- Transportation, if needed.

**Behavior Management:** The principles and techniques used by a program to assist the youth in facilitating self-control, addressing inappropriate behavior and achieving positive outcomes in a constructive and safe manner. Behavior Management will be provided continuously to the youth and be based on the youth's individual needs.

Behavior Management should include interventions used to change specific behaviors. This could include providing re-direction of behavior or face-to-face interventions between the program staff and the youth. In addition, behavior management can be incorporated into the GCILS structure, offered to groups of youth, provided to individual youths, or include techniques shared with the families of youth being served in the residential program.

Behavior Management includes:

- supportive interactions to assist the youth in solving identified problems and reinforce learned skills,
- teaching interpersonal conflict resolution, coping skills,
- working with the youth and family on identified problems and helps strengthen the family unit.

**General Care:** In addition to the program components listed within this section and within the licensing regulations, providers must also ensure that the youth receiving services within the residential program also receive services which focus on the following:

**Physical Care:** Physical Care includes access to all health services pertaining to the body. Some elements of physical care include: the acquisition of nutritional services to ensure health, physical, and emotional well being along with the medication monitoring, documenting, administering medication by direct care staff trained in medication administration.

**Social Care:** The provision of an environment in which the youth's relationships with peers, staff, significant other, and community are improved through the use of recreational and leisure activities.

**Emotional Care:** Emotional care includes a support network that recognizes a variety of emotions that are accompanied by physiological or psychological changes.

## **DOCUMENTATION**

Each youth's record must contain adequate documentation to support the services rendered and billed. Documentation of the services provided to the youth, the youth's responsiveness, and the interaction and involvement of the staff with the youth should justify and support the services billed. Refer to the Standards Applicable to All Group Care Providers, Records/Documentation Section for more specific requirements.

In order for Group Care Independent Living Services to be billed for any calendar day, services must have been rendered directly to the youth during the day. The designated referring State agency should not be billed for days in which the youth is absent or away for the full day unless the guidelines covering absentee days are met. The State agencies will continue to acknowledge and reimburse absentee days for out-of-home medical care and transition days as previously outlined in the Absentee Day Policy. Unless otherwise specified by the referring State agency, the number of days shall remain as specified; however, the State agency, upon timely notification to the provider, may elect to shorten the time they will reimburse under each type of leave depending on the youth's needs and circumstances. Referring State agencies require notification of planned absences in advance and notification of emergency absences within 24 hours.

## **STANDARDS APPLICABLE TO ALL GROUP CARE PROVIDERS**

### **STAFF REQUIREMENTS**

**General:** Providers shall ensure that all staff, subcontractors, volunteers, interns, and other individuals under the authority of the provider who come into contact with referring state agency children are properly qualified, trained, and supervised. Providers must comply with and meet the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30 and all applicable federal requirements.

**Required Documentation of Qualifications:** Providers will maintain and make available upon request appropriate records and documentation of such qualifications and investigations. If these records are kept in a central "corporate" office, the provider will be given a reasonable amount of time to retrieve the records for the agency that is requesting them.

In addition to documentation of training received by staff and documentation of staff credentials, the provider must keep the following specific documents on file:

- A copy of the individual's resume or a completed employment application form; official college transcripts; and applicable licenses.
- A copy of the individual's criminal record check form from an appropriate law enforcement agency. The criminal record check must be updated every two years.
- Verification from the child abuse registry that there are no findings of abuse or neglect against the individual. The child abuse registry verification must be updated annually.

- Verification from the state and national sex offender registries that there are no findings of sexual charges against the individual. This verification must be updated annually.
- If the employee's position description requires that he/she transport children, a copy of the individual's current driver's license and official motor vehicle record (MVR). MVR checks must be updated every two years.

Providers shall ensure that all staff, subcontractors, volunteers, interns, or other individuals under the authority of the provider who come into contact with referring state agency children are properly qualified.

**Crisis On-Call:** The provider must coordinate and provide back-up for 24-hour, 7-day-a-week on-call crisis services for staff.

**Staff Development and Training:** Training is defined as organized, planned, and evaluated activities that are designed to achieve specific learning objectives. The following general training requirements apply:

- All providers must ensure that staff receives adequate orientation to the program.
- The content of the training must be directly related to the duties of the individual receiving the training.
- Instruction shall be carried out by individuals who are qualified to conduct such training.
- Documentation of training received and successfully completed shall be kept in the individual's training record.
- Documentation of the training shall consist of an outline of the training provided and the trainer's credentials.

All providers must ensure that all staff involved in the direct care of children/youth successfully completes a course in the prevention and management of aggressive behaviors. Annual refresher courses must also be provided.

All staff members will be made aware of the program's written philosophy, rules, policies, procedures, modalities used and the expectations for everyone who is working with the children/youth. Each facility will describe in writing the program's plan for staff orientation, which must include but not be limited to:

- The characteristics of individuals served
- Symptoms and behavioral signs of emotional disturbance
- Symptoms of drug overdose, alcohol intoxication, and possible medical emergency
- The program's emergency and evacuation procedures
- Procedures for reporting suspected incidents of child abuse and neglect
- Orientation in first aid and CPR
- Training in universal precautions and infection control procedures
- The program's policies regarding medication, runaway individuals, and behavior support.

No new staff member will be solely responsible for children in care until he/she has received the minimum orientation described above.

The facility must provide ongoing staff training programs appropriate to the size and nature of the program and staff involved. Each program will have a written plan for staff training, including the

curriculum for behavior support training and refresher training as required by the program model. Providers must comply with and meet the South Carolina Department of Social Services (DSS) licensing requirements.

**Human Services Professional (HSP):** Group Care Intensive Services (GCIS), Group Care Intermediate (GCMS), and Group Care Independent Living Services (GCILS) must be rendered by a Human Services Professional (HSP) or by staff under the supervision of the HSP. In addition to providing or supervising the service delivery, the HSP is responsible for continually assessing and evaluating the condition of the children receiving services.

Each provider of GCIS, GCMS, GCILS shall maintain a file for each HSP substantiating that the individual meets HSP qualifications. This shall include employer verification of the HSP education, licensure, and work experience.

Individuals wishing to be designated in one of the categories requiring a professional license must be licensed to practice in the state in which they are employed and must not exceed their licensed scope of practice under state law.

Individuals wishing to be designated as HSP must be able to document experience working with the population to be served. A “year of experience” is defined as paid and/or volunteer experience that is equivalent to 12 months of full time work experience. Practicum or internship placements as part of a degree program are acceptable as work experience.

The following professionals qualify as an HSP:

A **Psychologist** holds a doctoral degree in psychology from an accredited university or college, is licensed by the appropriate State Board of Examiners in the clinical, school, or counseling areas, and has a minimum of one year of experience working with the population that is to be served.

A **Registered Nurse** is a licensed registered nurse who has a bachelor’s degree from an accredited university or college and a minimum of three years of experience working with the population that is to be served.

A **Mental Health Counselor** holds a doctoral or master’s degree from an accredited university or college in a program that is primarily psychological in nature (e.g., Psychology, Counseling, Guidance, or social science equivalent) and has a minimum of one year of experience working with the population that is to be served.

A **Social Worker** holds a master’s degree from an accredited university or college, is licensed by the State Board of Social Work Examiners, and has a minimum of one year of experience working with the population that is to be served.

A **Mental Health Professional Master’s Equivalent** holds a master’s degree in a closely related field that is applicable to the bio/psycho/social sciences or to treatment of the mentally ill; or is a Ph.D. candidate who has bypassed the master’s degree but has sufficient hours to satisfy a master’s degree requirement; or is a professional who is credentialed as a Licensed Professional Counselor and who has a minimum of one year of experience working with the population that is to be served.

A **Clinical Chaplain** holds a Master of Divinity degree from an accredited theological seminary, has one year of Clinical Pastoral Education that includes provision of supervised clinical services, and has a minimum of one year of experience working with the population that is to be served.

A **Child Service Professional** has a minimum of three years of experience working with the population that is to be served, and fulfills one of the following descriptions:

- Holds a bachelor's degree from an accredited university or college in psychology, social work, early childhood education, child development, or a related field including but not limited to criminal justice, rehabilitative counseling, or elementary or secondary education
- Holds a bachelor's degree in another field and has additional training (a minimum of 45 documented hours of training that could include undergraduate or graduate courses, workshops, seminars, and conferences on issues related to child development and children's mental health issues and treatment) in one or more of the above disciplines

A **Licensed Baccalaureate Social Worker** holds a bachelor's degree from an accredited university or college, has been licensed by the State Board of Social Work Examiners, and has a minimum of three years of experience working with the population that is to be served.

A **Certified Addictions Counselor** holds a bachelor's degree from an accredited university or college, has been credentialed by the Certification Commission of the South Carolina Association of Alcoholism and Drug Abuse Counselors, the NAADAC (The Association for Addictions Professionals), or an International Certification Reciprocity Consortium/Alcohol and Other Drug Abuse approved certification board, and has a minimum of three years of experience working with the population to be served.

## RECORDS/DOCUMENTATION REQUIREMENTS

### GENERAL INFORMATION

**Illegible Records:** A provider record or any part thereof will be considered illegible if at least three medical or other professional staff members who regularly perform record reviews are unable to read the records or determine the extent of services provided. If this situation should occur, a written request for a translation may be made. In the event of a negative response or no response, the reimbursed amount will be subject to recoupment.

**Record Retention:** Providers are required to retain Group Care Intensive, Intermediate, and Independent Living Services records for a minimum period of three years from the date the child is discharged from the program. If any litigation, claim, or other action involving the records have been initiated prior to the expiration of the three-year period, the records shall be retained until completion of the action and resolution of all issues that arise from it or until the end of the three-year period, whichever is later. Providers generally maintain on-site all service delivery and fiscal records pertaining to children placed in residential care. In the event of program closure, providers must notify the State agency representatives.

Records pertaining to residential care that a provider may maintain at an off-site location/storage facility are subject to the same retention policies, and the records must be made available to State agency representatives within five days of request.

**Electronic Records:** In accordance with the South Carolina Electronic Commerce Act of 1998 (S.C. Code Ann. §26-5-10 *et seq.*), electronic records will be accepted assuming that the information is in a reasonably accessible format. The provider must ensure that the electronic record is accessible to reviewers and auditors and the integrity of the record is ensured.

## SERVICE DELIVERY RECORDS

**General Requirements:** Each provider of Group Care Intensive, Intermediate, and Independent Living Services shall maintain a service delivery record for each child. The provider shall ensure that all service delivery records meet the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 code Section 14.

The service delivery record must contain sufficient documentation to allow an individual not familiar with the child to evaluate the course of progress. The absence of appropriate and complete records may result in recoupment of payments by the designated referring State agency. Service delivery records shall be arranged in a logical order such that information can be easily reviewed, audited, and copied.

Each provider shall have the responsibility of maintaining accurate, complete, and timely records and should always adhere to procedures to ensure confidentiality. In addition to the DSS requirements, the service delivery records must include the following:

1. Written Authorization for Placement
2. Signed/titled and dated Care Plan (GCIS and GCMS programs) or Independent Living Plan (GCILS programs). Initial, reviews, and reformulations
3. Signed/titled and dated Summary Notes
4. Court orders, if applicable
5. Signed releases and confidentiality assurances
6. Orientation check list that verifies at the time of admission, the provider oriented the child to rules, consequences, services to be received, rights of the child, and the behavior management system
7. Evidence that transition services are being provided
8. A copy of the Independent Living Assessment (GCILS programs only)
9. A discharge report that:
  - Documents the reason for the discharge
  - Documents service delivery recommendations and outcomes
  - Lists records to be transferred
  - Specifies recommended after-care services
  - Is made available to the referring State agency within ten working days of discharge.
10. Psychosocial and/or psychological evaluation, if applicable
11. Correspondence with agencies involved with the child.

**Abbreviations:** Only approved abbreviations and symbols may be used. Each provider shall maintain a list of any abbreviations and symbols used in the records. This list must be clear as to the meaning of each abbreviation and symbol.

**Index:** Each provider should maintain an index that indicates the correct method for organizing and maintaining service delivery records.

**Signature Sheet:** Each provider must maintain a signature sheet that identifies all staff names, signatures and initials.

**Error Corrections:** Service delivery records are legal documents. When an error is made the following guidelines should be used:

- a) If an entry contains an error, clearly draw one line through the error, write “error” to the side in parentheses, make the correct entry, and add initials and date. Errors must not be totally marked through, as information in error must remain legible.
- b) If an explanation is necessary to clarify the correction, one should be entered. In extreme circumstances, it may be prudent to have a correction and/or explanation witnessed.
- c) No correction fluid, tape, or erasable ink may be used.

**Late Entries:** A late entry may be used to provide additional documentation to supplement entries previously written. Late entries should be used to correct a genuine error of omission or to add new information that was discovered at a later date. When late entries are made, adhere to the following guidelines:

- a) Identify the new entry as a “late entry”
- b) Enter the current date and time
- c) Identify or refer to the date and incident for which the late entry is written
- d) If the late entry is used to document an omission, validate the source of additional information as much as possible
- e) When using late entries, document as soon as possible.

## **INDIVIDUAL CARE PLAN AND INDEPENDENT LIVING PLANS**

**General Requirements:** Providers of Group Care Intensive and Group Care Intermediate Services shall ensure that each child has an individual care plan (ICP). Providers of Group Care Independent Living Skills shall ensure that each youth has an individual living plan (ILP). For children/youth admitted on or after January 1, 2009 an ICP/ILP must be developed within 30 days of admission. For children/youth who were admitted prior to January 1, 2009, an ICP/ILP must be developed at the next scheduled review but no longer than 180 days.

The ICP/ILP is a comprehensive plan of care that is formulated by the Human Services Professional (HSP) based on the individual needs of the child/youth. The ICP/ILP validates the appropriateness of services, and outlines the service delivery needed to meet identified needs, reduce problem behaviors, and improve overall functioning.

The ICP/ILP shall be based upon an assessment of the child/youth’s problems and needs in the areas of emotional, behavioral, life skill development, and educational and vocational. The ICP/ILP must be individualized to the child/youth. The ICP/ILP is considered a working document and should be continuously refined and revised as progress is made and/or new issues arise.

Goals and objectives should be written in language that is clear and understandable. The ICP/ILP should distinguish long- and short-term goals and objectives, and should address discharge planning. The ICP/ILP should be in agreement with the child/youth’s permanency plan, if applicable, and the long-term discharge goal developed by the designated referring State agency.

### **Group Care Intensive and Intermediate Services**

**Individual Care Plan Development:** The Group Care Intensive and Group Care Intermediate Services provider must have written policies and procedures for developing, reviewing, and redeveloping/reformulating individualized care plans. The policy must require all individual care plans to include the following components:

- **Presenting Problem** – Presenting problem statements that outline the specific behavior(s) that validate the need for and appropriateness of the level of care.

- Long-Term/Discharge Goals – Long-term or discharge goals addressing the discharge plan of the child. The long-term goal should match the long-term plan (the child’s permanency plan) of the referring State agency. For every child aged 14 or older, the long-term/discharge goals must include independent living goals specific to that child.
- Short-Term Objectives – Short-term objectives that are stated in behavioral terms and written so that they are observable, measurable, individualized/specific to the child’s problems/needs, and realistic.
- Interventions – Specific methods the provider staff will use to meet the stated objectives. The frequency, or how often each intervention will take place, should be clearly stated.
- Criteria for Achievement – Criteria for achievement that outline how success for each objective will be shown. Criteria must be reasonable, attainable, measurable, include target dates and indicate a desired outcome.
- Target Dates – Individualized to the child and the objective.

For children/youth admitted on or after January 1, 2009 an ICP must be developed within 30 days of admission. For children/youth who were admitted prior to January 1, 2009, an ICP must be developed at the next scheduled review but no longer than 180 days.

**Participation in Individual Care Planning:** The child must be encouraged to participate in the care planning process. Before an individual care plan is finalized, the child must be given the opportunity to have input.

The family must be encouraged to participate in the care planning process if reunification is the goal of the referring State agency’s comprehensive plan. Specific family reunification activities must be described in the ICP. Documentation of compliance with this requirement must be located in the service delivery record.

If the family will not be involved in the care planning process, the referring State agency must provide justification to the provider. Evidence of this justification must be located in the service delivery record. Reasons for excluding the family may include:

- The referring State agency has determined that contact between the child and his/her family is not desirable.
- A court order prohibits contact between the child and his/her family.
- Reunification is not a goal of the referring State agency’s comprehensive plan.
- The child’s family refuses to participate in the process.
- There is another treatment related reason that the family should not be involved in the process.

**Coordination and Notification:** There must be evidence in the service delivery record of coordination between the provider and the referring State agency case manager regarding care planning for the child.

**Initial Individual Care Plan:** An initial ICP must be developed for every child admitted to Group Care Intensive and Group Care Intermediate services and must be placed in the child’s service delivery record. The initial ICP must be developed within 30 days, and shall be written, signed and dated by the HSP. The initial ICP must be signed and dated by the child as evidence of their participation in the care planning process.

The initial ICP must be based on an assessment of the child's needs and should include specific problems or behaviors requiring residential services, goals and objectives, methods and frequency of service delivery, criteria for achievement, and target dates. If the child is 14 or older, the care plan must include independent living goals for transition.

**Individual Care Plan Review:** The purpose of this review is to ensure that services and goals continue to be appropriate to the child's current needs and to assess the child's progress and continued need for residential services. The ICP shall be reviewed and updated according to the child's level of functioning.

ICP reviews must include a written summary and shall be conducted every 90 days. The HSP shall sign/title and date the individual care plan at each individual care plan review.

**Individual Care Plan Reformulation:** For Group Care Intensive Services the individual care plan shall be reformulated every 180 days. For Group Care Intermediate Services the individual care plan shall be reformulated every 365 days. The reformulated ICP must:

- Reflect the child's current problem areas, needs, and discharge goals
- Reflect reformulation of the independent living goals for the level of residential services in which the child/youth is placed
- Support the continued need for residential services to include specific problem behaviors that need to be reduced before the child can be safely stepped down to a less restrictive environment
- Be signed/dated by the HSP
- Never be a photocopy of a previous individual care plan.

**Modifications to the Individual Care Plan:** Any modification made to either the initial ICP or the reformulated ICP prior to the required review date should be signed or initialed and dated by the HSP.

**Required Signatures:** The HSP must sign/title and date (with month, day, and year) the initial care plan as well as any and all subsequent reviews and reformulations. The child must also sign the care plan. If a child does not sign the care plan or if it is not considered appropriate for the child to sign the care plan, the reason the child did not sign must be documented.

### **Group Care Independent Living Services**

**Independent Living Plan:** For Group Care Independent Living Services (GCILS) an Independent Living Plan (ILP) must be developed with the youth within 30 days of the date the GCILS services are initiated. The ILP must be developed, signed/titled and dated by the HSP and the youth. For youth admitted on or after January 1, 2009 an ILP must be developed within 30 days of admission. For children/youth who were admitted prior to January 1, 2009, an ILP must be developed at the next scheduled review but no longer than 180 days.

The ILP shall address the following:

1. Specific problems or behaviors requiring GCILS services. This information must be based on the youth's assessed strengths, problems, and/or needs as outlined in the Independent Living Assessment.
2. Long- and short-term goals that are based on the youth's current level of functioning and desired outcome. Goals shall be realistic, individualized and relate to the youth's problems/needs, especially basic life skills needed to maximize his/her potential for successful independent living. At least one goal must pertain to education or employment.
3. Methods and frequencies of intervention.

4. Transitional/discharge criteria including transition/discharge plans and timeframes for the youths living independently.

**Participation in Independent Living Planning:** The youth must be encouraged to participate in the individual living planning process. Before an individual living plan is finalized, the youth must be given the opportunity to have input.

The family must be encouraged to participate in the care planning process if reunification is the goal of the referring State agency's comprehensive plan. Specific family reunification activities must be described in the ILP. Documentation of compliance with this requirement must be located in the service delivery record.

If the family will not be involved in the individual living plan process, the referring State agency must provide justification to the provider. Evidence of this justification must be located in the service delivery record. Reasons for excluding the family may include:

- The referring State agency has determined that contact between the youth and his/her family is not desirable.
- A court order prohibits contact between the youth and hi/her family.
- Reunification is not a goal of the referring State agency's comprehensive plan.
- The youth's family refuses to participate in the process.
- There is another treatment related reason that the family should not be involved in the process.

**Independent Living Plan Review:** The ILP shall be reviewed a minimum of every 90 days to ensure that services and goals continue to be appropriate to the youth's needs and to assess progress and the continued need for services. The HSP and the youth shall sign the ILP at each review.

**Independent Living Plan Reformulation:** For Group Care Independent Living Services the ILP shall be reformulated every 365 days. The reformulated ILP must:

- Reflect the youth's current problem areas, needs, and discharge goals
- Support the continued need for residential services to include specific problem behaviors that need to be reduced before the youth can be safely stepped down to a less restrictive environment
- Be signed/dated by the HSP
- Never be a photocopy of a previous independent living plan.

**Modifications to the Independent Living Plan:** Any modification made to either the initial ILP or the reformulated ILP prior to the required review date should be signed or initialed and dated by the HSP. There must be documentation that shows the youth was advised of any revisions to the independent living plan.

**Required Signatures:** The HSP must sign/title and date (with month, day, and year) the initial ILP as well as any and all subsequent reviews and reformulations. The youth must also sign the ILP. If a youth does not sign the ILP or if it is not considered appropriate for the youth to sign the independent living plan, the reason the youth did not sign must be documented.

## **PROGRESS SUMMARY NOTES**

**General Requirements:** Group Care Intensive, Intermediate and Independent Living Services shall be documented in a weekly Progress Summary Note that is filed in the child/youth's service delivery record. All providers will document services using the Progress Summary Notes effective January 1, 2009.

A copy of the suggested Progress Summary Note can be found as an Attachment to the State Standards. The purpose of these notes is to record the child/youth's participation in residential services and to summarize the child/youth's progress on long- and short-term goals. Progress Summary Notes should:

- Be individualized and specific to each child/youth
- Document the services provided to the child/youth. Services must relate to the child's care plan or independent living plan
- Document the child/youth's response to staff interaction and involvement with the child/youth
- Document the child/youth's progress to long- and short-term goals
- Summarize progress and note changes with respect to the child/youth's permanency plan and the intended discharge placement if different from the permanency plan
- Document contact between the child/youth and his/her family that relates to care plan goals
- Document that services correspond to billing by type of service, units of service and dates of service (with month, day, and year)
- Be signed/titled and dated by the HSP responsible for service delivery (either through direct service provision or supervision)
- Be legible and kept in chronological order
- Be written, signed, and dated on or shortly after the last day of service that the notes document and must be placed in the record within 14 days.

Progress Summary Notes should not be written or entered in the child's service delivery record prior to the actual date of service delivery.

**Documentation/Signature Requirements:** A Progress Summary Note summarizing the child/youth's program participation, status and functioning must be documented weekly. The Progress Summary Note must address at a minimum the following items:

1. A general observation of the child/youth's condition.
2. The child/youth's activity and participation in the program. This must include the child/youth's progress on goals as well as involvement in the structured program and/or other activities.
3. The involvement of the staff in service provision is required and shall be documented.
4. Future plans for working with the child/youth.

All Progress Summary Note entries must:

- Be typed or handwritten using only black or blue ink
- Be legible and kept in chronological order
- Be dated with month, day, and year
- Be legibly signed or initialed by the appropriate HSP. The HSP signature verifies that the services were provided in accordance with the appropriate standards. If someone other than the HSP completes the Progress Summary Note, this individual must also sign/title and date the note
- Identify individuals referenced by full name, title, and agency or provider affiliation at least once.

A copy of a suggested Progress Summary Note is located at the end of these Standards. Providers are not required to use this form, but **must** ensure that the Progress Summary Note used for documentation purposes address at a minimum all of these content areas.

## **RIGHTS OF CHILDREN IN RESIDENTIAL CARE**

**Policy Requirements:** The provider must have a written policy that outlines the Rights of Children in Residential Care. The policy must include the following:

1. Children shall have a right to dignity, privacy, and humane care.
2. Nothing shall restrict or infringe on a person's right to religious preference and practice. The provider shall make all reasonable efforts to ensure that every child is afforded the opportunity to participate freely in religious activities and/or services in accordance with his/her own faith, however, the provider shall not coerce or require children to participate in religious activities, and the provider shall offer comparable alternative secular programming for those children who do not chose to participate in religious activities.
3. Children shall receive services, within available sources, which protect the personal liberty of the individual and which are provided in the least restrictive conditions necessary.
4. Children shall have a right to participate in an appropriate program of quality education and training services, within available resources, regardless of chronological age or degree of disability.
5. Children shall have a right to social interaction and to participate in community activities.
6. Except to the extent that it is required by the medical needs, safety, or goals of the child to impose restrictions, children shall be allowed to communicate by sealed mail, telephone, or otherwise persons, including official agencies inside or outside the institution. Reasonable access to writing materials, stamps, envelopes, and telephone must be provided.
7. Children shall have right to visitation subject to reasonable rules of the facility. Family visitation will not be withheld as a consequence for the child's problematic behavior. However, nothing in this provision shall be construed to permit infringement upon other children's privacy.
8. Children have the right to the possession and use of their own clothing, and personal effects, except in specific instance where the use of some of these items as reinforcers is essential for training the child as part of an appropriately approved behavioral program.
9. Children have the right to daily physical exercise.

## **MEDICATIONS**

**General Information:** All residential services programs must ensure that prescribed medication is stored in a secure, double-locked location. "Double-locked location" means that one locked container is stored inside a second locked location, both of which can be opened using a key, combination, or electric lock.

Program staff shall be informed of medication side effects/interactions and trained in proper administration and documentation of side effects. Providers must comply with and meet the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30

The provider must make every effort to notify all medical personnel who will prescribe and/or administer medications to a child/youth about any medications the child/youth is currently taking, and of any changes in the child/youths medication and functioning since he/she was last seen by the medical caregiver.

**Program Policy Requirements:** The program must have a policy that specifies the method of administering medication, the documentation requirements including medication logs, frequency of medication reviews, and process for obtaining informed consent, if applicable. The policy must include written procedures for documenting and communicating medication error(s).

**Medication Logs:** At a minimum, medication logs must show the dates and times the medications were administered and include the initials of the staff member who administered them each time the medication is administered. The log must also document all changes in medications.

## **EMERGENCY SAFETY INTERVENTION**

**General Information:** All providers of Group Care Intensive, Intermediate, and Independent Living Services are responsible for adhering to all requirements in this section. This includes providers that have policies prohibiting the use of such interventions but who may have an emergency situation requiring staff interventions.

“Restraint” is defined as any type of physical interventions including mechanical restraints and therapeutic holds that reduces or restricts an individual’s freedom of movement and is administered without the individual’s permission.

Restraint and seclusion shall be used only to ensure the immediate safety of the individual or others when no less restrictive intervention has been or is likely to be effective in averting danger. Restraint and seclusion shall never be used for coercion, retaliation, humiliation, as a threat or form of punishment, in lieu of adequate staffing, as a replacement for active treatment, for staff convenience, or for property damage not involving imminent danger.

Providers must comply with and meet the South Carolina Department of Social Services (DSS) licensing requirements Chapter 114 Statutory Authority: 1981 Code Sections 63-11-30, 114.490.

**Staff Training Requirements:** All providers must ensure that all staff involved in the direct care of the child/youth successfully completes a course from a certified trainer in the use of restraints and seclusion. Training should be aimed at minimizing the use of such measures, as well as ensuring client safety. For more information on selecting training models, see Section 7 of the Project REST *Manual of Recommended Practice*, available at [www.frcdsn.org/rest.html](http://www.frcdsn.org/rest.html).

Staff must successfully complete all required training in Emergency Safety Interventions prior to ordering or participating in any form or restraint. All staff involved in the use of seclusion and restraint must use the necessary and appropriate skills, knowledge, and expertise to judiciously apply interventions in a safe manner. Providers must adhere to all state licensing laws and regulations regarding the use of seclusion and restraint.

**Program Policy Requirements:** Each program will develop and implement a comprehensive written policy that governs the circumstances in which these practices are used. The policy shall identify the following:

- The threshold for initiating restraint and seclusion, such that the use of restraint or seclusion will be permitted only after other less-restrictive methods to prevent immediate and substantial bodily injury to the individual or others have been attempted and have failed
- Forms of restraint identified for use
- Specific criteria for the use of restraint and seclusion
- Staff members authorized to approve the use of restraint and seclusion
- Staff members authorized and qualified to administer or apply restraint and seclusion
- Approved procedures for application of each form of restraint and seclusion
- Procedures for monitoring any individuals placed in restraint and seclusion
- Limitations on the use of restraint and seclusion, including any applicable time limitations
- Procedures for immediate and continuous review of restraint and seclusion incidents to include reducing the likelihood of reoccurrence
- Procedures for comprehensive recordkeeping concerning all incidents of restraint and seclusion
- Procedure for reporting critical incidents resulting from the use of seclusion and restraint

**Notification of Rights, Policies, and Procedures at Admission:** Each program must have written policies regarding notification of rights, policies, and procedures at admission. At admission, the facility will inform the incoming individual and, in the case of a minor, the parents or legal guardians of the policy regarding the use of restraint and seclusion during emergency safety situations that may occur while the individual is in the program. The explanation will include the program's behavioral expectations and requirements. It will also include:

- Who can implement seclusion or restraint
- The actions staff members must first take to defuse the situation to avoid using seclusion or restraint
- The situations in which seclusion or restraint may be used
- A description of the emergency safety intervention procedures used
- When the use of emergency safety intervention will end
- What action the individual must exhibit to be released from emergency safety intervention
- The grievance procedure to report an inappropriate restraint or seclusion
- The opportunity to view time-out and quiet and seclusion rooms or areas.

Communication shall take place in a language that the individual and his/her parents or legal guardians understand. When necessary the program must provide interpreters or translators.

The program will obtain an acknowledgment in writing from the individual and his/her parents or legal guardians that they have been informed of the program's policy regarding the use of restraint or seclusion. The program will also obtain written consent from the individual's parents or guardians (unless otherwise ordered by the court) regarding permission to use restraint and seclusion in the event of an emergency crisis situation. The acknowledgment and consent forms must be filed in the individual's record and the program will provide copies to both the individual and his/her parents or legal guardian and the referring state agency.

**Documentation:** Each program must document all emergency safety interventions. Documentation shall include the following:

- A description of what happened
- The date and beginning and ending times of the incident
- Any precipitating incidents
- The age, height, weight, and gender of the child/youth
- The exact methods of intervention used, the reasons for their use, and the duration of the intervention
- The names of all children/youth involved
- The names and titles of staff or others involved, and their relationship to the child/youth
- Names of witnesses to the precipitating incident and subsequent restraint/seclusion
- The names and title of staff or others involved, and their relationship to the child/youth
- A detailed description of any injury to the child/youth including a body chart or photo
- The action taken by the provide as a result of the injury
- Preventive actions to be taken in the future
- A description of debriefing activities
- The follow-up required
- Documentation of supervisory and administrative reviews
- Description of notification efforts, including who was contacted, how and when they were contacted and verification that contact was made.

The documentation must be completed by the end of the shift in which the intervention occurs ad will be kept in the child's service delivery record.

**Monitoring/Termination:** All providers must have a written log of each seclusion and or restraint episode. Programs must ensure that, when restraints or seclusion have been employed, the staff conducts regular internal oversight reviews.

A staff member should provide visual monitoring of the individual in seclusion or restraint and make a written annotation in the log at least once every fifteen minutes. The entry will describe the individual's behavior at that time and whether he /she needs continued seclusion or restraint. The program will have written procedures that outline the criteria for terminating a seclusion or restraint.

## **CRITICAL INCIDENTS**

**General Requirements:** All residential services providers must have a policy on critical incidents. At a minimum, the following behaviors and situations will be considered critical incidents:

- Death of a child/youth
- Attempted suicide
- An incident that requires off-site emergency medical treatment
- An incident that requires an off-site emergency assessment
- Absence without approval
- Possession of a weapon
- Possession of an illegal substance
- A report to or involvement of an outside regulatory agency, e.g., law enforcement, DSS OHAN, the Office of Children's Affairs, etc.

- An emergency change of placement, e.g., discharge, hospitalization, incarceration, internal transfer, etc.
- Removal from school including suspension, expulsion, and placement on Medical Homebound or Home-based
- Use of restraint or seclusion

**Notifications:** The program policy must specify that the above-stated incidents require the provider to notify the referring State agency. **In the event of attempted suicide by or the death of a child, the provider must notify OHAN, the referring State agency case manager or case manager's supervisor within 24 hours.** All other state and federal reporting requirements apply.

Solicitation 06-S7191 Amendment 2 which was issued by the South Carolina Materials Management Office on May 16, 2006 stated that the participating agencies would provide additional information regarding the reporting of critical incidents. The amendment stated:

- Copies of critical incident reports will be submitted to the referring caseworker and other required entities as soon as practical, but no later than the end of the first business day following the incident.
- The state agencies will work together to outline a list of situations which require 24 hour notification by telephone regardless of Saturdays and Sundays.
- The state agencies will work together to ensure that providers have 24 hour numbers available to accomplish this reporting requirement.

The following critical incidents must be reported by telephone within 24 hours regardless of Saturdays, Sundays, or holidays.

- Death of a client
- Attempted Suicide by a client
- Absence without approval
- A report to or involvement of an outside regulatory agency (this includes law enforcement)
- An emergency change in placement
- Any serious illness or injury

In addition to the above, the Program Director may make a judgment call regarding additional incidents that are of a serious nature and should be reported to the referral agency within 24 hours by telephone regardless of Saturdays, Sundays, and holidays.

Agency contacts are available to the Contractors listing 24 hour on call numbers for their respective agency.

All ERMIS reporting requirements apply for juveniles under the supervision of the Department of Juvenile Justice.

**Critical Incident Report:** A Critical Incident Report that can be used by providers is found as **an Attachment of this document.** Providers are not required to use this form, but **must** ensure that the Critical Incident Report form used address at a minimum all of the following required elements:

- A clear description of the events leading up to the behavioral situation
- Staff intervention into the behavioral situation

- Outcome and necessary follow-up to the behavioral situation
- Date and time of referral agency notification, who was notified and who on the provider's staff made the notification
- Date and time provider staff were notified, name and title of provider staff who was notified, and who on provider staff made the notification as identified by the provider's policy requirements
- Dated signatures of the person completing the incident report and the person(s) completing the clinical and administrative review as identified by the provider's policy requirements.

The Critical Incident Report form must be kept in the child's service delivery record or some other location at which they are readily available for review by staff of the referring agency, monitoring entities, law enforcement personnel, medical personnel, and other authorized personnel.

## TEMPORARY CLOSINGS

**Temporary Program Closings:** Providers of Group Care Intensive, Intermediate, and Independent Living services must notify the referring State agency representatives concerning all programs that are temporarily closed due to emergency situations. If a program closes for more than ninety days, providers will need to resubmit all required information to the Materials Management Office.

## UNIT OF SERVICE

**Definition and General Requirements:** A unit of service is defined as any day or portion of a day that the child/youth receives group care services from a provider. The referring State agency may be billed for a unit (day) of service only if one of the following applies:

1. The child/youth received services during that day and has spent the night before or the night of the day in question.
2. Services are billable from the date of admission; however, the date of discharge may not be billed.
3. The guidelines covering reimbursement for absentee days are met (Refer to the Absentee Day Policy Section below for more specific requirements).

Providers must maintain adequate documentation to support the number of units billed.

## ABSENTEE DAY POLICY

**General Information:** The purpose of this policy is to provide clarification about reimbursement when children are absent from Group Care Intensive, Intermediate, and Independent Living Services programs. Absentee days should be documented in the body of the Progress Summary Note. The documentation shall illustrate the nature of the absence, providing the record reviewer with a clear understanding of the type of absentee day that has been reimbursed. Also required are the dates the child left and returned to the program, and a summary of the service benefit.

Absentee days for both Out-of-Placement Medical Care Leave and Transition & Family Reunification Leave are per provider, per child, per year in placement. If a child is discharged from one provider's program and admitted into a different provider's program, the days allocated under the Absentee Day Policy start over with the new provider's program. Per year in placement varies from child to child and is counted from each child's date of admission into a program. Absentee days are only reimbursable if the child returns to the same program.

**Out-of-Placement Medical Care:** The following criteria will apply when a child is temporarily absent from a program due to medical reasons requiring crisis stabilization, acute hospital care, inpatient psychiatric care, and/or residential substance abuse treatment:

1. State Agencies will reimburse for a maximum of 20 days of medical leave per year in treatment
2. The child must return to the same program. If it is known that the child will not return to the program following the medical leave, the day the child leaves on medical leave will be the date of discharge. If the program expects the child to return, but during the course of medical treatment a decision is made for the child to be placed elsewhere, the day the child left on medical leave is a billable day. The day the program is notified that the child will not return is the date of discharge. The days in between are not reimbursable since the child did not return to the program.

**Required Documentation:** The provider must document the following in behavior specific terminology in the Progress Summary Note:

- The incident leading up to medical leave
- The date the child left the program
- Where the child was placed
- That the referring State agency was notified. The referring State agency should execute any additional forms when required.
- Communication between the provider and the entity providing medical services
- The date the child returned to the program

**Transition and Family Reunification:** The following criteria will apply when a child is transitioning out of the program or for the purpose of family reunification:

1. State Agencies will reimburse for a maximum of five consecutive absentee days per period of leave, not to exceed 18 days per year in treatment.
2. Periods of leave may not be used for program/facility closings.
3. Periods of leave may be used when a child attends camp or participates in an out-of-state trip if the focus of this transitional leave is therapeutic in nature and consistent with service plan goals. Absentee days are not reimbursable for attending sports camps, educational camps, boy/girl scout camps, etc.

If it is known that the child will not return to the program following the transition/family reunification leave, the day the child leaves the program will be the date of discharge. If the program expects the child to return, but during the course of leave a decision is made for the child not to return to the program, the day the child left on leave is a billable day. The day the program is notified that the child will not return is the date of discharge. The days in between are not reimbursable since the child did not return to the program. If a child returns for a portion of a day to collect personal belongings and/or meet with staff, **but does not stay overnight**, this is **not** a billable day.

**Required Documentation:** The need for transitional and family reunification leave must be reflected in the child's Individual Service Plan in behavior-specific terminology. The provider must also document the following in the Progress Summary Note:

- How the child was prepared for the leave
- What transpired during the leave
- How the child benefited from the leave

- The goals the child was working toward
- The child's behavior during the leave
- The child's behavior upon return to the program

**Unauthorized Leave:** Unless otherwise approved by the referring State agency, State agencies will not reimburse for days when a child is absent from a program due to "running away" or temporary incarceration. The absence should be annotated in the appropriate blocks on the Progress Summary Note with an "A."

**Administrative Policy:** The Group Care Maximum, Intermediate and Independent Living Services provider must annotate the days the child was absent and present in the appropriate blocks provided on the Progress Summary Note, adhering to the following instructions:

1. If a child is present for any portion of a day on which a service is rendered and has spent the night before or the night of the day in question, annotate the box with a "P."
2. If a child is absent but meets the Absentee Day policy criteria, annotate the box with an "M".
3. If a child is absent from the program due to an unauthorized leave, annotate the box with an "A." These are **not** reimbursable days.
4. If a child is absent from the program due to any of the following, annotate the box with an "A." These are **not** reimbursable days:
  - a) Reasons other than those in the Absentee Day policy
  - b) Program closings
  - c) If the days absent exceed the allocated days in the Absentee Day Policy
5. If the child is discharged from the program — planned or unplanned — annotate the block with a "D". This is **not** a reimbursable day.

**Attachments to State Standards**

**Request for Dual Placement in a Therapeutic Foster Home**

**Child A (request to be placed):**

Date dual placement to begin \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Gender /age

\_\_\_\_\_  
Caseworker's name, office/agency, phone #

Reason/Justification for Dual Placement: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Describe the behaviors that caused Child A to be in therapeutic care (history), and current behaviors:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----  
**Child B (currently placed):**

Date of Placement in this home \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Gender /age

\_\_\_\_\_  
Caseworker's name, office/agency, phone #

Describe the behaviors that caused Child B to be in therapeutic care (history), and current behaviors  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of foster parent(s): \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

List all other children in the foster home:

Name

Gender /age

Indicate biological/adopted, foster child, relative, etc.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Licensed thru (TFC Agency): \_\_\_\_\_

LCS: \_\_\_\_\_

Describe all physical, emotional or behavioral issues (including sexual behaviors) of either youth that could place them or other children at risk, and the steps to be taken to minimize the risk. Also describe how the foster parent will manage all of these children successfully, including any support from the TFC Agency (add page if needed).  
\_\_\_\_\_  
\_\_\_\_\_

**A. I/we request approval for dual placement**

\_\_\_\_\_  
Name of Caseworker for Child A

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_/\_\_\_\_\_  
Name of Supervisor for Child A                      Signature                      Date

**B. I/we recommend (accept) dual placement**

\_\_\_\_\_/\_\_\_\_\_  
Name of Caseworker for Child B                      Signature                      Date

\_\_\_\_\_/\_\_\_\_\_  
Name of Supervisor for Child B                      Signature                      Date

-----  
**Approval: I agree to the dual placement described above.**

\_\_\_\_\_/\_\_\_\_\_  
Name of Approval Authority/Designee for Child B   Signature                      Date

## RESIDENTIAL GROUP CARE WEEKLY PROGRESS SUMMARY NOTE

1. Client Name (Last, First, MI)						Date of Birth:	
2.							
	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
Date (Mo/Day/Yr)							
Present/Absent							
3. Client participated in the following program components this week:							
___ Assessment/Care Planning	___ Educational/Vocational		___ Crisis Intervention		___ Transitional Services		
___ Behavior Management	___ Life Skills /Independence		___ Recreation		___ General Care (Social, Physical, Emotional)		
4. Summary should include an integrated review of the services provided by the program. Documentation should include the following: a) General observations of the client; b) Services provided to the child; c) the child's response to services; d) interaction and involvement of staff; and e) future plans for working with the child. The child's progress toward long and short-term goals should also be documented.							
5. Staff Signature and Title				Date:		6. HSP Signature and Title	

## CRITICAL INCIDENT REPORT

1. Name of program/level of care:

\_\_\_\_\_

2. Location of incident:

\_\_\_\_\_

3. Name of client:

\_\_\_\_\_

4. Date of incident: \_\_\_\_\_ (month, day and year) Time: \_\_\_\_\_ AM/PM (circle one)

5. Name of staff(s) involved in the incident:

\_\_\_\_\_

6. Type of critical incident (check all that apply)

Attempted suicide by a client

Death of a client

Off-site emergency medical treatment (location: \_\_\_\_\_)

Off-site emergency assessment (location: \_\_\_\_\_)

Absence without leave/runaway (date and time of return: \_\_\_\_\_)

Possession of a weapon (type: \_\_\_\_\_)

Possession of an illegal substance (type: \_\_\_\_\_)

Report or involvement of an outside regulatory agency (agency involved:

\_\_\_\_\_)

Placement in Seclusion or Restraints

Emergency change of placement:

☐ Discharge   ☐ Hospitalization   ☐ Incarceration   ☐ Internal Transfer

☐ Other: \_\_\_\_\_

Removal from school:

☐ Suspension (# of days: \_\_\_\_\_)   ☐ Expulsion   ☐ Medical Homebound

☐ Homebased   ☐ Other: \_\_\_\_\_

Other: \_\_\_\_\_

7. Describe the incident and the circumstances surrounding it (attach additional pages if necessary):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. What precipitating factors may have contributed to the incident? (attach additional pages if necessary)

9. Describe the behavior management/intervention technique used to de-escalate the client and the client's response (attach additional pages if necessary):

10. Describe follow-up actions taken (attach additional pages if necessary):

11. NOTIFICATIONS	Name and Title of Person Notified/Agency Affiliation:	Date:	Time:	Name of Person Notifying:
Internal Staff				
Referring Agency				
Parent/Guardian				
Regulatory Agency				
Law Enforcement				
Other				

12. Signatures:

Signature and Title of Person Who Completed This Report

Date

Signature and Title of Clinical Reviewer

Date

---

Signature and Title of Administrative Reviewer

---

Date

---

Signature and Title of LIP (for seclusion and restraint only)

---

Date

Each report should be reviewed for completeness and quality by considering the following:

1. The information contained in the report is comprehensive and relevant.
2. The appropriate authorities/agencies, program/supervisory staff and parents/guardians were notified of the incident.
3. The actions taken in response to the incident were timely and appropriate.
4. The report is appropriately signed and dated.

**WILDERNESS CAMP MAINTENANCE AND REPLACEMENT  
GUIDE FOR THE  
SOUTH CAROLINA DEPARTMENT OF JUVENILE JUSTICE (SCDJJ)**

1. Regular service will be provided by the contracted operator of each facility to include: Heating and Air Conditioning (HVAC) units, filters, registers, hot water systems and tanks, facility painting (interior and exterior), portable water systems, missing roofing tiles, fixtures and well equipment (when applicable), lighting and switches, appliances for kitchen, flooring clean and upkeep as well as deck railings and deck boards. These items are all inclusive for required preventative maintenance needs by the Operator.

2. Replacement of major systems which fail due to age or functional obsolescence may be paid for by SCDJJ as the Facility Owner. It will be the responsibility of the Operator to obtain the proper documentation that any said unit or item is beyond repair and submit to the Wilderness Camp Administrator of Facilities for SCDJJ. Any purchase of items will be subject to the SC Procurement guidelines and managed by SCDJJ only. Any purchases or items not approved by SCDJJ will NOT be paid for. Determination of replacement will be solely by SCDJJ Wilderness Camp Facility Manager and the Procurement Manager for SCDJJ.

**Examples Include:**

- A. By Operator: Wind storm blows a few roof tiles off.
- B. By SCDJJ: Hot water tank is beyond repair and needs to be replaced.
- C. By SCDJJ: Hail storm greatly damages the roof.
- D. By Operator: Deck rail is broken by a juvenile.
- E. By SCDJJ: HVAC unit is documented and beyond repair.
- F. By Operator: Exterior and windows are worn because of failure to paint and maintain. (All Repairs and Paint)
- G. By Operator: Shower and sink are dripping and broken.
- H. By Operator: Filter repairs and replacement of all types.

**EDUCATION STANDARDS CHECKLIST**

There are written policies, procedures and practices for operation of the entire program on file with approval by the South Carolina Department of Juvenile Justice's Special School District in accordance with the Department of Juvenile Justice Defined Minimum Program – DMP.

Educational staff are fully certified by the Department of Education. Certification is in areas approved under the Department of Education guidelines and in areas that are required to be taught English, Math, Science, Social Studies and Special Education.

Technical supervision by licensed or certified educational staff is approved by the Department of Juvenile Justice's Special School District Superintendent or his/her designee.

Procedure for providing adequate academic instruction through the use of substitute teachers in the absence of professional staff is approved by the Department of Juvenile Justice's Special School District Superintendent or his/her designee.

Classroom teachers will be assigned according to a maximum average ratio of fifteen juveniles per certified teacher. Special education teachers must follow the ratio guidelines in the South Carolina Department of Juvenile Justice Special Education Procedures Manual.

Appropriate physical facilities are available for classroom instruction, as defined by the South Carolina Department of Education.

Appropriate texts, AV, computers and other learning materials are available. A written curriculum guide, which is aligned with South Carolina State Standards for all subject areas is available for review.

The classroom is appointed with appropriate equipment and furnishings to provide for the educational needs of the average juvenile caseload.

Juveniles are provided with appropriate reading and writing materials and workspace or independent academic or leisure pursuits, such as a small lending library of age appropriate materials.

Text selection is based on programs and materials currently approved by the Department of Education Textbook Adoption Program.

A lending library must be available for supplementary and leisure reading. Instruction in the subject areas shall be scheduled for each juvenile for a minimum of 1800 minutes or 30 hours per week, including lunch for grades six through eight, and excluding lunch for grades nine through twelve. Units of credit in grades nine through twelve will be granted when a juvenile attends at least 120 hours of direct instruction from a certified teacher. All credits and transcripts will be granted/issued by the designated DJJ school. Innovative approaches to instruction may be implemented after approval by the Department of Juvenile Justice Special School District Superintendent or his/her designee.

## **Educational Standards Checklist**

### **Page Two**

Written policies, procedures, and practices provide that each juvenile is evaluated in terms of basic academic and personal needs based on information received through contact with the juvenile's home, school and district.

Provisions to meet the educational needs of juveniles requiring special education services because of physical, mental, emotional, or learning disabilities are appropriately outlined and implemented in accordance with the South Carolina Department of Juvenile Justice Special Education Procedures Manual and South Carolina Department of Education guidelines. A Certified Special Education teacher must be employed full time to provide these services.

The educational program allows for flexible scheduling that permits juveniles to enter any time and to proceed at their own learning pace.

Career and technology education will be appropriate to the needs of the juveniles and in accordance with the South Carolina Department of Education guidelines.

Allowance for juvenile access to counseling and other support services is accommodated without loss of instructional time.

Annual and ongoing evaluation and review of the educational program by the South Carolina Department of Juvenile Justice Special School District Superintendent or his/her designee is implemented. This evaluation includes evaluation of the education staff.

Participation in the statewide testing program is required.

Provisions are made for coordinating the sharing of information on attendance, achievement, and/or grades with a designated school facility at the Department of Juvenile Justice to assure the juveniles meet school attendance requirements and continue to earn Carnegie units where applicable. When juveniles meet requirements, a high school diploma will be awarded.

Maintenance of appropriate educational records and their privacy and security is provided.

Participation by professional staff in DJJ Educational Services' staff development programs is required and documented.

## **MEDICAL AND PHARMACY BILLING PROCESS**

### **DJJ Community Residential Alternatives**

The guidelines for payment of invoices for children receiving medical and pharmacy services in DJJ placements are outlined below. Group home staff secures the needed services and processes invoices for payment. Invoices should be processed expeditiously. Medicaid, state agencies, and private insurance companies have limitations regarding time limits for payment. If invoices are not processed within prescribed time frames required by Insurance Companies and/or Medicaid, then DJJ will not be responsible for payment, unless the Provider can justify that the delay was beyond their control. In all instances, contractor will email or fax medical services invoices to DJJ within five business days after receipt.

#### **Juveniles who are Medicaid Eligible** **(Probation and Parole Legal Status)**

1. Residential Care Staff will obtain the required health care services for the juvenile from the appropriate provider.
2. If the juvenile is covered by private insurance, the Residential Care Facility Staff will provide this information to the medical provider at the time services are rendered. The medical provider will bill the private insurance company for services rendered and Medicaid for any co-pays or deductibles.
3. If the juvenile does not have private insurance, the Residential Care Facility Staff will provide the provider with the juvenile's Medicaid Card/Number at the time services are rendered.
4. The medical provider will bill Medicaid directly for services rendered.

#### **Juveniles who are Not Medicaid Eligible due to age or citizenship**

1. Residential Care Staff will obtain the required health care services for the juvenile from the appropriate provider.
2. If the juvenile is covered by private insurance, the Group Care Facility Staff will provide this information to the medical provider at the time services are rendered. The medical provider will bill the private insurance company for services rendered and the parent/guardian for any co-pay or deductibles. If the residential care provider determines that the parent/guardian is unable or unwilling to pay the co-pay/deductible and requests assistance, the co-pays/deductibles may be processed in accordance with these procedures for payment by DJJ. These invoices will be submitted to the Community Alternatives Program Monitor by email or fax no later than five business days after receipt.
3. For Juveniles who do not have a valid birth certificate (and therefore are not Medicaid eligible), the contractor will instruct the provider to bill at the Medicaid rate. The contractor will then submit these invoices to DJJ for payment as outlined in this document.

**Non-Medicaid Juveniles due to Transfer Status**

1. Residential Care Staff will obtain the required health care services for the juvenile from the appropriate provider.
2. If the juvenile is covered by private insurance, the Residential Care Staff will provide this information to the provider at the time services are rendered and the provider will bill the private insurance for services and the parent/guardian for any co-pay or deductibles. If the residential care provider determines that the parent/guardian is unable or unwilling to pay the co-pay/deductibles and requests assistance, the co-pay/deductibles may be processed in accordance with these procedures for payment by DJJ.
3. If the juvenile is uninsured, the provider may bill, at the Medicaid rate, for services rendered. The medical services provider will send the bill to the Community-Based Residential Provider. The residential provider will complete the Health Services Referral and Certification Process/Form.
4. No later than five days after receipt, Marine and Wilderness Camps will provide a copy of the Health Services Referral and Certification Form, along with the bill from the medical provider, to SCDJJ at the following address:

Medical Director  
Willow Lane Infirmary  
4650 Broad River Road  
Columbia, SC 29210

Other residential providers will submit this same information to their Community Alternatives Program Monitor. The Program Monitor will check legal status, approve, and submit to the Health Services Medical Director for payment.

5. Camp Bennettsville, Camp Sand Hills, Camp White Pines and Camp Aspen will pay pharmacy bills directly for juveniles on **transfer status** and submit requests for reimbursement to the Medical Director (see Item 4 above for address). Within 30 days from the date of payment by the contractor, the Health Services Referral and Certification Form will be submitted along with the invoice, proof of payment, and a request for reimbursement.

**CAROLINA DEPARTMENT OF JUVENILE JUSTICE**

**Health Services Referral and Certification Form**

Date: \_\_\_\_\_

Juvenile's Name: \_\_\_\_\_

JJMS#: \_\_\_\_\_

Facility: \_\_\_\_\_

Reason for Referral: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

=====

Referred to: \_\_\_\_\_

Date of Service: \_\_\_\_\_

Charge: \_\_\_\_\_

Contact with custodial parent concerning insurance or other coverage for payment:

\_\_\_\_\_

\_\_\_\_\_

Legal Status:      Probation \_\_\_\_\_      Parole \_\_\_\_\_      Transfer \_\_\_\_\_

\_\_\_\_\_  
Residential Director Authorization

\_\_\_\_\_  
Date

## **SAMPLE CONTRACTS**

**(Name of Alcohol and Other Substance Abuse Treatment Provider)**  
**Alcohol and Other Substance Abuse Treatment Agreement**

The \_\_\_\_\_ Wilderness Camp \_\_\_\_\_ will contract with the \_\_\_\_\_ (Alcohol and Other Substance Abuse Provider) \_\_\_\_\_ with specified alcohol and other substance abuse treatment services to the children of the \_\_\_\_\_ (Wilderness Camp) \_\_\_\_\_ being provided by \_\_\_\_\_ (Alcohol and Other Substance Abuse Provider) \_\_\_\_\_. The purpose of this agreement is to set forth the understanding between \_\_\_\_\_ (Alcohol and Other Substance Abuse Provider) \_\_\_\_\_ and the \_\_\_\_\_ (Wilderness Camp) \_\_\_\_\_.

**Alcohol and Other Substance Abuse Treatment Provider agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the Wilderness Camp of any changes within thirty (30) days.

**Alcohol and Other Substance Abuse Treatment Provider agrees** to comply with all credentialing processes and to maintain all licenses required by South Carolina law.

**Alcohol and Other Substance Abuse Treatment Provider agrees** to maintain medical records required by South Carolina law, to provide necessary records to the Wilderness Camp and to preserve confidentiality.

**Alcohol and Other Substance Abuse Treatment Provider agrees** to provide treatment services that require therapeutic interventions beyond the clinical scope of the out-of-home placement provider's treatment capacity, which is limited to juveniles who are substance abuse dependent.

**The South Carolina Department of Juvenile Justice agrees** to compensate the (Alcohol and Other Substance Abuse Treatment) at Medicaid rates for all Alcohol and Other Substance Abuse Treatment services provided to \_\_\_\_\_ (Wilderness Camp) \_\_\_\_\_ juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either party elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one-year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify \_\_\_\_\_ (Wilderness Camp) \_\_\_\_\_ of its intention in writing (90) days prior to the anniversary date.

**(Name of Alcohol and Other Substance Abuse Treatment Provider)  
Alcohol and Other Substance Abuse Treatment Agreement**

(Alcohol and Other Sub. Abuse Provider)      (Wilderness Camp)

\_\_\_\_\_  
**Alcohol and Other Sub. Abuse  
Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Signature**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**Date** \_\_\_\_\_

**South Carolina Department of Juvenile Justice**

\_\_\_\_\_  
**Deputy Director for Administrative Services  
SC Department of Juvenile Justice**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**(Dentist Name or Group)  
Agreement**

The (Wilderness Camp) will contract with (Dentist or Group) to provide healthcare services to the children of the (Wilderness Camp). The purpose of this agreement is to set forth the understanding between (Dentist or Group) and the (Wilderness Camp).

**(Dentist or Group) agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the Wilderness Camp of any changes within thirty (30) days.

**(Dentist or Group) agrees** to conduct juvenile emergency and/or non-elective examinations and provide treatment and services as required.

**(Dentist or Group) agrees** to refer cases to oral surgeons, endodontists, etc. When the need arises.

**The South Carolina Department of Juvenile Justice agrees** to compensate (Dentist or Group) at the Medicaid rates for all treatment and services provided to (Wilderness Camp) juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either part elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one- year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify (Wilderness Camp) of its intention in writing (90) days prior to the anniversary date.

**(Dentist or Group)**

**(Wilderness Camp)**

\_\_\_\_\_  
**Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Sign.**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**(Dentist Name or Group)  
Agreement**

**South Carolina Department of Juvenile Justice**

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**Deputy Director, Administrative Services  
SC Department of Juvenile Justice**

---

**Witness**

**Date** \_\_\_\_\_

**(Name of Hospital)**  
**Hospital Services Agreement**

The Wilderness Camp will contract with the  
(Hospital) with all healthcare services to the children of the  
(Wilderness Camp) being provided by (Hospital). The  
purpose of this agreement is to set forth the understanding between  
(Hospital) and the (Wilderness Camp).

**Hospital agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the Wilderness Camp of any changes within thirty (30) days.

**Hospital agrees** to comply with Joint Commission for Accreditation of Healthcare Organizations credentialing process and to maintain all licenses required by South Carolina law.

**Hospital agrees** to maintain medical records required by South Carolina law, to provide necessary records to the Wilderness Camp and to reserve confidentiality.

**The Wilderness Camp agrees** to follow guidelines for security as outlined by the Safety and Security Department of (Hospital).

**The South Carolina Department of Juvenile Justice agrees** to compensate the Hospital at Medicaid rates for all hospital services provided to (Wilderness Camp) juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either part elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one-year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify (Wilderness Camp) of its intention in writing (90) days prior to the anniversary date.

**(Hospitals Name)**

**(Wilderness Camp)**

\_\_\_\_\_  
**Hospital Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Signature**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**Date** \_\_\_\_\_

**(Name of Hospital)**  
**Hospital Services Agreement**

**South Carolina Department of Juvenile Justice**

\_\_\_\_\_  
**Deputy Director, Administrative Services**  
**SC Department of Juvenile Justice**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**(Name of Pharmacy)**  
**Pharmacy Services Agreement**

The \_\_\_\_\_ (Wilderness Camp) will contract with  
\_\_\_\_\_ (Pharmacy) with all pharmacy services to the children of the  
\_\_\_\_\_ (Wilderness Camp) being provided by \_\_\_\_\_ (Pharmacy).  
The purpose of this agreement is to set forth the understanding between  
\_\_\_\_\_ (Pharmacy) and the \_\_\_\_\_ (Wilderness Camp).

**Pharmacy agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the \_\_\_\_\_ (Wilderness Camp) of any changes within thirty (30) days.

**Pharmacy agrees** to comply with and to maintain all licenses required by South Carolina law.

**Pharmacy agrees** to maintain medication records required by South Carolina law, to provide necessary records to the \_\_\_\_\_ (Wilderness Camp) and to preserve confidentiality.

**Pharmacy agrees** to fill all prescriptions ordered by \_\_\_\_\_ and have ready for pick-up no later than \_\_\_\_\_, 7 days per week. All other prescriptions will be ready for pick-up no later than \_\_\_\_\_ the following day.

**The Department of Juvenile Justice agrees** to compensate the Pharmacy at Medicaid rates for all pharmacy services and medications provided to \_\_\_\_\_ (Wilderness Camp) juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either part elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one-year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify \_\_\_\_\_ (Wilderness Camp) of its intention in writing (90) days prior to the anniversary date.

**(Pharmacy Name)**

**(Wilderness Camp)**

\_\_\_\_\_  
**Pharmacy Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Signature**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**Date** \_\_\_\_\_

**(Name of Pharmacy)**  
**Pharmacy Services Agreement**

**South Carolina Department of Juvenile Justice**

\_\_\_\_\_  
**Deputy Director, Administrative Services**  
**SC Department of Juvenile Justice**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

**(Physician Name or Group)  
Agreement**

The \_\_\_\_\_ (Wilderness Camp) will contract with \_\_\_\_\_ (Physician or Group) to provide healthcare services to the children of the \_\_\_\_\_ (Wilderness Camp). The purpose of this agreement is to set forth the understanding between \_\_\_\_\_ (Physician or Group) and the \_\_\_\_\_ (Wilderness Camp).

**(Physician or Group) agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the \_\_\_\_\_ (Wilderness Camp) of any changes within thirty (30) days.

**(Physician or Group) agrees** to provide Board Certified Family Practitioners, mid-level providers, nurse practitioners, and/or physician assistants on site at \_\_\_\_\_ (Wilderness Camp) one day per week for approximately \_\_\_\_\_ hours.

**(Physician or Group) agrees** to conduct emergency and/or non-elective juvenile evaluations/examinations and provide treatment and services as required.

**(Physician or Group) agrees** to refer emergency cases to surgeons, hospitals, etc. When the need arises.

**The South Carolina Department of Juvenile Justice agrees** to compensate \_\_\_\_\_ (Physician or Group) at the Medicaid rates for all treatment and services provided to \_\_\_\_\_ (Wilderness Camp) juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either part elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one- year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify \_\_\_\_\_ (Wilderness Camp) of its intention in writing (90) days prior to the anniversary date.

**(Physician or Group)**

**(Wilderness Camp)**

\_\_\_\_\_  
**Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Signature**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**(Physician Name or Group)  
Agreement**

**South Carolina Department of Juvenile Justice**

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**Deputy Director, Administrative Services  
SC Department of Juvenile Justice**

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**Witness**

**Date** \_\_\_\_\_

**(Optometrist/Optomologist)**  
**Agreement**

The (Wilderness Camp) will contract with (Optometrist/Optomologist) to provide healthcare services to the children of the (Wilderness Camp). The purpose of this agreement is to set forth the understanding between (Optometrist/Optomologist) and the (Wilderness Camp).

**(Dentist or Group) agrees** to maintain liability insurance within limits set forth by South Carolina laws, and agrees to notify the Wilderness Camp of any changes within thirty (30) days.

**(Dentist or Group) agrees** to conduct juvenile emergency and/or non-elective examinations and provide treatment and services as required.

**The South Carolina Department of Juvenile Justice agrees** to compensate (Optometrist/Optomologist) at the Medicaid rates for all treatment and services provided to (Wilderness Camp) juveniles who are on transfer (community service) status.

This contract will automatically extend on each anniversary date unless either part elects not to extend the contract. Extensions may be less than, but will not exceed (number of years left in contract) additional one- year periods. If the either party elects not to extend on the anniversary date, the contractor(s) must notify (Wilderness Camp) of its intention in writing (90) days prior to the anniversary date.

**(Optometrist/Optomologist)**

**(Wilderness Camp)**

\_\_\_\_\_  
**Authorized Signature**

\_\_\_\_\_  
**Wilderness Camp Auth. Sign.**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Witness**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**(Optometrist/Ophthalmologist)  
Agreement**

**South Carolina Department of Juvenile Justice**

\_\_\_\_\_  
**Deputy Director, Administrative Services  
SC Department of Juvenile Justice**

\_\_\_\_\_  
**Witness**

**Date** \_\_\_\_\_

## ATTACHMENT 5

### State Of South Carolina Department Of Juvenile Justice POLICIES AND PROCEDURES

Authority: Inspector General	Policy No.: I-3.2	Page: 1 of 9
Title: Reporting Events		
Related Statutes/Regulations:		
October 1, 2006 <b>Effective Date</b>	SIGNED/William R. Byars, Jr. William R. Byars, Jr. Director	

**PURPOSE:** The Department of Juvenile Justice (DJJ) staff will document significant events, serious incidents and accidents, and other significant information occurring at and/or related to juveniles, employees, volunteers, visitors, DJJ facilities, programs, schools, offices, and work-sites.

#### **PROCEDURAL GUIDELINES:**

##### A. Definitions

1. Event: An act, situation, incident, or information that requires documenting for the purposes of one or more of the following reasons:
  - a. For review by a manager.
  - b. For support of action based on safety or security issues.
  - c. For investigation.
  - d. For criminal prosecution.
  - e. For administrative sanctions.
  - f. For auditing for financial purposes.
  - g. For maintaining historical records.
  - h. For data collection.
2. DJJ Event Report (Form I-3.2A): A written report that is required for each incident, accident, injury or other significant event that occurs involving juveniles, employees, volunteers, and/or visitors occurring at and/or related to DJJ. The report is to be completed by the employee observing or having knowledge of the event. Other employees observing/having knowledge of the event may also be required by their supervisor to complete a report, depending on the circumstances and nature of the specific event. All event reports will be completed prior to the employee ending his/her daily tour of duty and submitted to the employee's supervisor for review.

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3. Supplemental Event Report (Form I-3.2B): A written report to document information found subsequent to the original event/incident (e.g., additional pertinent information obtained following the initial report, recapture of escaped juveniles, subsequent arrests of staff or juveniles, report of dropped charges against staff or juveniles, etc.).
4. Event Reporting Management Information System (ERMIS): An advanced computer database used for collecting events for purposes of investigation, information gathering, and management review.
5. ERMIS Site Reporters: The DJJ designated and trained staff members at each site responsible for reporting required ERMIS information to the Office of the Inspector General/DJJ Police Dispatch Unit.
6. Performance Based Standards (PbS): The selected set of standards and goals that DJJ uses to prepare continuous improvement plans based on data, outcome measures, expected practices, and processes.
7. PbS Site Manager: The DJJ designated and trained staff member at each site responsible for reporting required PbS information.
8. TIP Line: A confidential telephonic reporting system for employees and volunteers to use to report information directly to the Office of the Inspector General.

#### B. Training Requirements

All staff will receive training in Reporting Events as part of the initial DJJ Employee Orientation Program. Juvenile Correctional Officers and Residential Specialists will receive training in the Event Reporting Management Information System (ERMIS) as part of their on-the-job training.

#### C. Required Reportable Events

Required reportable events are listed on the DJJ Required Event Reporting (Attachment I-3.2A).

1. The DJJ Event Report (Form I-3.2A) is required for the event/incident types described and listed on the attachment. These may include, but are not limited to ERMIS, PbS, Court Report, Use of Force, Juvenile Major Rule Violation, and/or Juvenile Minor Rule Violation).
2. When physical and/or chemical force is used, the Report on the Use of Physical/Chemical Force (Forms H-2.12A/B) must be submitted.

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3. The supervisor will use sound judgment and discretion to determine when an event not listed/described on the DJJ Required Event Reporting list needs to be documented and reported.
- D. Supplemental information received subsequent to the initial Event Report will be documented on the DJJ Supplemental Event Report (Form I-3.2B).
- E. Tip Line (# 1-866-313-0073)

The DJJ Inspector General operates a toll free “Tip Line” which may be utilized by all DJJ employees, statewide. This line is a voice messaging system that allows individuals to call at anytime. Although the primary purpose for this service is to enhance the Event Reporting System, it also provides a mechanism for employees to relay ideas and concerns. Individuals calling the Tip line are asked to provide as much detail, (date, time, location, individuals involved, type incident) as possible so that the specific incident can be verified.

1. The Tip Line may be used to:
  - a. Verify an incident has already been reported.
  - b. Verify an incident should be reported.
  - c. Report suspected criminal or administrative violations.
  - d. Convey concerns or observations about current DJJ practices or procedures.
  - e. Convey ideas that may enhance services to juveniles.
  - f. Convey ideas that may enhance daily operational procedures.
  - g. Convey ideas that may save dollars for the department.
2. The Tip Line may not be used:
  - a. For an individual that was involved in an incident/event to report his/her involvement in the incident/event. The Investigator will conduct interviews of persons involved, when necessary.
  - b. To delay the reporting guidelines required by ERMIS.
  - c. As a substitute for ERMIS reporting.
  - d. To report emergencies.

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#### F. Responsibilities

1. The Supervisor will ensure that serious incidents, accidents, and events are immediately reported to their respective Manager. Each Manager will ensure that a report is made to their respective Executive Manager. Executive Managers will determine those events of which they wish to be notified and the time frames of notification.
2. County/Facility/School/Office Managers will ensure that each incident, accident, and significant event occurring at their work site is properly and promptly reported and that records and files meet the reporting requirements.
3. Staff at detention centers, evaluation centers, long-term facilities, programs, county offices, group homes, wilderness camps, administrative offices, and contract facilities are expected to follow the guidelines set forth in this policy.

#### G. Review

The supervisor/manager receiving an Event Report from an employee will review the document and verify that it is legible, thorough, fact-based, and complete. The supervisor/manager may correct grammatical and sentence structure errors but may not change the content of the report. When the report lacks significant information, the supervisor/manager will have the employee provide the missing information as soon as possible. A report will not be held from submission while waiting for additional information. A DJJ Supplemental Event Report (Form I-3.2B) will be completed and submitted as soon as possible after the information is obtained.

#### H. Confidentiality of Event Reports

The original Event Report will be maintained at the site in the administrative files for 3 years and then forwarded to DJJ Central Records in compliance with DJJ Policy B-5.5, Retention and Disposition of Departmental Records. Only persons authorized by the supervisor/manager or Inspector General's Office may access and photocopy Event Reports. Photocopies will be made and distributed to employees who need to know the information (e.g., Classification Case Managers, Clinicians, Disciplinary Staff, and/or DJJ Investigators).

#### I. Event Reporting Management Information System (ERMIS)

The Office of the Inspector General (OIG) will maintain the ERMIS database containing information on events occurring within any location associated with DJJ, including facilities, county offices, group homes, contract facilities and administrative offices. ERMIS reports may be made on a statewide basis, 24-hours per day, 7 days per week. They are accepted at the OIG during routine office hours and at the DJJ Police Dispatch Unit during all other hours.

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# 1. ERMIS Reporting Guidelines

- a. Administrators of DJJ and contractual facilities will ensure that a staff trained in ERMIS reporting is on duty each shift and available on a 24-hour, 7 day basis to serve as ERMIS Site Reporters.
- b. All events listed in the Priority 1 and Priority 2 columns of the DJJ Required Event Reporting list (Attachment I-3.2A) will be immediately reported directly to the designated ERMIS Site Reporter.
- c. The ERMIS Site Reporter will review and verify the information on the DJJ Event Report (Form I-3.2A) prior to submitting the information as an ERMIS Report to the IOG/DJJ Police Dispatch Unit.
  - 1) For Priority 1 events, the Site Reporter will immediately call the DJJ Police Dispatch Unit and immediately fax the Event Report to the DJJ Police Section.
  - 2) For Priority 2 events, the Site Reporter will fax the Event Report to the DJJ Police Section within 24 hours after the occurrence of the event or the next business day if the event occurred on a weekend or holiday. (Priority 2 events should not be called in unless there is uncertainty about whether the event is Priority 1 or 2.)

2. d. Upon contact, the Dispatch Unit staff will prompt the Site Reporter for required information. The Dispatch Unit staff will enter the information into ERMIS as it is being reported. When all required information is entered, the Dispatch Unit staff will issue the Site Reporter an ERMIS reference number to document on the Event Report. Entering this number on the Event Report form will provide the Site Reporter with verification that the event was called in and a reference number for future reference. ERMIS Reporting Time Frames.

Reporting in a timely manner is critical to the success and final outcome of an investigation. It is preferable that an event be reported to ERMIS in a timely manner rather than the report being delayed to gather additional information. If significant information is obtained after the ERMIS filing of an Event Report, the initial report may later be supplemented. Personal opinions and/or verbal commentary are unnecessary until such time as an investigator requests the information.

- a. Reportable ERMIS events will be assigned to one of two categories, Priority 1 or Priority 2, as described in the DJJ Required Event Reporting (Attachment I-3.2A). The reporting time frame will commence when the staff member is made aware of the event or allegation.

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- b. Priority 1 events will be reported immediately following knowledge of the occurrence.
- c. Priority 2 events will be reported within 24 hours, or the next business day if the event occurs after business hours, on a weekend, or holiday.
- d. If there is a question as to the priority type of an event, it will be assumed that it is a Priority 1 and a report of the event immediately will be made. If the event warrants a change in priority type, that change will be determined by the OIG and made following report of the event.

### 3. OIG Handling of ERMIS Reported Events

- a. After receiving an ERMIS Report and entering all pertinent information into the ERMIS database, the Dispatch Unit will notify the OIG by telephone that a new report has been entered into the system and the report will be transmitted via e-mail.
- b. Reports of Priority 1 events that are received after business hours, on weekends, or on holidays will be referred to the on-call OIG staff member. These reports will be handled immediately to ensure timely gathering of vital, time-sensitive information.
- c. The Chief of Investigations will access the ERMIS Report, review the information, and either:
  - 1) Classify the event as to priority, and make assignment for action, if applicable, to one or more of the following areas:
    - A) The DJJ Investigations Section for investigation of criminal activity.
    - B) The Compliance and Inspections Section for management review of policy violations.
    - C) The Compliance and Inspections Section for administrative review for safety and/or security violations.
    - D) The Juvenile and Family Relations Section for grievance actions.
    - E) The Internal Audits Section for audit purposes.

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- 2) Enter the event for statistical tracking purposes only.
  - 3) Forward the event to another DJJ office to handle (e.g., Human Resources).
  - 4) Return the event to the responsible manager to handle.
  - 5) Upon approval of the IG, refer the event to an office outside of DJJ (e.g., South Carolina Law Enforcement Division).
- d. Assignments made to areas other than DJJ Police will be forwarded via e-mail to the appropriate OIG section chief, who will review the report and assign the investigation to the appropriate staff member.
  - e. Event reports will be assigned daily based on criteria established by the OIG, with all classification and assignment information entered into the ERMIS database. Details relative to referrals and assignments of cases to outside agencies will be entered in ERMIS by designated staff of the OIG.
  - f. Upon completion of an assignment, a report will be submitted to the appropriate OIG section chief for review and determination of action to be taken. This information will be entered in ERMIS by the section supervisor at that time.
  - g. Results from completed cases will be distributed to appropriate DJJ management for necessary administrative corrective action. Action taken by entities outside the OIG will be forwarded to the OIG for entry into ERMIS. Any criminal or judicial dispositions resulting from a case will also be entered into ERMIS.
4. Confidentiality of ERMIS Reports, Information, and System

Access to events and information contained in ERMIS will be limited by the Inspector General. The opening screen of ERMIS will display the names of authorized users and viewers and their assigned levels of access. The restricted access will be closely monitored for the security and accuracy of the database.

5. Cumulative ERMIS Reports

The OIG will prepare a monthly statistical report and a Facility Incident Log based on information contained in ERMIS. This information will be disseminated to management for use in ad hoc statistical reports to aid in long range planning, forecasting, projecting budgetary and staffing needs, responding to departmental or legislative requests and requests for public records. An early alert component will enable identification of systemic issues. The information will also be used in preparing the Monthly Statistical Report submitted to SLED.

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6. Falsification of ERMIS Reports or Failure to Report

If it is determined through the course of an investigation that a staff member interfered with a juvenile in the filing of a report, or failed to submit/report an Event Report, failed to act on a request for assistance by a juvenile, retaliated against or intimidated a juvenile for participating in the reporting process, or knowingly falsified information in the reporting of an event, appropriate disciplinary action will be taken in accordance with DJJ Policy B-3.15, Progressive Employee Discipline. Juveniles filing false reports will be charged through the Juvenile Disciplinary Hearings process. These charges will be initiated by the OIG and filed with the appropriate office or facility.

J. Performance Based-Standards (PbS)

1. Each facility participating in the PbS process will forward those DJJ Event Reports required to be reported to PbS (Attachment I-3.2A) to the PbS Site Manager.

2. PbS Reporting Guidelines

The Site Manager will ensure that the appropriate information on the DJJ Event Report is reported on the PbS Incident Report.

3. PbS Reporting Time Frames

DJJ will enter PbS required information a minimum of once per week. Data collected by PbS will be done according to their schedule.

4. Site Manager Handling of Reported PbS Incidents

The Site Manager will receive all PbS incidents and ensure that information is accurate and complete and keyed into the PbS portal.

5. Access to PbS Incidents and Information

Access to PbS information and data will be available to all DJJ employees within that facility, the DJJ Standards Team, and the DJJ Office of Policy and Planning. Results will be used to evaluate programs, services, and security operations and to develop improvement plans.

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K. Retention

All forms and reports will be filed in a report file maintained in a secure area not available to unauthorized staff or juveniles. Files will be retained at the site for 3 years, with the most current 12 months available for immediate access. At the end of year 3, the file will be forwarded to DJJ Central Records consistent with DJJ Policy B-5.5, Retention and Disposition of Departmental Records.

**RELATED FORMS AND ATTACHMENTS:**

Attachment I-3.2A, DJJ Required Event Reporting

Form I-3.2A, DJJ Event Report

Form I-3.2B, DJJ Supplemental Event Report

**SCOPE:** This policy applies to all employees, volunteers, programs, providers, and facilities.

**LOCAL PROCEDURAL GUIDE:** Not required.

**TRAINING REQUIREMENT:**

All employees are required to review this policy within 30 days of its publication.

**SOUTH CAROLINA DEPARTMENT OF JUVENILE JUSTICE**  
**Required Event Reporting**

**INSTRUCTIONS:** This document is to be used as a referral source to identify the written report(s) required for the specific event. This list includes, but is not limited to, events that must be documented on the DJJ Event Report (Form I-3.2A) and submitted to the Facility/Office Manager for appropriate distribution and action. Additional required reports are identified in the corresponding columns. The employee will determine the type of event based on the description and will submit the report(s) identified.

**Type and Description of Event:** The events listed and described are required to be reported using the DJJ Event Report. Supervisors should use sound judgment and discretion to determine whether or not an event not listed should be reported.

**ERMIS Priority 1 and ERMIS Priority 2:** The Office of the Inspector General (OIG) maintains an Event Reporting Management Information System (ERMIS) database to record and track serious events occurring within any location associated with DJJ. Reportable ERMIS events will be assigned to one of two categories, Priority 1 or Priority 2. The reporting time frame will commence when an employee is aware of the event or alleged event. If there is a question as to the priority type of an event, it will be assumed that it is a Priority 1 and a report of the event immediately will be made. If the event warrants a change in priority type, that change will be determined by the OIG and made following report of the event.

Priority 1 events will be reported immediately following knowledge of the occurrence. The Site ERMIS Reporter will immediately call the DJJ Police Dispatch Unit and immediately fax the Event Report to the DJJ Police Section. Priority 2 events will be reported within 24 hours, or the next business day if the event occurs after business hours, on a weekend, or holiday. The Site ERMIS Reporter will fax the Event Report to the DJJ Police Section within 24 hours after the occurrence of the event or the next business day if the event occurred on a weekend or holiday. (Priority 2 events should not be called in unless there is uncertainty about whether the event is Priority 1 or 2.)

**Performance-based Standards:** Each facility participating in the PbS process will forward those DJJ Event Reports required to be reported to PbS to the PbS Site Coordinator. The Site Coordinator will ensure that the appropriate information on the DJJ Event Report is keyed into the PbS portal.

**Legal Office Report:** The designated manager at each secure facility will collect and maintain copies of DJJ Event Reports and supporting documentation for incidents of juvenile-on-juvenile horseplay, fight, and assault. A log will be maintained and verified with the Health Services log. The manager will submit the required log to the DJJ Legal Office each month.

**Juvenile Major Rule Violation:** The Report of Major Rule Violation (Form G-9.20A) will be prepared in addition to the DJJ Event Report to document a juvenile's major rule violation.

**Juvenile Minor Rule Violation:** The Juvenile Minor Rule Violation and Progressive Discipline Action Report (Form G-9.19A) will be prepared for minor behavior/category 2 offenses. If the staff member refers the matter to the Facility Disciplinarian to handle, he/she will also complete the DJJ Event Report (Form I-3.2A).

**NOTE:** Serious injury is defined at DJJ as an injury that requires medical treatment by a doctor, nurse practitioner, or emergency medical technician.

Type and Description of Event Required to be reported using the DJJ Event Report (Form I-3.2A)	ERMIS Priority 1	ERMIS Priority 2	Performance- Based Standards	Legal Office Report	Juvenile Major Rule Violation	Juvenile Minor Rule Violation	Use of Force
Any incident that results in a juvenile's mechanical or physical restraint, confinement, or injury (serious or not serious)			X				
Abuse (neglect) allegation of any type of serious neglect of a juvenile (actual or suspected) that involves/requires community medical evaluation or treatment	X		Founded Case				
Abuse (physical) allegation of any type of serious physical abuse (actual or suspected) involving/requiring community medical evaluation or treatment	X		Founded Case				
Abuse (sexual) allegation of a juvenile (actual or suspected) of any degree or nature	X		Founded Case				
Abuse reported to DJJ, but allegedly occurred while the juvenile was under the supervision of any other agency/entity		X					
Abuse (neglect) allegation of any type of neglect where no medical evaluation or treatment was required		X	Founded Case				
Abuse (physical) allegation of any type of physical abuse where a medical evaluation or treatment was not required		X	Founded Case				
Abuse - all other allegations of a staff-on-juvenile abuse that are not previously listed		X	Founded Case				
Accident that results in personal injury to any person		X	X				
Accident that results in any property loss or damage			X				
Arrest of a DJJ employee for criminal activity on or off the job	X						
Arson/attempted arson by a juvenile to any property	X		X		912		
Assault and battery juvenile-on-juvenile			X	X	904		
Assault and battery juvenile-on-staff (any location)		X	X	X	904		
Assault and battery on any other person (not juvenile or staff)		X	X	X	904		
Battery by/to a juvenile or staff (inappropriate physical contact)						807	
Bloodborne pathogen exposure to any person	X						
Bomb Threat	X		If evacuation				
Closure (temporary or permanent) of any DJJ office/facility/area due to disaster, fire, disease, or other hazard	X		X				
Complicity to an ERMIS Priority 1 event	X						
Complicity to an ERMIS Priority 2 event		X					
Complicity to any major rule violation code					905		
Complicity to any minor rule violation code						X	

Contraband – possession, use, display, distribution, and/or discovery of any person with illegal drugs, alcohol, or substances containing alcohol	X		X		913		
Contraband – possession, use, display, distribution and/or discovery of any person with prescribed medication, pornography, and/or money		X	X		901		
Contraband – possession, use, display, distribution, and/or discovery of any type of weapon	X		X		901		
Creating a health, safety, or fire hazard					900		
Damaging, defacing, or destructing of any property			X			810	
Damage of employee, intern, volunteer, guest, visitor personal property/vehicle while on DJJ property		X					

Type and Description of Event Required to be reported using the DJJ Event Report (Form I-3.2A)	ERMIS Priority 1	ERMIS Priority 2	Performance- Based Standards	Legal Office Report	Juvenile Major Rule Violation	Juvenile Minor Rule Violation	Use of Force
Death of a juvenile, employee, or any person in a DJJ facility, contracted facility, while on DJJ owned or contracted property, and/or while in the custody of DJJ staff, or while at community activities or appointments	X		X				
Disorderly Conduct by a juvenile						800	
Disrespect by a juvenile						801	
Disturbances within, in, or around a DJJ facility, office, or area	X						
Drugs – allegations of possession, use, and/or distribution of drugs or other type of drug involvement by DJJ staff, juvenile, or other person providing services to DJJ	X						
Escaping/attempting to escape/conspiring to escape from detention, evaluation center or other secure facility, group home, wilderness program, mental health, mental retardation, or other similar community residence program, or while during transport, escort or while on community activities or appointments	X		X		910		
Fight with injury (serious)			X	X	906		
Fight without injury			X	X		809	
Fire equipment use or accidental discharge		X					
Fire of any type or size on DJJ owned or contracted property	X		X				
Fire safety code hazard and/or violation	X						
Forgery/fraud						808	
Gang activity involving juveniles and/or staff		X					
Horseplay with or without injury or with potential to cause injury				X		811	
Hostage situation	X		X				
Inappropriate physical contact (Juvenile with another person)						807	

Inappropriate relationship with juvenile (Employee or any other person not a juvenile)	X						
Indecent exposure						813	
Injury (*SERIOUS) to any person (juvenile, employee, other) while on DJJ property/contracted property that requires medical treatment by a doctor, nurse practitioner, or emergency medical technician	X		X				
Injury to any person (juvenile, employee, other) while on DJJ property/contracted property that does not require medical treatment or that requires minor medical treatment (not required to be administered by a doctor, nurse practitioner, or emergency medical technician)		X	X				
Making a false statement to or against another person						805	
Medication theft/loss – controlled medication	X						
Medication theft/loss – non-controlled medication							
Medication reaction							
Misconduct (Employee or other person not a juvenile) - misuse of State property or funds, fraud, release of confidential information, photographing juveniles, Internet, falsification of information, failure to report information, giving/receiving gifts from juvenile and/or juvenile's family members		X					
OC Spray intentional discharge (see Use of Chemical Force)	X						
OC Spray accidental discharge		X					
<b>Type and Description of Event Required to be reported using the DJJ Event Report (Form I-3.2A)</b>	<b>ERMIS Priority 1</b>	<b>ERMIS Priority 2</b>	<b>Performance- Based Standards</b>	<b>Legal Office Report</b>	<b>Juvenile Major Rule Violation</b>	<b>Juvenile Minor Rule Violation</b>	<b>Use of Force</b>
Out of place						803	
Policy violation not otherwise listed on this document							
Quarantining of any DJJ state owned or contracted property of area due to disease	X		X				
Refusing to obey verbal or written instructions						802	
Relocation of a living unit of juveniles for any reason	X	X					
Riot – engaging in a major riot	X				909		
Riot – inciting a major riot	X				908		
Romantic relationship – allegation of consensual romantic relationship between any person and a juvenile or a juvenile and juvenile	X						
Security equipment theft/loss (key, lock, radio, ammunition, state cell phone, restraint device, suicide kit)	X		X				
Security violation at any DJJ location by any person (not a juvenile)							
Self-mutilation							
Sexual assault of any type involving any person while on State owned	X		X	X	903		

or contracted property, or while under the custody of DJJ							
Sexual misconduct or other sexual acting out misbehavior, not including indecent exposure		X			902		
Staff-on-Juvenile sexual harassment			Founded Case				
Staff-on-juvenile sexual misconduct			Founded Case				
Stealing/possession of stolen property			X			806	
Suicide (actual) or serious suicide attempt	X		X				
Surveillance equipment tampering/destructing by any person		X			915		
Threat – serious to employee on or off-duty		X					
Threatening conduct						804	
Tool theft/loss		X	X				
Under the influence of illegal drugs, alcohol or other substance (not juvenile)		X					
Under the influence of illegal drugs, alcohol or other substance (juvenile)					914		
Unauthorized property – possession, use, distribution, and/or discovery						812	
Use of chemical force	X		X				H-2.12B
Use of physical force		X	X				H-2.12A
Utility loss for more than 2 hours (heat, water, air, telephone)							
Vehicle accident (personal occurring on DJJ property)		X					
Vehicle accident (state vehicle at any location)	X						
Vehicle theft (personal occurring while on DJJ property)	X						
Vehicle theft (state vehicle at any location)	X						
Vehicle traffic violation while operating a state vehicle at any location							
Visitor termination			X				
Workplace violence	X		X				

# SOUTH CAROLINA DEPARTMENT OF JUVENILE JUSTICE

## DJJ Event Report

*INSTRUCTIONS: This document is used to record events, incidents, accidents, injuries, and other significant information required to be reported. The DJJ Required Event Reporting List (Attachment I-3.2A) will be used as a guide to determine which events are required to be reported. Supervisors will use sound judgment to determine if an event not listed should be documented.*

### ERMIS INFORMATION:

ERMIS Priority Event? (No/Priority 1/Priority 2)	Reported via Phone/Fax	Date Reported	Time Reported	ERMIS Site Reporter's Name	Title	ERMIS NUMBER

### EVENT INFORMATION:

Date of Event		Time of Event		Facility/Office Where Event Occurred				
Date of This Report		Time of This Report		Specific Area within Facility Office Where Event Occurred				
Name(s) of Juvenile(s) Involved		DJJ#(s)	Assigned Facility/Unit	Race	Gender	Age	V=Victim P=Perpetrator W=Witness	** Medical Treatment (See Key)
Name(s) of Other Person(s) Involved (Not juveniles)		S=Staff V=Volunteer O= Other	Contact Phone #	Race	Gender	Age	V=Victim P=Perpetrator W=Witness	
Description of the Event (This section will expand with typing, as necessary or use supplemental report)								
Evidence, Attached Documents, Other Significant Information								
Print Name of Employee Writing This Report				Title				
Signature of Person Writing This Report				Date				
Signature of Supervisor Reviewing This Report				Date				

#### \*\* Medical Treatment Information Key

**Serious** = Treated by a Doctor, Nurse Practitioner, or Emergency Medical Technician

**Minor** = 1<sup>st</sup> Aid Treatment (ice pack, bandaid, ointment, etc.)

**Refused** = Juvenile refused medical treatment (Juvenile signs refusal form with the medical staff)

**None**= No medical treatment was necessary.

**SOUTH CAROLINA DEPARTMENT OF JUVENILE JUSTICE**  
**DJJ Supplemental Event Report**

*INSTRUCTIONS: This document is used to record additional information, or subsequent information not previously reported.*

**ERMIS INFORMATION:**

ERMIS Priority Event? (No/Priority 1/Priority 2)	ERMIS NUMBER

**EVENT INFORMATION:**

Date of Original Event	Time of Original Event	Facility/Office Where Original Event Occurred	
Date of This Report	Time of This Report	Name of Employee Writing the Original Report	
Supplemental Information (This section will expand with typing, as necessary)			
Evidence, Attached Documents, Other Significant Information			
Print Name of Employee Writing This Report		Titl e	
Signature of Person Writing This Report		Dat e	
Signature of Supervisor Reviewing This Report		Dat e	

**MONTHLY REPORT FORMAT**

ATTACHMENT 6

**SOUTH CAROLINA DEPARTMENT OF JUVENILE JUSTICE**  
**Community Alternatives Section**  
**PROGRAM**

**MONTHLY REPORT**

**MONTH/YEAR:** \_\_\_\_\_

<b>Part 1: Statistical Information</b>	<u><b>Monthly</b></u>	<u><b>Year to Date</b></u>
I. Admissions	_____	_____
II. Gender:		
Males	_____	_____
Females	_____	_____
III. Race:		
African American	_____	_____
Caucasian	_____	_____
Hispanic	_____	_____
Other	_____	_____
IV. Age upon Admission	_____	_____
V. Length of Stay for Successful Terminations	_____	_____
VI. Length of Stay for Unsuccessful Terminations	_____	_____
VII. Overall Average Length of Stay	_____	_____
VIII. Units of Service	_____	_____
IX. Utilization Percentage	_____	_____
X. <u>Number of Discharges:</u>		
A. Successful	_____	_____
B. Unsuccessful	_____	_____
XI. <u>Placements:</u>		
A. Higher Level of Care	_____	_____
B. Same Level of Care	_____	_____
C. Lower Level of Care	_____	_____

**Community Alternatives**  
**Monthly Report**  
**Page Two**

- D. In Patient Psychiatric
- E. In Patient Substance Abuse
- F. Home
- G. Secure Custody
- H. Other (Specify)

_____	_____
_____	_____
_____	_____
_____	_____

XII. County Distribution of Juveniles Admitted

(See Attached)

**Part 2: Administrative Information**

**Monthly**      **Year to Date**

I. Education:

- A. # Graduate Equivalency Diplomas
- B. # High School Graduates

_____	_____
_____	_____

II. ERMIS Priority 1 Incidents

_____	_____
-------	-------

- A. Incident 1:
  - 1. Type
  - 2. Juvenile
  - 3. Race
  - 4. Staff
  - 5. Medical Attention
  - 6. Physical Restraint
  - 7. Action Taken
- B. Incident 2: (etc.)

I. Personnel:

- A. Personnel Changes
- B. Personnel Actions
- C. Staff Training

II. Regulatory Inspections and Certifications

III. Programming

IV. Budgetary

VII. Director's Comments

Addendum to Community Alternatives Monthly Report  
Marine and Wilderness Programs  
Effective July 1, 2013

Factor	Monthly	Year to Date
Referrals Received		
Referrals Accepted		
Average Grade Level Improvement in Math and Reading of those who left during the month	Math	Math
	Reading	Reading
# Juveniles Receiving Vocational Instruction of those who left during the month		
# Juveniles with Substantiated Abuse and Neglect Allegations at the program during the month		
# of Juveniles who Suffered from Accidental at the program during the month (Off site medical tx required)		
# of Juveniles Injured in an Assault at the program during the month (Off site medical tx required)		
# Runaways at the program during the month		
# Escapes at the program during the month		
# Juveniles Visiting with their Family (on site or by video) during the month. (This would be a total number of individual juveniles who met with their family during the month.)		
Juveniles discharged within prescribed Time Frames		
Juveniles discharged after one 30 day extension		
Juveniles discharged with more than one extension		

**FINANCIAL REPORT**

<b>1.</b>	<b>Provider Name and Address:</b>		
<b>2.</b>	<b>Reporting Period:</b>	<b>From:</b>	<b>To:</b>
<b>3.</b>	<b>Site Location(s) covered by this report:</b>		
<b>4.</b>	<b>Provider Agency Owned by:</b>		
<b>5.</b>	<b>Type of Control (check one):</b> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span><b>Private for Profit ( )</b></span> <span><b>Private Non Profit ( )</b></span> </div>		

**CERTIFICATION BY OFFICER OR ADMINISTRATOR OF PROVIDER**

I do solemnly swear (or affirm) that I have examined the information contained in this report; that all such information has been prepared from the books and records of the provider named within; that the aforesaid information is true and correct to the best of my knowledge and belief.

<b>Signature (Officer or Administrator of Provider:</b>	<b>Title:</b>	<b>Date:</b>
<b>Report Prepared By:</b>	<b>Title:</b>	<b>Telephone:</b>

Provider's Name: \_\_\_\_\_

For the period beginning \_\_\_\_\_ and ending \_\_\_\_\_

Service Name: \_\_\_\_\_

### BUDGET & EXPENSE REPORT

PERSONNEL SERVICES	EXPENSES
1. Personnel - Paid	
2. Personnel - In-Kind and Volunteer	
3. Social Security	
4. Health Insurance	
5. Retirement	
6. Workers Compensation	
7. Unemployment Compensation	
8. Other Employer Contributions	
9. Sub-Total Employer Paid Benefits	
10. <b>TOTAL PERSONNEL SERVICES</b>	

Provider's Name: \_\_\_\_\_

For the period beginning \_\_\_\_\_ and ending \_\_\_\_\_

Service Name: \_\_\_\_\_

**PERSONNEL SCHEDULE: \*\*\*\***

<b>Position</b>	<b>Total Hours Worked</b>	<b>Total Salary and Wages</b>	<b>Total Personnel (including fringe)</b>
<b>A. Personnel - Paid</b>			
<b>Total Personnel - Paid</b>			
<b>B. Personnel – In-Kind and Volunteer</b>			
<b>Total Personnel – In-Kind and Volunteer</b>			
<b>C. TOTAL PERSONNEL</b>			

Provider's Name: \_\_\_\_\_

For the period beginning \_\_\_\_\_ and ending \_\_\_\_\_

Service Name: \_\_\_\_\_

### BUDGET & EXPENSE REPORT

CONTRACTUAL SERVICES	EXPENSES
Printing & Advertising (recruitment of staff)	
Utilities (water, sewerage, etc.)	
Telephone & Telegraph	
Auditing, Accounting & Finance	
Building Repairs	
Other Contractual	
<b>TOTAL CONTRACTUAL SERVICES</b>	

SUPPLIES	EXPENSES
Office Supplies	
Household, Laundry & Janitorial Supplies	
Educational Supplies	
Motor Vehicle Supplies (fuel, motor oil, etc.)	
Postage	
Food	
Building Maintenance Supplies	
Clothing	
Recreational Supplies	
Medical Supplies	
Other Supplies (including personal needs)	
<b>TOTAL SUPPLIES</b>	

FIXED CHARGES	EXPENSES
Rent/Lease – Real Property	
Rent/Lease – Photocopying Equipment	
Rent/Lease – Motor Vehicle	
Insurance (other than employee, fringe)	
Other	
<b>TOTAL FIXED CHARGES</b>	

Provider's Name: \_\_\_\_\_

For the period beginning \_\_\_\_\_ and ending \_\_\_\_\_

Service Name: \_\_\_\_\_

### BUDGET & EXPENSE REPORT

TRAVEL	EXPENSES
Travel (meals, lodging, private automobile)*	
<b>TOTAL TRAVEL</b>	

\*May not exceed State of South Carolina Travel Policies.

EQUIPMENT	EXPENSES
Interest	
Equipment Depreciation	
<b>TOTAL EQUIPMENT</b>	

PERMANENT IMPROVEMENTS	EXPENSES
Interest	
Permanent Improvements Depreciation	
<b>TOTAL PERMANENT IMPROVEMENTS</b>	

TRAINING & EDUCATION OF STAFF (including membership)	EXPENSES
Training and Education	
<b>TOTAL TRAINING AND EDUCATION</b>	

INDIRECT COSTS	EXPENSES
Indirect Costs	
<b>TOTAL INDIRECT COSTS</b>	

<b>GRAND TOTAL PROGRAM EXPENSES</b>	
-------------------------------------	--

Provider's Name: \_\_\_\_\_

For the period beginning \_\_\_\_\_ and ending \_\_\_\_\_

Service Name: \_\_\_\_\_

### REVENUE REPORT

REVENUES RECEIVED	AMOUNT
1. Contributions	
2. Other (please specify)	
10. TOTAL REVENUES	

# **OFFICE OF COMMUNITY ALTERNATIVES**

## **GEORGETOWN MARINE INSTITUTE**

### **VENDOR RESPONSE**



# State of South Carolina

Request for Proposal

Solicitation Number: 5400007516  
Date Issued: April 22, 2014  
Procurement Officer: CHRIS MANOS  
Phone: 803-737-4917  
E-Mail Address: CMANOS@mmo.sc.gov

DESCRIPTION: **MARINE & WILDERNESS CAMPS FOR SCDJJ**

USING GOVERNMENTAL UNIT: **SCDJJ Administration**

**RECEIVED**  
MAY 22 2014

*The Term "Offer" Means Your "Bid" or "Proposal". Unless submitted on-line, your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Offer" provision.*

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

**MAILING ADDRESS:**

Materials Management Office  
PO Box 101103  
Columbia SC 29211

**PHYSICAL ADDRESS:**

Materials Management Office  
Capital Center  
1201 Main Street, Suite 600  
Columbia SC 29201

SUBMIT OFFER BY (Opening Date/Time): **05/22/2014 2:30 P.M.** (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: **04/30/2014 5:00 P.M.** (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: **See Section IV Information for Offerors to Submit on page 32**

CONFERENCE TYPE: **Not Applicable**  
DATE & TIME:

LOCATION: **Not Applicable**

(As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions)

**AWARD &  
AMENDMENTS**

Award will be posted on **06/17/2014**. The award, this solicitation, any amendments, and any related notices will be posted at the following web address: <http://www.procurement.sc.gov>

Unless submitted on-line, you must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date.  
(See "Signing Your Offer" and "Electronic Signature" provisions.)

**NAME OF OFFEROR**

**AMIkids, Inc.**

(full legal name of business submitting the offer)

Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

**AUTHORIZED SIGNATURE**

**Signature Redacted**

(Person must be authorized to submit binding offer to contract on behalf of Offeror.)

**TAXPAYER IDENTIFICATION NO.**

**23-7440836**

(See "Taxpayer Identification Number" provision)

**TITLE**

**Chief Financial Officer**

(business title of person signing above)

**STATE VENDOR NO.**

**7000023007**

(Register to Obtain S.C. Vendor No. at [www.procurement.sc.gov](http://www.procurement.sc.gov))

**PRINTED NAME**

**William Griffin**

(printed name of person signing above)

**DATE SIGNED**

**STATE OF INCORPORATION**

**Florida**

(If you are a corporation, identify the state of incorporation.)

OFFEROR'S TYPE OF ENTITY: (Check one)

(See "Signing Your Offer" provision.)

☐ Sole Proprietorship

☐ Partnership

☐ Other \_\_\_\_\_

☐ Corporate entity (not tax-exempt)

☒ Corporation (tax-exempt)

☐ Government entity (federal, state, or local)

**PAGE TWO****(Return Page Two with Your Offer)****HOME OFFICE ADDRESS** (Address for offeror's home office / principal place of business)5915 Benjamin Center Drive  
Tampa, FL 33634-5269**NOTICE ADDRESS** (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)

Judy Estren

Contact Person

5915 Benjamin Center Drive

Address

Tampa, FL 33634-5269

City/State/Zip

813-887-3300

Area Code - Number - Extension

813-889-8092

Facsimile

jle@amikids.org; cxa@amikids.org

E-mail Address

**PAYMENT ADDRESS** (Address to which payments will be sent.)  
(See "Payment" clause)☒ Payment Address same as Home Office Address  
☐ Payment Address same as Notice Address (check only one)**ORDER ADDRESS** (Address to which purchase orders will be sent)  
(See "Purchase Orders and "Contract Documents" clauses)☒ Order Address same as Home Office Address  
☐ Order Address same as Notice Address (check only one)**ACKNOWLEDGMENT OF AMENDMENTS**

Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

**DISCOUNT FOR  
PROMPT PAYMENT**  
(See "Discount for Prompt  
Payment" clause)

10 Calendar Days (%)

20 Calendar Days (%)

30 Calendar Days (%)

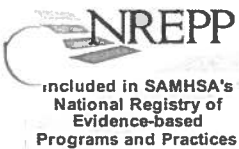
\_\_\_\_ Calendar Days (%)

**Preferences do not apply to Request for Proposals per SC Consolidated Procurement Code Section 11-35-1524, part (5).**

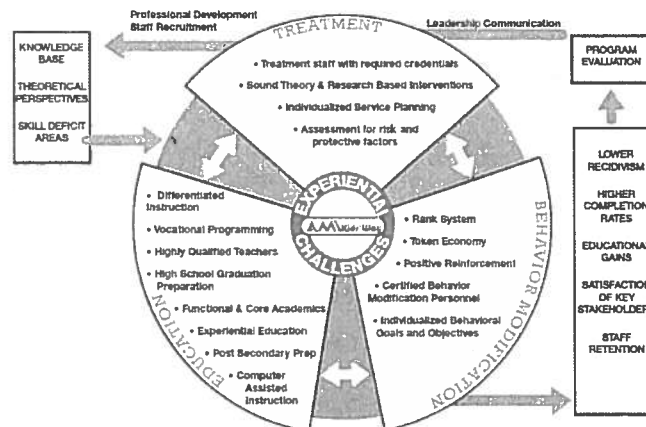
## A. Program Description

### Why AMIKids?

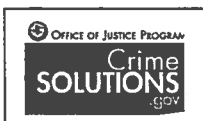
AMIKids Georgetown Marine Institute opened for operation in 1989 and has since been providing excellent services to the youth of South Carolina by continually meeting and/or exceeding the State Standards for Residential Services. AMIKids Georgetown Marine Institute is a different kind of youth programming that embraces the notion of creating a family environment and encouraging **gender specific growth** while still providing a safe, effective program model. AMIKids Georgetown Marine Institute creates an environment that teaches boys incarceration is not their future and shows them how to thrive in a caring environment so they are prepared for the responsibilities that come from being a strong, positive male figure in their families and community. AMIKids Georgetown Marine Institute teaches the youth critical thinking skills and prepares them to make choices that ensure a bright, crime-free future. AMIKids Georgetown Marine Institute residential programming blends the AMIKids evidence-based Personal Growth Model® (APGM®) and the AMIKids Day Treatment Model, which has been deemed a “promising model” into a highly effective, safe residential setting. The result is a **seamless continuum of care** encompassing educational; vocational; behavior modification; and **treatment** including trauma informed care to ensure we are treating the youth as a whole and touching on any and all possible needs.



The AMIKids Personal Growth Model® (APGM®) has been nationally-recognized by the Substance Abuse Mental Health Services Administration (SAMHSA) National Registry of Evidence-based Programs and Practices as an “evidence-based” model for improving the academic achievement of at-risk students, and for reducing delinquent behavior.



The AMIKids Day Treatment Model has been designated as a “promising model” by the Office of Juvenile Justice and Delinquency Prevention for reducing re-offending behaviors and is the only Day Treatment Model recognized.



The AMIKids Day Treatment Model has been listed as an evidence-based “promising model” by the Office of Justice Programs Crime Solutions.



AMKids, Inc. has been recommended for national education accreditation by AdvancEd.

AMKids Georgetown Marine Institute offers a variety of program services meeting and/or exceeding South Carolina State Standards, contract requirements and the requirements of this RFP.

#### **Staffing for AMKids Georgetown Marine Institute**

AMKids Georgetown Marine Institute provides for **24** hour awake supervision (exceeding the 16 hours required), 365 days a year meeting and/or **exceeding the required staffing of 1 Direct Care or HSP to every 8 youth awake; 1 Direct Care or HSP to every 10 youth during sleep; and 1 HSP to every 16 youth for services.** Schedules are developed and posted for all staff for coverage to ensure proper ratios at all times including emergencies and sick leave.

#### **Recruitment**

AMKids, Inc. has designed and implemented hiring practices to identify, recruit and hire a qualified diverse staff that embodies the organizational values. AMKids, Inc. Human Resources department posts all open positions internally as well as externally to expedite hiring of qualified and trained individuals. As a service to AMKids Georgetown Marine Institute, AMKids, Inc. provides the following to ensure highly qualified and appropriate staff for all open, required and budgeted positions:

- 1) Post positions internally and externally
- 2) Subscribe to Teachers-Teachers.com to ensure expedited hiring of highly qualified educational candidates
- 3) Development of partnerships with local colleges and universities for applicant pools, trainings, etc.
- 4) National Directors of MH & Education Services reviews resume submissions for degree and licensure qualifications / experience (Mental Health & Education positions only).
- 5) Best candidates are invited for a face-to-face on-site interview. Interview consists of a combination of position specific and AMKids interview questions
- 6) National and Regional Directors recommend candidates for hire (for leadership positions). Those candidates meet with the facility Executive Director (if hired) to ensure all leadership are in agreement regarding final decisions.
- 7) Job offers are made contingent upon background screening, reference checks, degree confirmation, licensure confirmation, etc.



## **Collection and Maintenance of Documentation of Current Licenses, Certifications, Qualifications and Experience**

Prior to employment, all potential employees go through a rigorous screening process to include, but is not limited to:

- Background Screening with an **Eligible** rating **prior** to employment or access to youth
- A driver's license check **prior** to employment and/or access to youth: *employees with more than two moving violations in the last three years or a DUI/DWI within the last seven years are prohibited from operating institute vehicles or transporting students under any circumstances.*
- Drug screening
- License, certification, education and experience qualification check
- Reference check
- Sexual offender check

## **Hiring**

All new employees meeting the criteria and being offered employment at AMIkids Georgetown Marine Institute will complete new hire paperwork and work documents including signing the job description and the AMIkids Employee Handbook acknowledgement. The Handbook explains expected professionalism, code of conduct, and rules and policies an employee must adhere.

## **Staffing Levels**

In order to meet the staffing ratio and delivery of services, AMIkids Georgetown Marine Institute will ensure staffing of highly qualified and trained individuals for all positions that meet and/or exceed State Standards for those positions. AMIkids Georgetown Marine Institute currently employs all required staff needed to meet and/or exceed the expectations and requirements of RFP 5400007516 as well as the current State Standards for Residential Services (Group Care Intermediate Services).

The AMIkids Georgetown Marine Institute proposed organizational chart allows for the required direct care and HSP staff members to meet the requirements of this RFP. The schedules and organizational chart accounts for coverage for vacation time, sick time, leave, as well as student trips and off-site activities. In addition, AMIkids also ensures *all* team members are trained in all Department requirements to be considered "direct care" and team members cross train with other departments to ensure coverage in emergencies.

## **Retention**

AMIkids Georgetown Marine Institute recognizes that staff retention is critical to ensure continuity of excellent services but also to allow for the development of meaningful relationships between staff and youth. In an effort to increase staff retention, the following strategies have been employed:

- *Competency Development Planning:* to ensure team members are adequately prepared for the job, an assessment of their job related competencies is required. Identified strengths that are critical to job performance are prioritized and an individualized competency development plan is created. By ensuring that a team member has the required skills to perform the job, we hope to decrease job frustration and thereby increase retention.
- *Continuous Coaching and Feedback:* Supervisors provide continual feedback on competency development. The supervisor reviews the staff's development plan at regular intervals and provides continual coaching, training, and feedback which impacts retention by ensuring success and minimizing negative staff/supervisor interactions.
- *Access Leadership:* AMIkids employs an "open door" policy where all are involved in strategic planning and can discuss issues and concerns without fear of reprisal.
- *Competitive Salary and Benefits Package:* affordable healthcare, dental and vision plans, life insurance plans, Paid Time off (PTO) hours (sick, vacation and holiday), sabbatical options, short term disability benefits, pension and 403B plans, as well as numerous training and advancement opportunities.
- *Advancement Opportunities:* With different models in several states, AMIkids has many opportunities for employees to move, gain new experiences and be promoted. AMIkids also provides additional training and leadership opportunities like "Kids First University", online training modules, and job specific training. Employees in leadership roles or interested in becoming a leader in the organization will be invited to participate in the AMIkids Leadership University where we will help the employees realize their current skills and develop needed skills to be an effective leader.
- At AMIkids we believe in developing a *family atmosphere* for our youth and staff in order to ensure a positive working environment. Our team members become extended family members and we care for them as such.
- *Recognition* for years of service, successes and efforts. Employees are rewarded for years of service in 5 year intervals; are incented and recognized for service above and beyond; rewarded for improvement initiatives and meeting or exceeding expected outcomes; recognized for being a leader in exemplifying the organization's mission and values and for being a leader in their particular discipline (Executive Director of the Year, Educator of the Year, etc.).

### **Staff Training and Development**

AMIkids Georgetown Marine Institute maintains employees' training files, schedules required training with internal and external resources, and ensures contractual established pre-service and annual training standards are adhered. AMIkids, Inc. assists the programs with development of New Hire and Annual Training Plans and with scheduling trainings to ensure compliance with Evidence Based Practices and Department requirements and offers employees



opportunities during annual departmental conferences (Mental Health, Leadership, Education, etc.) as well as synchronous trainings available throughout the year.

Each year, an annual training calendar is developed and made available to all staff members identifying specific training topics and dates. Supervisory staff, as part of their annual hours of required in-service training, will complete training in areas of management, leadership, personal accountability, employee relations, communications or fiscal training. The training hours are completed through AMIkids supervisory meetings and online trainings. AMIkids, Inc. manages an online training calendar on the AMIkids Intranet Site along with Moodle interactive web-based trainings that are available to all team members. Although each program is responsible for their own training needs, as a service to the programs, AMIkids, Inc. employs a National Director of Training and Leadership Development to assist the programs and exceed Department requirements in training and retention, schedule needed trainings, research new opportunities, develop new leaders, and create specific trainings based on program and organization needs. This position is also responsible for maintaining and updating the AMIkids Intranet Training Site and Moodle trainings.

#### **Competency and Leadership Development Process**

In addition to the required contractual and AMIkids training, staff engages in a competency development process, an individualized training plan focused on the job specific skills the staff member needs to be successful. Position specific Competency Sets are comprised of the interpersonal, leadership, contextual and technical skills an individual needs to do their respective job at a high level.

For mid-level managers or those in supervisory roles, AMIkids, Inc. developed the AMIkids Leadership University (ALU). The ALU focuses on developing supervisory leadership skills as well as basic management training. The participants receive training that provides them with the tools they need to be more effective in their current role and prepare them for future leadership positions within AMIkids. The face-to-face, web-based and conference call training sessions over the course of 12 weeks (Intro ALU Seminar, Regional Cohort Workshop, ALU Success Seminar) are designed around current trends, needs, and best practices in Juvenile Justice, Mental Health and Education. The managers are assigned to a cohort with designated senior Executive Directors who provide coaching and mentoring throughout the process. In addition to the standard foundation training topics, managers participate in individualized training topics/assignments based on the 360 Competency Evaluation Assessment and performance observations. Training are a combination of live seminars and on-demand courses via eLearning. Employee participation is tracked by the Human Resources and Training Departments of AMIkids, Inc. Participants continue their individualized training over the course of 1 year to ensure competency.

#### **Delivery of Training**

AMIkids Georgetown Marine Institute staff members receive training through the following mechanisms:

- Instructor Led: Crisis Training (through CPI) and First Aid/CPR/AED, Evidence Based trainings, conferences, etc.
- Individualized Instruction Workbooks: Staff has access to a series of workbooks for AMIkids required training. The workbooks are designed to be self-study.
- AMIkids Professional Development Website: Staff has access to on-line training in a variety of AMIkids required and optional training through the web on the AMIkids Intranet, Professional Development Website and Moodle.
- AMIkids Synchronous Training: AMIkids provides numerous training events throughout the year through video conferencing, web chats, face-to-face meetings, etc.

### AMIkids Georgetown Marine Institute Behavior Modification System

The history of AMIkids is firmly rooted in instances of caring adults bonding with youth who are disconnected from society and need guidance to become responsible and productive citizens. Positive bonding with an adult is crucial to the development of a capacity for adaptive responses to change, and growth into a healthy and functional adult. In order to ensure youth take the pro-social path, AMIkids Georgetown Marine Institute implements activities, interventions and staff behaviors that meet the needs of the youth. Specifically, AMIkids utilizes the three Social Development Model theories (Control Theory, Social Learning Theory & Differential Learning Theory) to create a systemized process for staff to bond with the youth. Staff members receive training in Effective Pro-Social Modeling and bonding techniques for Mentors, Role Models and Advisors as part of their orientation process.

AMIkids Georgetown Marine Institute provides a structured behavior modification program designed to guide youth toward internalized decision-making, help youth develop short- and long-term pro-social behavioral repertoires, and facilitate the daily management of behavior throughout the program. AMIkids Georgetown Marine Institute employs procedures and techniques of behavior modification and utilizes a sophisticated system, which is derived from the operant conditioning model, and includes procedures such as positive and negative reinforcement, extinction, differential reinforcement, modeling, successive approximations, shaping, discrimination training, punishment, maintenance, and generalization. Operant conditioning is the arrangement of consequences to develop, strengthen, and shape behavior. The most common operant conditioning procedure used in AMIkids Georgetown Marine Institute is *Positive Reinforcement*. Positive Reinforcement requires immediate reinforcing consequences that strengthen the behavior, such as providing praise, public acknowledgement, or tokens. Arranging for immediate and meaningful consequences to follow appropriate behavior increases the likelihood that similar behavior will occur again under similar circumstances. Initially, only small steps and components of complex behavioral repertoires are reinforced. Successive approximations are differentially reinforced throughout a continuum of arranged contingencies that lead to the development of complex repertoires and eventually



the long-term target behaviors. AMKids Georgetown Marine Institute averages, at a minimum, 7 instances of positive reinforcement for every 1 instance of punishment to have an effective behavior modification system.

The **AMKids Targeted Behavioral Interventions™** system is a critical component of the AMKids Personal Growth Model®, which utilizes operant conditioning to develop or strengthen desired pro-social behaviors while at the same time eliminating or weakening anti-social behaviors. Youth progress through a structured and integrated level system based on the attainment of individualized goals from treatment, education, and behavior modification identified in the youths' Individualized Care Plan. The progression through the **level system** is one of the contingencies for graduation from the program. Complimentary to the level system, AMKids Georgetown Marine Institute employs a token economy system utilizing a structured point card designed to reward appropriate behavior while discouraging inappropriate choices.

The **rank/phase system** is designed to determine when a youth is eligible for release. Based upon the needs of the youth, an individualized rank/phase system is created. AMKids Georgetown Marine Institute employs an eight (8) rank/phase system where each youth has a number of goals they must achieve in order to move up in rank. With each subsequent promotion, the youth earns privileges that correspond directly with the rank/phase. Once the youth reaches the final rank/phase they are eligible for release. This system allows the youth to have a direct influence on how long they stay in a program and prevents them from just "doing time".

The **point card system** addresses youth behavior in terms of following programmatic expectations. In specific intervals throughout the day, youth receive numeric feedback on how well they have met, or not met, the programmatic expectations. The earning, or subsequent not earning of points, provides them with access to specific privileges. At this level, program wide positive behavioral expectations and procedures are taught to promote pro-social skills building in youth.

The **token economy system** is the positive skill building system with use of token, activity and/or social reinforcers designed to provide immediate positive reinforcement for youth meeting targeted **individualized goals related to their Individualized Care Plan**. The goals on the plan are divided into smaller goals, or successive approximations, that lead to the youth displaying the desired behavior. Youth will have between one and three goals on their point card they are working on in any given week. All staff is aware of the goals and provides tokens for proper display of the behavior. Once the behavior has occurred at an acceptable rate or frequency, a new goal is established and the process is repeated until the end result is obtained. The tokens the youth earns can be exchanged for a variety of items including, but not limited to:

- Purchasing items in the program store – youth may trade tokens for such goods as special hygiene/personal items, gifts for family members (especially around holidays), specialty snack items, etc.

- Use of free time – youth may trade tokens in for extra sports time, TV time, TV preference, time in a game room
- Use of common areas and/or equipment – area(s) established for the youth to relax, utilize gaming systems, music equipment (mp3 players, iPods, etc.), read, watch TV, movies, etc. These areas will be furnished with items desired by the youth in the program. This will be determined by surveys given to the youth at program and the program will make every attempt to incorporate the youth's interests into the room to ensure it is a true incentive.

Program staff focuses on assisting youth in identifying problems and gaining insights into the relationship between their attitudes and their behavior, gaining control over their behavior, developing social skills, and understanding the harmful consequences of their negative behavior.

**Individual and group counseling** sessions are provided to address individual issues and engage the youth as a group in addressing behavioral concerns and pertinent topics. Counseling services are designed to assist the youth in dealing with specific and crisis counseling needs. Youth needing services beyond the expertise of the program staff are referred to an appropriate agency or practitioner.

Program staff focuses on assisting youth in identifying problems and gaining insights into the relationship between their attitudes and their behavior, gaining control over their behavior, **developing social and life skills**, and understanding the harmful consequences of their negative behavior.

#### ***AMKids Georgetown Marine Institute Discipline and Behavioral Interventions***

AMKids Georgetown Marine Institute has written, fair and consistent behavior intervention procedures that set guidelines to ensure positive behavior is encouraged and consequences for negative behavior have a direct correlation to the undesired behavior. Consequences are administered displaying dignity and respect to the youth. The behavior modification system allows for staff to supervise youth visually and observe them at all times following the supervision requirements of the program, State Standards and contract guidelines. Supervision ratios may be increased as behavior warrants, i.e., suicide watch, or when exhibiting excessively aggressive behavior.

Consequences and sanctions for program rule violations, performed on an individual basis, are therapeutic and directly related to the seriousness of the inappropriate behavior exhibited. Consequences prohibit group punishment and require supervisory review of major disciplinary action. Program staff do not administer consequences to a youth in such a way that it denies basic rights to meals, clothing, sleep, health care services, school, exercise, correspondence privileges, contact with parents/guardians, legal assistance or religious needs. All program staff and youth understand youth are **not permitted** to discipline other youth. The AMKids *behavior modification system* allows the youth to assume increased responsibility for their behavior and methods of achieving appropriate pro-social behavior. The program involves the youth in



assessing their behavior, and in setting goals for responsible behavior. Staff utilizes self-reflective communication to engage youth in understanding the impact of their behaviors on academic, social and personal goals and determine what motivates the student to perform. The process focuses on the desired behavioral change from the perspective of how it benefits the youth rather than the staff.

An adolescents' social and academic life are interconnected. For example, children who have few friends, actively rejected by their peer group, or victims of bullying are unlikely to have the cognitive and emotional resources to be able to do well in school (Juvonen & Graham, 2001). Being bullied by one's peers can have long-term effects on a youth's personal development. AMIkids has successfully implemented strategies to combat bullying in the program environment. As an organization, staff are trained to focus on pro-social skill building, conflict mediation and creation of a "safe" environment. AMIkids programs promote normalcy, mentoring, positive role modeling and positive staff to student interactions.

Youth are given counseling and verbal reminders as initial strategies for behavior management. Examples of consequences for noncompliance could be, but are not limited to: extra chores or work projects, facility restrictions, and/or suspension of privileges. If necessary, a reconvening of the Multi-Disciplinary team will take place, and parent/guardian/custodian or juvenile probation officer notification will occur. No disciplinary methods or measures will be used that may be considered mistreatment, improper, or inappropriate. Youth are not subjected to cruel, harsh, unusual, or unnecessary discipline and corporal punishment is never implemented.

AMIkids is committed to the creation of a therapeutic milieu for youth where care and safety of the youth is of primary importance, physical restraint is only used, by trained staff, when necessary to protect the youth from injury to self or others. Staff members are trained in the implementation of Nonviolent Crisis Intervention (Crisis Prevention Institute, Inc.) which is nationally recognized by the California Clearinghouse on Evidence-Based Practice for Child Welfare. A restrictive procedure may not be used in a punitive manner, for the convenience of staff, or as a program substitution. AMIkids believes that staff members should be competent role models able to provide appropriate guidance to youth in our care. All AMIkids program staff members that have direct contact with youth receive training in the approved behavior modification system. All staff and supervisors are trained in the theory and practice of the behavior modification system in order to ensure fidelity and integrity of implementation. Staff receives on-going training and supervision through face-to-face, on-site, and web-based learning management systems. Staff are trained to create therapeutic opportunities by exploring the underlying issues of behavior, help youth develop alternative coping skills and relationship building.

### Restorative Justice Programming

AMIkids Georgetown Marine Institute uses ***Evidence Based Practices to protect the public safety and teach students Restorative Justice and the impact of their crimes.*** The Evidence



Based Practices AMIkids Georgetown Marine Institute utilizes are listed below and expanded further in this document. Many of the services are evidence-based or promising practices as identified by the Substance Abuse and Mental Health Services Association (SAMHSA) or listed on SAMHSA's National Registry of Evidence Based Practices and Programs (NREPP), or by the Office of Juvenile Justice Policy and Prevention (OJJDP):

- Aggression Replacement Training® (ART®)
- MET/CBT-12
- Trauma Focused Cognitive Behavioral Therapy (TF-CBT)
- Skillstreaming
- Family Intervention and Counseling
- The Council for Boys and Young Men (The Council)

Using a combination of Evidence Based Interventions such as ART® and Service Learning Projects to learn principles of Restorative Justice, we show youth how to apply these principles to everyday life. AMIkids addresses the Restorative Justice Components via each and every aspect of the program.

- **Personal Accountability** is addressed via the AMIkids Behavior Modification System, Experiential Education, The Council, Family Intervention and Counseling, and Aggression Replacement Training;
- **Consequences of Making Decisions** is addressed by the AMIkids Behavior Modification Systems, The Council, and Aggression Replacement Training,
- **Ripple Effect of Crime** is addressed via the AMIkids Behavior Modification System, and Aggression Replacement Training;
- **Managing Conflict** is addressed by Aggression Replacement Training, MET/CBT-12, The Council, AMIkids Behavior Modification System, and Experiential Education;
- **Reparations** are achieved via Community Service projects, Listen and Learn, Service Learning Projects, and MET/CBT-12. Additionally, all Court ordered sanctions are addressed while in the program so long as residential facility is the appropriate venue, (i.e. letters of apology to victims).

A critical element to address the Restorative Justice Components with the youth is for the youth to take ownership of his actions and his need to implement change. In order for the youth to be successful, it is critical that the youth be allowed to be heard and to be an active participant in the planning and development of his treatment, education and rehabilitative measures. The youth is included in every multi-disciplinary treatment team (MDT) meeting to initially establish his goals and course of treatment, as well as all further meetings to address his progress. The program also employs a **youth council** so they have the opportunity to discuss program components.

In AMIkids programs, we believe each youth should have a “**voice**” and our family atmosphere fosters this belief. In addition to our family atmosphere, each youth is assigned an advisor and HSP that he can talk to, voice his opinions to, and bond. The advisor acts as the youth's advocate and helps him work through the program, deal with issues/concerns, etc.

To ensure the youth have a **collective “voice”** at the program, the program utilizes a **Youth Council**. The goals of the Youth Council are not only to allow the youth to voice opinions and concerns but also to teach citizenship education, which is a major goal of secondary education. All youth need to understand the rights, duties and privileges of being a citizen of a democratic society and be competent in the performance of these duties and privileges. The Youth Council is structured to allow the youth to help the program leadership decide on incentives and activities, community service activities, service learning projects, snacks and food menu items, as well as to voice concerns over youth issues, make suggestions and correct issues/concerns the youth population may be experiencing.

AMIkids also uses **Experiential Education Challenge Events** to take youth out of their comfort zones and stretch the limits with which they are accustomed. These activities are designed to usher youth into the mindset to learn and explore new things. The *Challenge Events* provide youth and families with an opportunity to develop interest in positive leisure activities. In addition to the daily activities, counseling, and academic interventions, Challenge activities and daily experiential education programming (e.g., low ropes course activities, hands on learning, trust activities, and games) are used to develop self-confidence and trust skills. The desired outcomes for the youth are to rekindle their interest in productive family relationships and to learn life skills necessary for a successful adulthood.

The *challenge events* culminate in “high challenge/high success” activities in which the youth will utilize the various skills and abilities they have learned and practiced. The ultimate goal is to instill confidence, self-esteem, and trust which will lead the youth to recognize that they are worthy and deserving of a positive, crime-free future.

Every youth has an opportunity to participate in the *AMIkids Signature Challenge Events* based on their interests, behaviors, and progress in the program. The Challenge Events are a way for the youth to develop stronger bonds with each other, staff members, and family members invited to participate. These events promote a true sense of family and community through fun, excitement, trust and bonding, all while giving the children and families an experience of a lifetime. Examples of the AMIkids Signature Challenge Events include:

- **Winter Challenge Event** – this annual event, held in January or February, includes academic, life skill, and athletic competitions to promote the development of pro-social skills and goal attainment.
- **Capitol Classroom Event** – this annual activity brings the classroom to the state’s Capitol each spring to expose students to the activities and practices, which constitute state and federal government. Students get the opportunity to meet their local legislators, state government officials, and to tour the Capitol Building as part of a set of standards based learning objectives.
- **Summer Challenge Event** –similar to the Winter Challenge Event, this event includes summer-related activities like swimming competitions.

- **Presidential Dive Challenge Event** – each summer, AMIkids trains selected, qualified students from its various programs in scuba diving. The training culminates in a dive trip to the Florida Keys. Each year the AMIkids organization certifies almost 100 students in scuba.
- **White Water Rafting/Rappelling Event** –AMIkids programs train and develop teams to travel to Cherokee, North Carolina to participate to raft the Nantahala River. This event promotes team work and pro-social behaviors. During this event, children are also trained to rappel down the side of a 30 foot wall which promotes goal attainment and personal growth. As part of the educational component of this event, children prepare and study the culture of the Cherokee Indian Nation and participate in a tour of the Cherokee National Museum.

*Community service* projects provide youth an opportunity to give back to the community, to gain awareness of the impact of their offenses, to redevelop a sense of responsibility and ownership for their actions and encourage accountability, pro-social skills competency development, and aid in repairing/building relationships in the community. They also allow the youth to complete any court ordered community service sanctions and High School community service hours needed for graduation. The projects range from disaster relief awareness and education to fundraising and addressing local community needs. AMIkids Georgetown Marine Institute will strive to maintain all of the relationships already built in the community while fostering new opportunities.

The community service project component also includes the AMIkids Signature Event, ***Service from the Heart***, wherein the youth participate in two national signature events. One event focuses on working with senior citizens at Senior Centers, local home-based senior citizens, and nursing homes. We have seen amazing bonding and mentoring come from the senior Service from the Heart projects. These youth become like grandchildren to the seniors and the seniors become mentors for the youth. The rewarding feeling goes both ways in this environment and gives a sense of worth to both the senior and the youth. For the second event, each program identifies a ***Service from the Heart*** project that is individualized to the needs of their community. Getting involved in the community and taking ownership in the project instills a sense of belonging and worth to the youth who would normally not be in the position to give back in such a way. Currently, AMIkids Georgetown Marine Institute participates in community activities as listed below:

- HUGS for Horses
- Habitat
- Keep Georgetown Beautiful
- Adopt A Highway
- United Way
- Service from the Heart
- Ice Party for Seniors
- Pancake Breakfast
- Bridge to Bridge Run



- OctoberFest
- Thanksgiving Dinner

## Evidence-Based Delinquency and Mental Health/Substance Abuse Interventions

AMKids Georgetown Marine Institute Mental and Behavioral Health Services Teams are comprised of Health Services Professionals (HSP) who meet all the qualifications set forth in the South Carolina Department of Social Services (DSS) [licensing requirements Chapter 114 authority: 1981 Code Sections 63-11-30]. Human Service Professionals complete individualized assessments of each youth creating a unique client picture and individualized treatment pathway. The development of an individualized treatment pathway for clients is inclusive of a holistic approach that incorporates cultural strengths, family identified service needs, and evidence-based delinquency, behavioral modification and mental health Interventions.

AMKids Georgetown Marine Institute mental health philosophy is aligned with the principles of restorative justice and based on the belief that in order to effect change the **entire family system** must be addressed to ensure a safe successful return into the community and home. In addition, the mental and behavioral health team operates as an agent of change in the facilitation of increased functioning not only for the youth with whom there is primary contact, but within the family and community to which they are returning. The APGM® is the guiding service philosophy for improving the lives of children and encapsulates the culture and values of AMKids which emphasize: communication, pro-social bonds, gender specific and culturally-relevant interventions, provided in a family atmosphere incorporating evidence based treatment and other services addressing the assessed risk and needs of the youth.

The AMKids Clinical Model consists of licensed clinicians, masters level clinicians and Certified Addiction Professionals. The clinical philosophy of AMKids, Inc. is based on a cognitive behavioral, person centered and trauma focused perspective. Each youth participates in a comprehensive assessment upon enrollment in AMKids Georgetown Marine Institute. All assessments and direct services integrate the following concepts and theories:

**Family Centered:** a role of the Human Services Professional is to integrate the family, caregiver, and existing family and community supports (as appropriate) within the clinical and behavioral services and interventions.

**Culturally informed:** All AMKids Georgetown Marine Institute services recognize and respect cultural differences; these differences are identified as strengths and integrated into individual care plans.

**Strengths Based:** All assessments, treatment plans, care plans, and interventions are designed to identify the youth's strengths.

**Non-Punitive Motivation:** All behavior modification systems used at AMKids Georgetown Marine Institute are designed to reinforce positive behavior.



**Person Centered:** All care plans, after-care plans, treatment plans and behavior interventions are based on the individual and address individual's needs and strengths. AMIkids Georgetown Marine Institute creates a therapeutic environment in which effective services can be provided to each client based upon his individual needs. It is paramount that the individuality of the client be reflected in all assessments, interventions, case plans and treatment goals.

**Trauma Informed:** All services provided at AMIkids Georgetown Marine Institute are performed from a trauma informed perspective. The impact of trauma in the lives of the youth and families served can be significant. HSP's strive to implement services that recognize and support healing from past trauma. Trauma specific interventions are designed exclusively to address the consequences of trauma in the individual and to facilitate healing. AMIkids Georgetown Marine Institute adheres to the following principles of interventions for clients with a history of trauma:

We understand

1. The survivor's need to be respected, informed, connected and hopeful regarding their own recovery
2. The interrelation between trauma and symptoms of trauma (e.g., substance abuse, eating disorders, depression and anxiety)
3. The need to work in a collaborative way with survivors, family and friends of the survivor and other human service agencies in a manner that will empower survivors

**Plan for Implementation of Services to the Youth:** AMIkids Georgetown Marine Institute utilizes an Individualized Care Plan process for each youth, which includes:

- An individualized assessment to ascertain the course of treatment needed;
- Identification of discharge criteria at intake;
- The development of the care plan;
- The assignment to the services to be rendered;
- Monitoring of youth progress throughout the care plan; reassessment on a regularly prescribed basis to ensure success of the services delivered;
- Release from the plan upon successful completion from the program and the creation of a transition plan 90 days prior to release from the program.

**Assessments:** The initial assessment captures each youth's family strengths and needs, behavioral needs and identification of problem areas to develop a comprehensive unique client picture. In concert with the residential staffing form received at intake, the HSP will complete the YASI assessment tool within 7-14 days of a youth's arrival on campus. The services YASI recommends generally match the identified services on the residential staffing form. At times, the YASI will identify additional service needs for the youth. At intake, the Casey LifeSkills assessment is also completed with each youth.

### **Intake Screening**

The Intake Screening includes a review of precautionary observation, mental health, and/or psychotropic medications. Specifically the intake assessor will review documentation to assess:

- A current or history of suicide ideation, threats, self-inflicted injury or self-mutilation;



- A current or history of psychiatric disturbance, mental health problems, and/or substance dependence;
- Recent major loss,
- Crisis stabilization and
- Psychiatric hospitalization,

Any youth identified as a risk as a result of an Intake Screening for Suicide Risk are referred to community partners for an in depth evaluation immediately (within 24 hours). Youth with “risks” identifying non-emergency mental health or substance abuse issues are referred to community providers within 7 days of assessment.

**Care Plan:** Within thirty days of admission, each youth will receive an Individualized Care Plan (ICP). A multi-disciplinary team (MDT) will develop an appropriate care plan with goals addressing the youth’s assessed individualized needs and includes the type of services delivered, as well as the frequency and duration of interventions. This team includes, but is not limited to, the youth, the family, program representatives (HSP, Medical, Mental Health, Education, and Behavior Modification), DJJ representative, and local community service providers. Goals set by the treatment team are integrated throughout the program, therefore the entire team, as a collective unit, reinforce the youth’s goals. Additionally, during the development of the Individual Care Plan, the team identifies/reviews the transition goals and discharge criteria.

The MDT, in developing the ICP, addresses areas such as drug and alcohol issues, sexual abuse, physical abuse, anger management, social skills, recreation, independent living skills, behavior modification, academic issues, vocation and transitional preparation skills. When mental health and/or substance abuse treatment needs are evident, the Care Plan includes coordination with the identified clinical staff, which will develop a separate individualized mental health/substance abuse treatment plan. The Care Plan establishes goals and strategies that are specific to the youth’s risks and needs. Behavioral and attitudinal change is accomplished through participation in evidenced based and promising practice delinquency interventions as well as the behavior modification system. Other aspects of the program include school programming, restitution, community service, recreational activities, and learning to develop healthy pro-social relationships with adults and peers. The goal for the youth is to return to the community in the shortest possible time with the best probability of success and permanency. This goal, accomplished by holding youth accountable for their behaviors, assists them with developing the skills needed to make good choices, staying on task with constructive goals, and identifying areas in which they can begin to repair harm to victims and the community.

This comprehensive approach facilitates treatment of a diverse array of youth needs. AMikids Georgetown Marine Institute addresses the criminogenic risks and needs through services as follows:

- **Anger/Aggression:** ART, MET/ CBT-12;
- **Family/Relationships:** family therapy, Family Intervention and Counseling, The Council and TF-CBT;

- **Substance Abuse:** Individual therapy, MET/CBT-12, group therapy, and family therapy;
- **Mental Health:** individual therapy, TF-CBT, group therapy, and family therapy;
- **Current use of Free Time:** Recreational Flag Football Leagues, Casey Life Skills, The Council, vocational programming;
- **Employability:** Casey Life Skills, vocational programming, WorkKeys, WIA, work placement agencies, education;
- **Skills:** ART and The Council;
- **Attitudes/Behaviors:** ART, AMikids Behavior Modification System, Casey Life Skills;
- **Academics:** On-site educational program (recommended for accreditation through AdvancEd)

Youth admitted to the program receive intake, orientation, screening, assessment, individualized service planning, individualized treatment planning (if indicated), and assignment to evidence-based and promising practice interventions based on individualized needs.

#### **Aggression Replacement Training (ART, 3<sup>rd</sup> edition, 2010)**

ART is a recognized evidence-based delinquency intervention which will be provided to youth with identified risk as per the R-PACT assessment in aggression, antisocial attitudes and skills and who require intervention in anger control, moral reasoning or skill deficits as identified on the Biopsychosocial Assessment. ART will be provided by 2 ART trained staff in a closed group with 6-8 youth to start a cohort and held according to the program schedule.

Session lengths vary based on skill and group topic, but will last 1-2 hours. A minimum of 6 cycles will be offered yearly based on staggering schedule of admits/discharges as well as variability in census. Each group session will be documented with the attendance sheet per implementation guidelines and weekly progress notes.

#### **Motivational Enhancement Therapy/Cognitive Behavioral Therapy (MET/CBT-12) for Adolescent Cannabis Users (Volumes 1-2, 2001)**

AMikids will utilize the recognized evidence-based delinquency intervention MET/CBT-12 for youth with identified risk factors per R-PACT assessment in substance abuse and who require intervention for substance use as identified on their Biopsychosocial Assessment. This intervention will be provided by a mental health or substance clinical staff meeting degree and experience requirements and who have completed the 2-day training for MET/CBT-12. 12 sessions will be held (2 individual, 10 group) in a closed group format with a minimum of 6 and a maximum of 10 youth to start the group cohort. The 1 hour individual sessions will be worked into the youth and staff member's schedule and the group sessions will be held once a week for 75 minutes. Each session will be documented with sign in sheets and progress notes following the requirements. There will be a minimum of 4 cycles a year based on the staggering schedule of admits and discharges as well as the variability in youth need.



### **Trauma-Focused Cognitive Behavioral Therapy (TF-CBT)**

TF-CBT is a Mental Health/Substance Abuse model provided to youth who are identified with a history of trauma and associated trauma-related diagnosis including Post-traumatic Stress Disorder and Acute Stress Disorder, or who are exhibiting symptoms associated with trauma response, based on the Biopsychosocial Assessment. The average duration is 12-16 sessions, based on assessment and treatment plan. Each session will be provided by the trained Therapist with a Master's Degree in Human Services or related field. Sessions will be documented with weekly progress notes meeting requirements.

### **Family Intervention and Counseling**

Families receive family counseling to help improve communication, dealing with family related issues, and assisting with transition and permanency.

### **Mental Health Services**

General crisis and Individual Counseling is addressed by Masters level HSP(s) within the program. All youth receive the AMKids Intake Screening for Suicide Risk, which includes document review. The purpose of the Suicide Screening is to determine if there is reason for concern that a severe mental health problem or suicide risk exists and to identify the need for further evaluation and referral. The Director of Treatment or Designated Licensed HSP will administer this screening in a confidential and private manner. In addition, the HSP or master level counselor shall review any psychological reports, pre-dispositional reports, and/or any other information in the youth's file to determine any documented severe mental health or suicide issues needing further referral for assessment.

### **Current Referral Agencies:**

Mental Health Counseling – Waccamaw Mental Health

Alcohol and Drug Services – Georgetown County Drug & Alcohol Commission

### **Gender Specific Programming**

AMKids understands there are distinct differences in both causality pathways and treatment of male and female juvenile offenders. Research indicates the greatest outcomes seen in male clients are when utilizing activities that foster hands-on methods of engagement. In general, males respond positively to problem solving, spatial relationships, knowledge of rules, knowledge of social hierarchy, intensity in gaming and physical activity, instant gratification, and less verbal communication styles.

In many instances, the male clients served by our programs have received flawed messages regarding the meaning of masculinity that have influenced their behaviors and identity development. Messages that being a 'real man' means avoiding emotional expression, masking

vulnerabilities , or displaying a persona of toughness, power and aggression all influence identity development and behavior of young men. In addition to the flawed messaging, there has potentially been exposure to persistent trauma or stress, which can alter the brain's ability to regulate emotion and responses to stressful situations. Therefore, to address the complex history and backgrounds of the male youths served, AMIkids individualized mental health treatment philosophy is designed to implement strategies that not only improve emotional regulation and stress management but also target the specific learning styles and needs of our youth. An additional component of AMIkids services philosophy includes redefining manhood and developing healthy male role models via mentoring.

**AMIkids will be addressing the unique needs of boys through services as follows:**

Need	Intervention
Masculinity Definitions	The Council, Cognitive Behavioral individual, group, and family therapy, Mentoring
Hands-on, Kinesthetic activities	The Council, Supportive counseling, Challenge Events, Off-campus activities, Experiential Education
Systemizing approaches	The Council, Cognitive Behavioral individual, group, and family therapy, Behavioral Modification System of Token Economy and Rank Promotion
Stress-reducing strategies for trauma: Predictability, Social Contact, Perceptions of Control, and Experientially-Based Environments	The Council, Trauma-focused programming, Cognitive Behavioral individual, group and family therapy, Behavioral Modification System, Mentoring, Experiential Education
Gender-based treatment needs: (e.g., Violence, Bullying, Aggression, Sexual Behavior and Decision Making)	The Council, AMIkids Way, MET/CBT-12, Cognitive Behavioral individual, group and family therapy, Mentoring, Health Education

**The Council for Boys and Young Men – Living a Legacy: A Right of Passage (Written 12/06, Revised 11/09, Published 2012)**

All youth admitted to the program will be assigned to The Council for Boys and Young Men (The Council). The Council is a group model that uses a strength-based approach to address developmental needs for pre-teen and adolescent males. The structured group model utilizes experiential activities, reflection, and group dialogue to address masculine topics. Experiential activities include challenges, skits, role-play, art, and games. The Council includes the *Living a Legacy: A Rite of Passage* curriculum comprised of 10 sessions including the following themes:



1) creating our council; 2) connecting our council; 3) strength through diversity; 4) mentors, role models and heroes; 5) unlocking the code; 6) healthy relationships; 7) who's the man? boys and the media; 8) conflict resolution: squash it before it starts, 9) no one walks alone; and 10) living and leaving a legacy.

The Council takes a seven step format including an opening ritual, introduction of theme, warm-up exercise, check-in, experiential/verbal activity, reflection, and closing ritual. The groups aim to strengthen prosocial values. The Council model works well in juvenile justice settings.

The Council is a Gender Specific group that will be provided to all youth in the program in a closed group with 6-10 youth to start a cohort group. The 10 sessions will be held weekly for 1.5 hours each, provided by a trained master level counselor or other staff where the primary facilitator holds a bachelor's degree in a human services or related field. When clinically appropriate, additional groups past the 10 weeks may be run with youth based on need. Group sessions will be documented with sign-in sheets and progress notes.

#### **Fidelity Monitoring for Evidence Based Interventions:**

Fidelity observations will occur once a month for each group type, which may include self-observations. Fidelity reports will be completed during the group observation and submitted to the Director of Treatment and Executive Director or designee for review. Observations will be conducted by the Director of Treatment or therapist trained in the Evidenced Based curriculum. Monthly reports will be provided to the AMIkids, Inc. Regional Director of Mental Health Services and Compliance.

#### **Education Program**

AMIkids has seen amazing improvement in youth when they are engaged in the educational/vocational process at the program. We believe in teaching the youth based on his/her ability levels, interests and learning styles. This engages the youth from the onset and keeps them stay engaged throughout the educational process. AMIkids Georgetown Marine Institute has a long history working in collaboration with the local Public School System. AMIkids Georgetown Marine Institute will continue to work collaboratively with the local school district for the provision of educational services with an emphasis on academic achievement, career education, and life skills. AMIkids Georgetown Marine Institute will ensure direct care staff and HSPs work in partnership with teachers to foster a safe and nurturing environment conducive to maximizing learning opportunities for youth. Career and technical education is taught through a collaborative partnership between AMIkids Georgetown Marine Institute, Casey Life Skills, online resources and community partners.

#### **Academic Services**

The AMIkids Georgetown Marine Institute educational component is interwoven throughout the evidence-based AMIkids Personal Growth Model<sup>®</sup>, which includes strategies that have proven to increase academic performance for the population whom we serve. The APGM<sup>®</sup> is designed to: 1) reduce risk factors that sustain delinquent behavior and academic failure, 2) lower recidivism, 3) improve completion rates, 4) facilitate educational gains, and 5) promote



supportive environments that foster personal growth. AMIkids blends individualized treatment, education, and behavior modification within a strengths-based framework to serve the specific needs of adolescents. Programs provide opportunities for accelerated remedial education, employability skills development, vocational skills training, and counseling. AMIkids Georgetown Marine Institute aims to impart values, life skills, and confidence to youth to help them make positive and productive decisions that prevent them from becoming involved in or returning to the juvenile and criminal justice systems. The effectiveness of our program is attributed to:

- Small structured family-style school setting,
- Small class size ratios,
- Data driven teaching, learning and assessment programs, with a particular focus on monitoring student mastery in the core content areas and critical thinking,
- Monthly interdisciplinary teams that include student, parent, and staff to review student progress, and
- Extensive professional development to increase administrators, faculty and staff effectiveness in implementing rigorous programs.

The AMIkids Georgetown Marine Institute educational program is founded on the core value "Kid's First!" With this value as a central guiding post, all decisions are made keeping the best interest of the youth in mind. The educational component is provided by AMIkids Georgetown Marine Institute in partnership with the local school district and SCDJJ.

The educational program establishes a culture of warmth and discipline. Students set personal academic, social and behavior goals with action plans for achieving each. Teachers and program staff provide feedback and reinforcement on those goals and expectations at the end of each classroom period. By maintaining a low teacher-student ratio of 1:15, students have greater opportunities to receive instruction and immediate feedback. In addition to the required minutes of daily class time for core content, students have the opportunity to participate in vocational and life-skills classes, tutored study periods, and experiential education activities as an academic booster session. The intense emphasis on growing academically and socially in a disciplined, family environment produces remarkable improvement in academic functioning and social development.

The hours of instruction are aligned with State requirements regarding the number of minutes required for instruction in each subject area. Upon creation of the new master schedule, the Camp will clearly delineate the daily schedule for students and staff. The AMIkids Georgetown Marine Institute educational component will follow the state law of a minimum of 180 instructional days. Our days out of school will closely reflect the SCDJJ educational calendar for holidays and extended leave time; however, there are unique elements to the AMIkids annual calendar to allow students to have the unique opportunity to participate in Experiential Challenge and Signature Events throughout the year.

**The Common Core State Standards.** The curriculum of the AMIkids Georgetown Marine Institute educational component is built on the Common Core State Standards and the



application of the APGM<sup>®</sup> differentiating instructional strategies through processes such as curriculum compacting in the continuous improvement cycle. During continuous improvement, students are pre-assessed to determine their skill level, given instruction with feedback and given a post assessment to determine if they've met 80% mastery of the prescribed learning goals.

The educational program focuses on implementing differentiated instruction for students, with interactive studies in both core and enrichment classes. As a student moves through the grade levels and rank there is an added emphasis on leadership, and managerial and organizational skills. Since students take a proactive approach toward their content areas, they have heightened meta-cognition and highly-developed critical thinking skills, along with motivation and confidence. Each student's educational performance will improve as they understand that the "how" of learning is just as important as "what" they learn within their classrooms and community.

To support the diverse content requirements for youth, distance learning/virtual education services are integrated to ensure student access to required courses to support progression towards high school graduation and/or post-secondary studies. Working in concert with the local school system requirements and regulations, the youth will have access to online learning systems such as:

- PLATO system (or other state/district approved software) – a web-based curriculum that is aligned to the Next Generation Sunshine State Standards and the National Common Core Standards. PLATO provides specific course content to help students acquire the information necessary to master the competencies required for attaining credit, GED preparation, high stakes testing preparation and credit recovery.
- 24 hour access to instructional software using the web-based system provided to students served at the program, providing adequate supervision outside of the school-day
- Life Skills/Job Readiness Skills – using the Casey Life Skills/PAYA (Preparing Adolescents for Young Adulthood) curriculum to support the development of core competencies for independent living and job preparation.

All eligible youth and/or any youth who arrives at the program with his diploma, or who obtains his diploma while at the program, will be afforded the opportunity to engage in online college courses, vocational services, and/or job placement guidance and assistance through already established or new community resources.

### **Educational Assessments**

**STAR Reading and Math Enterprise Assessment** is utilized by the AMKids Georgetown Marine Institute and is a computer-based assessment administered upon enrollment, monthly and prior to exit from the program. Based on youth scores a plan is developed and monitored in accordance with district standards to ensure the youth is making progress and his placement in



academic courses is appropriate. The STAR also predicts how a student will perform on the state standardized tests so that teachers and program staff can make adjustments and design instruction to meet the individual needs of students.

### **Coursework and Curriculum**

AMIkids Georgetown Marine Institute, upon enrollment, informs students and parents about the course curriculum and activities. Each student develops an Individual Academic Plan (IAP) signed by the student, the student's instructor, HSP and/or academic advisor, and the student's parent. AMIkids Georgetown Marine Institute coursework provides for appropriate instruction based upon the state's curriculum frameworks, course descriptions, and Common Core Standards.

Students with disabilities are provided instruction in the general education curriculum to the extent they are able to participate and progress. Accommodations are provided as specified in the student's Individual Education Plan (IEP). The accommodations specify changes in instructional strategies that are required as a result of a student's disability.

In order to effectively close the achievement gap, we must provide additional time and resources in developing an effective language arts curriculum, which revolves around the understanding that reading develops language, language develops reading and both enhance writing skills. The five strands identified in the components of the Common Core State Standards (reading, writing, listening, viewing, and speaking) provide a framework for organizing a language arts curriculum.

The overall goals of the AMIkids Georgetown Marine Institute language arts program are:

- To develop fluent readers who read for meaning and to gain knowledge;
- To help students develop an enjoyment of reading and create lifelong readers;
- To expose students to, and develop an appreciation for a wide variety of quality literature and literary genres;
- To develop a strengthened vocabulary by having greater exposure to literature;
- To enable students to use strategies to improve literal, interpretive, and critical comprehension when reading; and
- To explore careers in the communication skill areas

Promoting reading proficiency is the focus of the language arts program at the Camp. The language arts program provides students with opportunities to develop fundamental skills that enable them to engage in higher order thinking and demonstrate mastery of language and communication processes. Our students focus on fundamental skills such as: grammatical foundations, writing process, writing for a variety of genres/purposes/audiences, and all elements of research writing. Each class also includes a strong focus on vocabulary development.



Students receive intensive training in English composition, including conventions of syntax and punctuation, and demonstrate competence in written assignments. Students practice writing with strong emphasis on proper sentence and paragraph and essay organization. Additionally, middle school students also learn to prepare memos, business letters, and newspaper reports. Research papers and essays that discuss and rely extensively on sources are required throughout the curriculum; students learn how to identify appropriate sources, form a bibliography, organize the paper, and acknowledge sources properly. Students have the opportunity to develop the techniques of creative writing and the composition of poetry in forms commonly found in English-language verse (such as ballad, blank verse, sonnet, free verse, heroic couplets).

Finally, students develop the ability to prepare and deliver formal oral presentations and participate in group discussions using appropriate diction and tone. Students demonstrate intermediate level word processing skills, including the ability to write and format essays on the computer with appropriate charts, tables, and graphs.

#### *Mathematics Focus*

The goal of the mathematics program is to provide a coherent, focused curriculum based in the Common Core State Standards designed to engage students in gaining a richer, deeper, and more proficient understanding of mathematics. All mathematical ideas are presented in real-world context to help students understand how math is related and relevant to their daily lives.

Students engage in problem solving in such areas as number theory, data investigations, probability, and algebraic thinking. Advanced students are challenged with an accelerated curriculum and given opportunities to explore higher level instruction. Use of student work groups enhance the instructional experience and teach key collaborative skills.

#### *Science Focus*

All science classes are aligned to the Common Core Standards and include hands on activities to help reinforce content. AMKids Georgetown Marine Institute science program develops mastery of core vocabulary and conceptual knowledge through an inquiry led project-based learning approach.

Our science education program is based on a framework of science as the integration of science content and science process skills. This framework goes beyond the distinction between the scientific body of knowledge (facts, theories, and laws) and science process skills (observation, experimental design, data collection and analysis, and drawing conclusions), and focuses on the inextricable link between science knowledge and science skills.

For students to really *understand* science it is critical they *engage in* inquiry science activities that lead them toward a discovery and understanding of content. Merely watching others or hearing about others experience with science is not sufficient to develop the rich conceptual understanding that is expected of students. The experiential learning instructional process employed by our programs ensures students are actively involved in science both hands-on *and*



minds-on and learn both content and skills through the practice of science. Our goal is not to create good science students, but to create outstanding student scientists.

### *Social Studies Focus*

Our students participate in Social Studies curriculum through a combination of direct instruction and online content delivery (via Plato Course) with an emphasis on geography, economics, world history, civics, government, and American history influence events around the world. More depth and complexity is added through project-based learning and engaging in authentic historical research that teaches students the critical skills they need to be effective citizens in the 21st century. This requires integration of content through the study of cultures, the humanities, and literature to acquire a realization of how these events have affected individuals in their local communities and eventually career paths. Additionally, instructional delivery in the social studies curriculum allows students to identify linkages between their lived experiences and historical occurrences. The social sciences curriculum enables students to make culturally relevant connections that inform their thinking and worldview to make better choices when they transition back home.

### *Study Skills*

Study skills are a combination of organizational and time management strategies intended to help students succeed in an academic setting. The study skills program supports students in their acquisition of knowledge and skills across all curriculums. Study skills promote understanding through the direct instruction of reading and listening strategies as well as aid students in test taking and notebook organization. Study skills help students break down tasks and assist students in applying strategies to accommodate their learning styles and increase their understanding.

### **Classroom Structure**

The evidence-based AMKids Personal Growth Model<sup>®</sup> includes strategies that have proven to increase academic performance for the population of students we serve. The strategies included in the APGM<sup>®</sup> include:

- **Bell Ringers**- immediately engage students in the lesson upon entering the classroom.
- **Essential Questions**—question(s) presented prior to a lesson/unit and designed to promote critical thinking skills and focus on the main ideas.
- **Differentiated Instruction**—students have multiple options for taking in information, making sense of ideas, and expressing what they learn
- **Individualized Instruction**—focused students have multiple options for taking in information, making sense of ideas, and expressing what they learn.
- **Anchoring Activities**—activities for students as they complete lesson that help to keep students on task while also reinforcing critical skills. Activities provide extensions to lessons.

At the core of the APGM<sup>®</sup> and central to what we believe changes the lives of our students are the experiential challenges. When students are trained to face and overcome challenges the



gain greater self-worth and begin forming better personal value systems. Our experiential challenges are designed to expose our students to experiences they would not have been afforded in their typical home environment or circumstance. Students are given the opportunity to learn seamanship, deep-sea fishing, SCUBA diving, backpacking, whitewater rafting and rappelling. Through these experiences they not only learn to be self-reliant but team building and trust are also developed. Positive relationships are key to helping challenged teens build better outlooks and work ethics. They engage in these experiential challenges with their peers and staff and celebrate their successes as a community.

### **High Quality Teachers and Effective Instruction**

Effective instruction reflects the incorporation of best practice research and conventional teacher wisdom. Instruction at the AMKids is based on the understanding that children come to school at different levels of preparation and these differences have implications on classroom dynamics. Instructional personnel are expected to accept the role of teacher and create a learning environment that allows students to enter at their level of proficiency. The ability to evaluate student progress and use that data to further their learning should be demonstrated by the teacher. The effective teacher should possess the skills to function within an organization consisting of members of diverse backgrounds. Because the targeted population for the AMKids will include students who have experienced academic struggle in the traditional public school program, the implemented model will include methods and techniques, which bridge the gap between literacy and school culture as well issues that promote survival in the urban environment.

AMKids is committed to identifying, recruiting and retaining a high quality teaching staff. AMKids Georgetown Marine Institute vacancies are announced through internal human resource outlets as well as online resources such as the Center for Educator Recruitment, Retention, & Advancement – South Carolina (CERRA) and Teachers-Teachers.com. Community outlets such as radio and newspaper advertisements are used to announce vacancies as well. Vacancy announcements are posted in venues that are frequented by educators, including libraries and bookstores.

AMKids, Inc. seeks teachers who exemplify the following abilities:

- High expectations: ability to demonstrated belief that all the children can be successful when appropriately taught.
- Organizational ability: skill to plan, gather materials that create a productive classroom.
- Physical/emotional stamina: ability to persist with commitment and enthusiasm when confronted with challenging situations.
- Teaching style: capable of facilitating and coaching learning rather than simply giving direction and information.

All teachers selected for employment at AMKids Georgetown Marine Institute will meet the definition of highly qualified teachers. The three criteria set forth by this definition are:

- A bachelor's or high degree from an accredited or approved institution
- A valid full state certification
- Subject matter competency for each core academic subject assigned

AMIKids teachers participate in ongoing professional development training, including, but not limited to, the annual AMIKids Regional Training, at which they receive rigorous content-based instruction. The training provides a wonderful collaborative opportunity for the rich exchange of ideas among educators. Other professional development opportunities that support curriculum development, content mastery, cultural responsiveness, team and leadership development are available for teacher participation.

**Classroom Walkthroughs.** Through a series of scheduled and unscheduled visits by peers, mentors and administrators, teachers are evaluated based on research-based effective teaching principles. Using research-driven observational tools and resources (e.g., Marzano observation protocol), teachers are provided real-time feedback on daily instructional tasks ranging from effective use of academic engaged time to amount of positive feedback given per student.

The model is designed to create a reflective teaching environment so that teachers become the leaders in guiding their own improvement process. These forms are online and available for review to reflect growth and development across the school year. This tool is *not* used as an evaluation. It does provide feedback. The classroom walkthrough is conducted at minimum two days per week in each classroom during various academic areas.

**Lesson Plan Review.** Teachers are required to submit weekly lesson plans. These serve as documentation that the school presents a rigorous standards based curriculum and a "fair and appropriate free public education." The purpose for reviewing lesson plans is to ensure that teachers are indeed planning lessons (research shows that teachers who are better planners are more successful in meeting curricular objectives, Wong, 2005).

All teachers at AMIKIDS are required to write lesson plans and submit them digitally for review by administration. Administration reviews lesson plans weekly and provides guidance and support to encourage the use of the most powerful instructional practices with our students. The value in posting lesson plans electronically is that teachers have the opportunity to review each other's plans for recommendations, support and inspiration. Teachers will have common planning time to share ideas within and across disciplines.

### **Instructional Monitoring**

**STAR Assessments (Reading, Mathematics).** Frequent assessments are a product of the Whole School Effectiveness Continuous Improvement Model based achievements of G. Anderson in Houston, TX and adopted by school districts across the country. The goal is to allow assessment of student progress to drive instructional needs. Every summer, the entire school staff disaggregates the previous school year's assessment data. This sets goals and priorities for what

needs to be taught during the next school year. Teachers walk away with priorities for their instructional calendar.

Each month, every student level is given a short “progress monitoring” assessment to determine if they are meeting expectations in reading and mathematics. These assessments are normative-referenced tests that are given to students throughout the year across the country. The results are used to address which students may need more services through plans which are developed to meet the needs of the student. Teachers are held accountable and meet with the Director of Education or Lead Teacher every week to update student progress on the interventions recommended in the plans.

**Academic Review.** At the end of the nine-week grading period, the teacher sits with the administration and reviews each child’s progress. The discussion includes: a summary of their grades in each academic area, the student’s progress toward meeting benchmarks, their progress toward their goals written in the Individual Academic Plan (IAP), the number of parent conferences held and the teachers overall assessment of that students’ progress during that nine week period. If there are patterns present within individual students or class wide, the data are discussed and new goals are set for the next nine-week period.

Assessment of the academic needs of students is complete by utilizing the Renaissance Learning STAR Enterprise Reading and Math assessment within the first 10 days of enrollment. STAR Enterprise is a research-based assessment that provides real-time data instantly to make informed decisions about the curriculum and instructional needs of each individual student. This instrument, aligned to the Common Core State Standards, provides reports detailing if a student is on track to reach proficiency, identifying skills mastered, and identifying the skills that students are ready to learn next. STAR Enterprise Reading and Math assessment has proven to be a tool that helps to bridge assessment and instruction for our at-risk student population.

In concert with the academic reviews, the teacher must justify the grades being given to each student in each area. They must demonstrate the grade that they choose to give by using the data gathered throughout the nine week period. This discussion provides insight regarding academic priorities and ensuring skill mastery. Teachers may also discuss behavioral concerns that they are having with students. Plans are developed with the administration to remediate concerns.

### **Technology**

The AMKids Georgetown Marine Institute will implement the use of technology in several ways. Our students cannot compete globally with an increasingly digital world if they do not have daily exposure to the necessary tools. Therefore, we are committed to providing a technology solution to each student during their enrollment time at the school.



From the most simplistic of solutions such as the AMIkids, Inc. ENGRADE software for online grading and attendance that to the Plato Courseware and Renaissance Learning for students, teachers have the opportunity to see specifically where the students have mastered material and where they are in need of remediation. Through the analysis of reporting documents generated, teachers have a better understanding of individual student achievement and make informed instructional decisions.

### **Pre-vocational and Vocational**

AMIkids Georgetown Marine Institute provides youth with career and technical education services both during the academic instructional day through an employability skills course instructed by the certified teachers and during non-academic time. All youth at the program are provided the opportunity to work on their life and employability skills through the **Work Keys Credential Program, and Casey Life Skills** as well as utilizing other available online resources such as [gcflearnfree.org](http://gcflearnfree.org), online vocational and education courses, etc.

**Casey Life Skills** provides an assessment to determine where students need greater support in competency development while working to maintain those competencies that are already well established. After initial assessment, youth are engaged in a curriculum that utilizes direct instruction and workbooks that contain information and exercises by topic area to help develop or strengthen the skills of the learner. Casey Life Skills contains the following modules:

Module 1: Money, Home and Food Management;

Module 2: Personal Care, Health, Social Skills, and Safety;

Module 3: Education, Job Seeking Skills, and Job Maintenance Skills;

Module 4: Housing, Transportation, Community Resources, Understanding Law, Recreation;

Module 5: Young Parents Guide.

Goodwill Community Foundation, [gcflearnfree.org](http://gcflearnfree.org) provides youth the opportunity to work on skills that range from grill safety, riding a bus, using a vending machine to working with Apple products, Microsoft Office, Social Media, etc. This is an amazing free resource that can help youth with their everyday living skills, as well as more complex, industry recognized computer skills. The courses are self-study and self-paced as well as entertaining and informative.

### **Vocational and Technical**

We, at AMIkids, understand that not all youth have the same career interests or aspirations and are not all returning to the same communities with the same employment needs. Due to this, youth have many opportunities to participate in vocational programming through AMIkids, **ServSafe, Microsoft Office, District Public Schools, and local community agencies**. AMIkids Georgetown Marine Institute also provides youth with access to **Workforce Development (WIA, OneStop Career Centers, etc.)** programs wherein youth learn employability skills such as interviewing, resume writing, and job searching to equip them to become ready for the workforce. AMIkids Georgetown Marine Institute has already established relationships with WIA agencies in the area and will maintain and grow these relationships.



### **ServSafe® Staff Certifications**

Culinary skills training is delivered using the **ServSafe®** course to youth enrolled. **ServSafe®** teaches basic food safety practices, and food handling through five (5) sessions of 60 to 90 minutes each (Basic Food Safety, Personal Hygiene, Cross-contamination and Allergens, Time and Temperature, and Cleaning and Sanitation). Youth who complete the online course and companion assessment may be eligible for Food Handler Certification. The ProStart Food Handler Program is an online curriculum that covers food-borne illnesses, food allergies and the potential for contamination that make food safety critical for food service businesses. The **ServSafe® Manager Certification is accredited by the American National Standards Institute (ANSI)-Conference for Food Protection (CFP)** and blends the latest FDA Food Code, food safety research and years of food sanitation experience.

AMKids Residential programs in FL, SC, NM, TX and VA provide ServSafe or The Florida Safe Staff training to their youth and have successfully trained over 300 youth in these curricula. AMKids has seen that classroom study works the best, preferably in the dining area and is enhanced through the use of the video series and hands on learning experiences.

### **Work Keys**

AMKids Georgetown Marine Institute will offer youth the opportunity to work on self-paced online learning programs such as the Work Keys program, Goodwill Community Foundation's [gcflearnfree.org](http://gcflearnfree.org) programs that train on such topics as Microsoft Office, Apple, Google, Social Media, Career, Job Development, Internet Basics, Everyday Life, Reading, Math, etc. Our goal is to provide the youth with as many opportunities as possible to assure they are prepared for transition into a successful adulthood.

### **Mentoring/Tutoring**

AMKids Georgetown Marine Institute believes in extending the youth's education beyond the classroom and regular school day by offering mentoring, religious activities, service learning, and other structured activities throughout the youth's stay at the program. In treating the entire youth based on his needs, AMKids Georgetown Marine Institute will work to match each youth with a mentor either through **faith based mentoring**, or through other local **community** contacts. Through AMKids Georgetown Marine Institute community building efforts and mentoring, not only will the youth benefit from the mentoring, so will the community.

As a national nonprofit we are able to achieve high outcomes across our programs because the philosophical outlook, core training programs, and activities at each site are consistently aligned with the APGM®.



## AMKids Georgetown Supplemental Proposal

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It should be noted that the SCDJJ RFP 5400007516 and State Standards for Residential Care calls for vocational services to include development of life skills, basic academic skills, GED preparation, and/or vocational skills and may include provision or access to:

- Counseling and guidance
- Job search and placement
- Vocational and other training services
- On-the-job or personal assistance services to teach good work habits
- Supportive employment services
- Technical assistance for self-employment
- Transportation, if needed

In the proposal, AMKids Georgetown has responded to meet the requirements of the RFP and State Standards, however, since opening in 1989 and especially over the past contract period, AMKids Georgetown has enhanced its programming to include **additional vocational opportunities and a vocational instructor**. These additional vocational opportunities have, not only yielded positive results for the youth, but have affected the State's reduction in recidivism, the youth being able to sustain a higher quality of life and productivity in the communities in which they return and have allowed program youth to give back to area.

AMKids Georgetown has also been working to improve and enhance the educational environment and educational gains for the youth by providing multiple learning strategies and systems. In order to continue to do so, AMKids Georgetown is in need of adding a **full time** Director of Education to work with teachers and youth to provide the best educational and vocational programming possible.

For SCDJJ RFP 5400007516, AMKids Georgetown will be more than happy to continue to provide and/or add these additional components to be funded at an additional rate of \$70,018 annually.

AC#5547875

STATE OF FLORIDA  
DEPARTMENT OF HEALTH  
DIVISION OF MEDICAL QUALITY ASSURANCE

DATE	LICENSE NO.	CONTROL NO.
06/06/2013	ND 907	26573

The **DIETITIAN/NUTRITIONIST**  
named below has met all requirements of  
the laws and rules of the state of Florida.

Expiration Date: **MAY 31, 2015**

**MARITZA BERTOT-CASH**  
**PASCO COUNTY HEALTH DEPARTMENT**  
**4135 LAND O LAKES BLVD**  
**LAND O LAKES, FL 34639**



Rick Scott  
GOVERNOR

John H. Armstrong, MD, FACS  
STATE SURGEON GENERAL

DISPLAY IF REQUIRED BY LAW

**Mission:**

To protect, promote & improve the health of all people in Florida through integrated state, county & community efforts.



**Rick Scott**  
Governor

**John H. Armstrong, MD, FACS**  
State Surgeon General & Secretary

**Vision:** To be the Healthiest State in the Nation

Dear Mr. Mason,

Please find attached the menu, templates, nutrient analysis summaries, and invoice for AMI Florida and South Carolina for the 2013-14 School Year.

I believe we've spoken with each other over the phone about any changes that were necessary to make. The only others were that in a few of the breakfast meals, items such as cheese( and on only one specific day, ham) were omitted to reduce sodium, saturated fat, and calories, as all of these things now have maximums defined by the NSLP. There were also some breakfast meals that had both a fruit and a serving of fruit juice. In these instances, the juice was removed to reduce total meal calories.

Regarding sodium, the amounts at breakfast have been further reduced from last year without actually removing too many items (again, mostly cheese). Though they have improved, the 2014-15 school year has restrictions set at roughly 100mg less than where our averages were this year.

Finally, as per your request, all servings of any meat, grain, vegetable, or milk are set to the amount necessary to fulfill the requirements that are cited upon the menu template sheets. For example, the serving of ham at breakfast now reads "1.22oz" and is credited as 1oz. Therefore, it is assumed that each kitchen using the menu will insure that the final weights of the products are consistent with these amounts cited.

All other issues cited previously have been addressed. For example, sweet rolls were cited as iced and credited as such, and bananas are now credited as  $\frac{3}{4}$  cup and paired with  $\frac{1}{2}$  cup applesauce to equal the 1 cup minimum for fruit servings. Again, the other issues lie with which entrees are being purchased from where and whether or not they have a CN label. In that event, it may be asked of each kitchen to provide those items.

Thank you again for all your help in getting this menu certified and please let me know if there is anything else I can do for you.

Sincerely,

Signature Redacted

Nathan Fryburger RD, LD/N  
Senior Public Health Nutritionist  
Nutrition Services Department

# FOOD BASED MEAL PATTERN- BREAKFAST 1 .PLATE – 7 DAY – SY 2013-2014 REQUIREMENTS

Agreement # \_\_\_\_\_ Contact Name AMI Kids Florida & South Carolina

Grade Grouping 9-12 Week1

**SBP Breakfast:** 8 fl. oz. Fluid Milk; ½ c. Fruits/100% Juice, (Vegetables may substitute for Fruits/Juice); 12.5-14 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); may substitute Meat/Meat Alternate for grains after the minimum daily grains requirement is met. Daily amount based on the weekly average; 450-600 calories; <10% of total calories from saturated fat; 0 grams trans-fat per day.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required daily from: Fat free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1% or fat free	Fat free	Fat free	Fat Free White		
		Portion in fl. oz.	8 fl oz.	8 fl. oz.	8 fl. oz.	8 fl. oz.		
Components Week 1	Menu Item & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Same	Same	Same	Same	Same	Same	Same
Fruits/100% Juice ( ½ C/day minimum)  OR Vegetables ( ½ C/day minimum if a planned fruit substitution)	Item	Peach	Honeydew Melon	Watermelon	100% Orange Juice	Apple	100% Orange Juice	Strawberries
	Portion in cups	1Cup	1Cup	1Cup	8oz=1 cup	1Cup	1Cup	1Cup
	Item							
	Portion in cups							
Grains/Whole Grains (1 oz. eq. minimum daily) ≥50% WGR 12.5-14 oz. eq./wk	Item	WG Bread Toasted	Biscuit	English Muffin	Grits WG Bread Toasted	WG Bagel	WG Pancakes	Enriched Dry Cereal Cinnamon Roll Frosted
	Portion in oz. (Cooked cereal in cup measures)	1oz = 1oz G/B	2oz = 2oz G/B	2oz = 2oz. G/B	1 Cup= 2oz. G/B 1oz = 1oz G/B	2oz = 2oz G/B	3oz = 2.5oz G/B	1 Cup = 1oz G/B 2oz= ¾ G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)  OR Meat/Meat Alternate (If planned)	Item	Hardboiled Eggs Cheese LS	Scrambled Egg	Hardboiled Egg Sausage Patty	Scrambled Eggs	Ham Cheese	Sausage Patty LS	Yogurt
	Portion size or oz.	2 each= 2oz 1oz= ½oz	2oz	2each= 2oz 1oz	2oz	1.22oz= 1oz 1oz= ½oz	1oz	½ cup= 1oz
	Contribution in oz.*	2.5 M/MA	2oz =2M/MA	3oz M/MA	2M/MA	1.5 M/MA	1 M/MA	1 M/MA
Other Foods/Condiments (If planned)	Item	Trans fat free Margarine	Trans fat free Margarine	Jelly	Trans fat free Margarine	Trans fat free Margarine	Syrup	
	Portion size or oz.	1T	1T	1T	1t	1t	3t	

# FOOD BASED MEAL PATTERN- BREAKFAST 1 PLATE – 7 DAY – SY 2013-2014 REQUIREMENTS

Agreement # \_\_\_\_\_ Contact Name AMI Kids Florida & South Carolina

Grade Grouping 9-12 Week2

SBP Breakfast: 8 fl. oz. Fluid Milk; ½ c. Fruits/100% Juice, (Vegetables may substitute for Fruits/Juice); 12.5-14 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); may substitute Meat/Meat Alternate for grains after the minimum daily grains requirement is met. Daily amount based on the weekly average; 450-600 calories; <10% of total calories from saturated fat; 0 grams trans fat per day.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required daily from: Fat free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1% or fat free	Fat free	Fat free	Fat Free White		
		Portion in fl. oz.	8 oz.	8fl. oz.	8 fl. oz.	8 fl. oz.		
Components Week 2	Menu Item & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Same	Same	Same	Same	Same	Same	Same
Fruits/100% Juice ( ½ C/day minimum)  OR  Vegetables ( ½ C/day minimum if a planned fruit substitution)	Item	Banana, medium Applesauce	100% Orange Juice	Fruit Salad	100% Orange Juice	Cantaloupe	100% Orange Juice	100% Orange Juice
	Portion in cups	¾ Cup ½ Cup	8oz.=1Cup	1Cup	8oz= 1Cup	1Cup	1Cup	6oz =¾ Cup
	Item							
	Portion in cups							
Grains/Whole Grains (1 oz. eq. minimum daily) ≥50% WGR 12.5-14 oz. eq./wk	Item	Enriched Dry Cereal WG Bread Toasted	Grits Biscuit	WG Tortilla .	English Muffin	WG Bread Toasted	Oatmeal Danish Roll, frosted	Multigrain Waffles
	Portion in oz. (Cooked cereal in cup measures)	2 Cup = 2oz G/B 1oz = 1oz G/B	½ Cup= 1G/B 2oz = 2oz G/B	1oz = 1oz G/B	2oz= 2oz G/B	2oz = 2oz G/B	1Cup = 2oz G/B 2 oz= ¾ G/B	3oz = 2.5oz G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)  OR  Meat/Meat Alternate (If planned)	Item	Hardboiled Eggs	Ham	Cheese Scrambled Eggs Egg	Hardboiled Eggs Sausage Patty	Western Omelet Cheese	Yogurt	Turkey Bacon
	Portion size or oz.	2 each= 2oz	1.22oz= 1oz	1oz= ½oz 2each= 2oz	2oz 1oz	2oz Scrambled Eggs 0.5oz Cheese= ¼ oz	½ Cup = 1oz	1.4oz= 1oz
	Contribution in oz.*	2 M/MA	1 M/MA	2.5oz M/MA	3M/MA	2.5 M/MA	1 M/MA	0M/MA
Other Foods/Condiments (If planned)	Item		Margarine	Salsa	Margarine	Margarine		Syrup
	Portion size or oz.		1t	1oz	1t	1t		1T

# FOOD BASED MEAL PATTERN- BREAKFAST PLATE – 7 DAY – SY 2013-2014 REQUIREMENTS

Agreement # \_\_\_\_\_ Contact Name AMI Kids Florida & South Carolina

Grade Grouping 9-12 Week 3

SBP Breakfast: 8 fl. oz. Fluid Milk; ½ c. Fruits/100% Juice, (Vegetables may substitute for Fruits/Juice); 12.5-14 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); may substitute Meat/Meat Alternate for grains after the minimum daily grains requirement is met. Daily amount based on the weekly average; 450-600 calories; <10% of total calories from saturated fat; 0 grams trans fat per day.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required daily from: Fat free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1% or fat free	Fat free	Fat free	Fat Free White		
		Portion in fl. oz.	8 oz.	8fl. oz.	8 fl. oz.	8 fl. oz.		
Components Week 3	Menu Item & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Same	Same	Same	Same	Same	Same	Same
Fruits/100% Juice (½ C/day minimum)	Item	100% Orange Juice	100% Orange Juice	Peaches	Strawberries	Banana, medium Applesauce	100% Orange Juice	100% Orange Juice
	Portion in cups	8oz=1 Cup	8oz=1 Cup	1Cup	1Cup	¾ Cup ½ Cup	8oz=1Cup	8oz=1 Cup
OR Vegetables (½ C/day minimum if a planned fruit substitution)	Item				Hash Browns			
	Portion in cups				½ Cup			
Grains/Whole Grains (1 oz. eq. minimum daily) ≥50% WGR 12.5-14 oz. eq./wk	Item	Grits	WG Bread	Enriched Dried Cereal	Flour Tortilla	Oatmeal WG Bread	Multigrain Pancakes	Biscuit
	Portion in oz. (Cooked cereal in cup measures)	1 Cup= 1oz G/B	1oz= 1oz G/B	1 Cup= 1oz G/B	1oz= 1oz G/B	1 Cup= 2oz G/B 2oz= 2oz G/B	4oz= 3ozG/B	2oz= 2oz G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)	Item	Chees LS Sausage Patty	Ham Egg	Blueberry Muffin Yogurt	Egg	Peanut Butter	Cheese LF	Eggs
	Portion size or oz.	1oz= ½ oz 1 oz	1.22oz= 1oz 2oz	2oz 8oz	2oz	1 T	1oz= ½ oz	4oz
OR Meat/Meat Alternate (If planned)	Contribution in oz.*	1.5 M/MA	3 M/MA	1oz G/B, 2M/MA	2 M/MA	0.5 M/MA	0.5 M/MA	4 M/MA
	Item		Margarine		Salsa		Syrup	Margarine
Other Foods/Condiments (If planned)	Portion size or oz.		1t		1T		1T	1t



# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 40

Avg. Daily Kcals: 566.137  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 breakfast 1

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%	Vitamins	Value	Unit	Goal	%
Kilocalories	566.137	kcal	2000.000	28 %	Vitamin A (RE)	306.287	RE		*
Protein	25.325	g	50.000	51 %	Beta-Carotene	186.482	µg		*
Carbohydrate	77.090	g	300.000	26 %	Vitamin C	76.284	mg	60.000	127 %
Fat, Total	18.096	g	65.000	28 %	Vitamin D (ug)	4.125	µg	10.000	41 %
Alcohol	0.000	g		*	Vitamin E (mg)	0.161	mg	20.000	1 %
Cholesterol	197.171	mg	300.000	66 %	Alpha-Tocopherol	2.286	mg		*
Saturated Fat	6.240	g	20.000	31 %	Thiamin	0.730	mg	1.500	49 %
Monounsaturated Fat	5.809	g		*	Riboflavin	1.226	mg	1.700	72 %
Polyunsaturated Fat	4.250	g		*	Niacin	6.548	mg	20.000	33 %
MFA 18:1, Oleic	5.433	g		*	Pyridoxine (Vitamin B6)	0.630	mg	2.000	31 %
PFA 18:2, Linoleic	3.273	g		*	Folate (Total)	195.846	µg	400.000	49 %
PFA 18:3, Linolenic	0.260	g		*	Cobalamin (Vitamin B12)	2.740	µg	6.000	46 %
PFA 20:5, EPA	0.002	g		*	Biotin	15.758	µg	300.000	5 %
PFA 22:6, DHA	0.017	g		*	Pantothenic Acid	3.501	mg	10.000	35 %
Dietary Fiber, Total	4.074	g	25.000	16 %	Vitamin K	7.169	µg	80.000	9 %
Sugar, Total	39.665	g		*					

Amino Acids	Value	Unit	Goal	%	Minerals	Value	Unit	Goal	%
Tryptophan	247.398	mg		*	Sodium	598.216	mg	2400.000	25 %
Threonine	808.956	mg		*	Potassium	1021.221	mg	3500.000	29 %
Isoleucine	997.926	mg		*	Calcium	490.888	mg	1000.000	49 %
Leucine	1785.496	mg		*	Iron	5.826	mg	18.000	32 %
Lysine	1369.699	mg		*	Phosphorus	549.082	mg	1000.000	55 %
Methionine	510.536	mg		*	Magnesium	80.927	mg	400.000	20 %
Cystine	326.922	mg		*	Zinc	4.996	mg	15.000	33 %
Phenylalanine	1035.528	mg		*	Copper	0.239	mg	2.000	12 %
Tyrosine	852.029	mg		*	Manganese	0.675	mg	2.000	34 %
Valine	1210.299	mg		*	Selenium	40.227	µg	70.000	57 %
Histidine	526.361	mg		*	Chromium	0.017	mg	0.120	14 %
					Molybdenum	18.803	µg	75.000	25 %

(\* No Goal Value)

## Exchanges

Bread/Starch	2.00
Fat	0.50
Fruit	1.00
Meat-High Fat	0.50
Meat-Lean	0.00
Meat-Medium Fat	1.00
Milk-Skim	1.00
Other Carbohydrate	0.50

## Percentage Of Kcals



Protein 17.7%  
Carbohydrate 53.9%  
Total Fat 28.4%  
Alcohol 0.0%



# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 42

Avg. Daily Kcals: 566.133  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 2 breakfast

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%
Kilocalories	566.133	kcal	2000.000	28 %
Protein	24.027	g	50.000	48 %
Carbohydrate	84.015	g	300.000	28 %
Fat, Total	16.272	g	65.000	25 %
Alcohol	0.000	g		*
Cholesterol	148.645	mg	300.000	50 %
Saturated Fat	5.763	g	20.000	29 %
Monounsaturated Fat	5.602	g		*
Polyunsaturated Fat	2.934	g		*
MFA 18:1, Oleic	5.015	g		*
PFA 18:2, Linoleic	2.202	g		*
PFA 18:3, Linolenic	0.213	g		*
PFA 20:5, EPA	0.001	g		*
PFA 22:6, DHA	0.011	g		*
Dietary Fiber, Total	5.315	g	25.000	21 %
Sugar, Total	46.352	g		*

Vitamins	Value	Unit	Goal	%
Vitamin A (RE)	387.991	RE		*
Beta-Carotene	599.575	µg		*
Vitamin C	89.622	mg	60.000	149 %
Vitamin D (µg)	3.736	µg	10.000	37 %
Vitamin E (mg)	3.032	mg	20.000	15 %
Alpha-Tocopherol	2.950	mg		*
Thiamin	0.755	mg	1.500	50 %
Riboflavin	1.186	mg	1.700	70 %
Niacin	6.759	mg	20.000	34 %
Pyridoxine (Vitamin B6)	0.753	mg	2.000	38 %
Folate (Total)	180.516	µg	400.000	45 %
Cobalamin (Vitamin B12)	2.728	µg	6.000	45 %
Biotin	13.123	µg	300.000	4 %
Pantothenic Acid	3.208	mg	10.000	32 %
Vitamin K	7.519	µg	80.000	9 %

Amino Acids	Value	Unit	Goal	%
Tryptophan	207.278	mg		*
Threonine	682.155	mg		*
Isoleucine	826.958	mg		*
Leucine	1486.165	mg		*
Lysine	1195.133	mg		*
Methionine	423.600	mg		*
Cystine	228.220	mg		*
Phenylalanine	864.643	mg		*
Tyrosine	734.007	mg		*
Valine	1043.520	mg		*
Histidine	464.451	mg		*

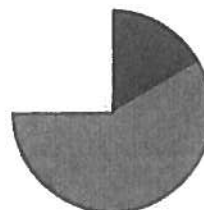
Minerals	Value	Unit	Goal	%
Sodium	597.101	mg	2400.000	25 %
Potassium	1142.367	mg	3500.000	33 %
Calcium	474.579	mg	1000.000	47 %
Iron	5.902	mg	18.000	33 %
Phosphorus	529.513	mg	1000.000	53 %
Magnesium	101.839	mg	400.000	25 %
Zinc	4.878	mg	15.000	33 %
Copper	0.275	mg	2.000	14 %
Manganese	0.826	mg	2.000	41 %
Selenium	33.048	µg	70.000	47 %
Chromium	0.013	mg	0.120	11 %
Molybdenum	17.880	µg	75.000	24 %

(\* No Goal Value)

## Exchanges

Bread/Starch	2.00
Fat	0.50
Fruit	2.00
Meat-High Fat	0.00
Meat-Lean	0.00
Meat-Medium Fat	1.00
Milk-Skim	1.00
Other Carbohydrate	0.50
Vegetable	0.00

## Percentage Of Kcals





# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 38

Avg. Daily Kcals: 601.932  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 3 breakfast

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%
Kilocalories	601.932	kcal	2000.000	30 %
Protein	26.647	g	50.000	53 %
Carbohydrate	82.778	g	300.000	28 %
Fat, Total	19.132	g	65.000	29 %
Alcohol	0.000	g		*
Cholesterol	201.577	mg	300.000	67 %
Saturated Fat	6.210	g	20.000	31 %
Monounsaturated Fat	6.666	g		*
Polyunsaturated Fat	4.352	g		*
MFA 18:1, Oleic	5.924	g		*
PFA 18:2, Linoleic	3.449	g		*
PFA 18:3, Linolenic	0.229	g		*
PFA 20:5, EPA	0.002	g		*
PFA 22:6, DHA	0.017	g		*
Dietary Fiber, Total	4.904	g	25.000	20 %
Sugar, Total	44.440	g		*

Vitamins	Value	Unit	Goal	%
Vitamin A (RE)	287.956	RE		*
Beta-Carotene	126.598	µg		*
Vitamin C	90.705	mg	60.000	151 %
Vitamin D (µg)	4.204	µg	10.000	42 %
Vitamin E (mg)	0.374	mg	20.000	2 %
Alpha-Tocopherol	2.320	mg		*
Thiamin	0.703	mg	1.500	47 %
Riboflavin	1.242	mg	1.700	73 %
Niacin	6.764	mg	20.000	34 %
Pyridoxine (Vitamin B6)	0.722	mg	2.000	36 %
Folate (Total)	187.161	µg	400.000	47 %
Cobalamin (Vitamin B12)	2.876	µg	6.000	48 %
Biotin	16.556	µg	300.000	6 %
Pantothenic Acid	3.668	mg	10.000	37 %
Vitamin K	5.248	µg	80.000	7 %

Amino Acids	Value	Unit	Goal	%
Tryptophan	264.725	mg		*
Threonine	915.333	mg		*
Isoleucine	1096.747	mg		*
Leucine	1952.524	mg		*
Lysine	1559.153	mg		*
Methionine	563.997	mg		*
Cystine	313.196	mg		*
Phenylalanine	1138.444	mg		*
Tyrosine	961.012	mg		*
Valine	1348.825	mg		*
Histidine	604.390	mg		*

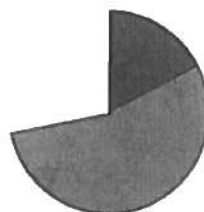
Minerals	Value	Unit	Goal	%
Sodium	626.969	mg	2400.000	26 %
Potassium	1156.572	mg	3500.000	33 %
Calcium	509.350	mg	1000.000	51 %
Iron	5.864	mg	18.000	33 %
Phosphorus	599.838	mg	1000.000	60 %
Magnesium	97.997	mg	400.000	24 %
Zinc	5.408	mg	15.000	36 %
Copper	0.289	mg	2.000	14 %
Manganese	0.839	mg	2.000	42 %
Selenium	38.080	µg	70.000	54 %
Chromium	0.012	mg	0.120	10 %
Molybdenum	16.714	µg	75.000	22 %

(\* No Goal Value)

## Exchanges

Bread/Starch	2.50
Fat	0.50
Fruit	1.50
Meat-High Fat	0.00
Meat-Lean	0.00
Meat-Medium Fat	1.00
Milk-Skim	1.00
Other Carbohydrate	0.50

## Percentage Of Kcals



Protein 17.5%  
Carbohydrate 54.3%  
Total Fat 28.2%  
Alcohol 0.0%

# **NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY**

Agreement # \_\_\_\_\_ Contact Name \_\_\_\_\_ Week One \_\_\_\_\_ Grade Grouping 9-12  
 FBMP - Lunch: 8 fl. oz. Fluid Milk; 7 cups Fruits/wk; 7 cups Vegetables/wk (from the subgroups); 14-17 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); 14-17 oz. Meat/Meat Alternate per week. Other specifications: Daily amount based on the weekly average: 750-850 calories; <10% of total calories from saturated fat; 0 grams trans fat per day.  
 Complete Milk Information Chart. Enter N/A for flavors not offered. If same choices offered every day, enter "SAME" for each menu. If choices change with menus, enter each choice offered.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required. Fat Free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1% or Skim	N/A	N/A	N/A		
		Portion in fl. oz.	8 oz					
Components Week 1	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored
Meat/Meat Alternates (2 oz/day minimum) 14-17oz. eq./wk	Item	Chicken Fajitas	Pork Chop	Chicken Parmesan	Beef Shepard's Pie	BBQ Chicken	Ground Beef Hoagie	Beef Stew
	Portion size or oz.	2oz Chicken	2 oz Pork Chop	2 oz Chicken	2 oz Beef	2 oz Chicken	2 oz Beef	2oz Beef
2 <sup>nd</sup> Meat/Meat Alternates (If planned)	Item			Mozzarella Cheese			Cheese LF	
	Portion size or oz.			1 oz=1/2 M/MA			1oz=1/2 M/MA	
	Contribution in oz.*	2 M/MA	2M/MA	2.5 M/MA	2M/MA	2M/MA	2.5 M/MA	2M/MA
Grains/Whole Grains <sup>1</sup> (2 oz eq. minimum daily) ≥50% WGR 14-17oz. eq./wk	Item	Flour Tortilla	Brown Rice	Enriched Spaghetti Noodles	Garlic Toast	WG Roll	WG Bun	Brown Rice
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups	2oz = 2 G/B	1Cup= 2 G/B.	1Cup=2 G/B	2oz = 2 G/B	2oz= 2 G/B	2oz=2 G/B	1Cup=2 G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)	Item							
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups							
Fruits (1 c/day minimum)	Item	Pineapple	Apple Sauce	Banana, medium	Strawberries	Pears	Grapes	Peach
	Portion in cups	1Cup	1Cup	3/4 Cup	1Cup	1Cup	1Cup	1Cup
2 <sup>nd</sup> Fruits (If planned)	Item		Mixed Melon	Apple Sauce				
	Portion in cups		1Cup	½ Cup				

# NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Components Week 1	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Vegetables: (Dark Green ½ /wk)	Item			Romaine Salad	Romaine Salad			Romaine Salad
	Portion in cups			1Cup=1/2Cup	1Cup=1/2Cup			1Cup=1/2Cup
Vegetables: (Red/Orange 1 ¼ c/wk)	Item		Sweet Potatoes	Tomato Sauce			Baby Carrots	
	Portion in cups		1Cup	4oz=1/2Cup			1Cup	
Vegetables: (Beans, Peas or Legumes ¾ c/wk)	Item	Pinto Beans						
	Portion size or oz.	1Cup						
Vegetables: (Starchy ½ c/wk)	Item				Mash potatoes	Potato Salad	Oven Baked Potato	
	Portion size or oz.				1/2 Cup	1/2 Cup= 3/8 Cup	1Cup	
Vegetables: (Other ¼ c/wk)	Item	Grilled Onions & Peppers	Green Beans					
	Portion size or oz.	½ Cup	1Cup					
Vegetables: (Additional 3 ½ c/wk)	Item					Green Beans	Onions & Peppers	Mixed Vegetables
	Portion in cups					1Cup	½Cup	½ Cup
Other Foods	Item							
	Portion in cups							
Condiments	Item	Salsa	Brown Gravy	Light Dressing	Light Dressing	Margarine		Light Dressing
	Portion size	1oz	1oz	1T	1T	1T		1T
	Item	Sour Cream FF	Margarine					
	Portion size	1T	1T					

## NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Note: \*Contribution in oz. is the cooked amount. i.e., ¼ cup cooked dry beans or 1.34 oz. raw ground beef yields 1 oz. cooked beef and each provides 1 oz. M/MA. Add additional menu item pages as needed.

<sup>1</sup> Please use specific product weights rather than general weights from the USDA Grains/Breads Instruction.

Note: FBMP = Food Based Meal Pattern, eq. = equivalent, c = cup, WGR = whole grain-rich.

Reminder: Sodium - Target I for SY 2014-2015 - Lunch ≤1230 mg (K-5); ≤1360 mg (6-8); ≤1420mg (9-12).

# NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Agreement # \_\_\_\_\_ Contact Name \_\_\_\_\_ Week Two \_\_\_\_\_ Grade Grouping 9-12  
 FBMP - Lunch: 8 fl. oz. Fluid Milk; 7 cups Fruits/wk; 7 cups Vegetables/wk (from the subgroups); 14-17 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); 14-17 oz. Meat/Meat Alternate per week. Other specifications: Daily amount based on the weekly average: 750-850 calories; <10% of total calories from saturated fat; 0 grams trans fat per day.  
 Complete Milk Information Chart. Enter N/A for flavors not offered. If same choices offered every day, enter "SAME" for each menu. If choices change with menus, enter each choice offered.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required. Fat Free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1%	N/A	N/A	N/A		
		Portion in fl. oz.	8 oz					
Components Week 2	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored
Meat/Meat Alternates (2 oz/day minimum) 14-17oz. eq./wk	Item	Taco Salad	Spaghetti w/Meat Balls	Baked Cajun Fish	Country Fried Steak	LS Baked Ham	Pork	Chicken
	Portion size or oz.	2.5 oz Ground Beef	2.5 oz Beef	2 oz Fish	2 oz Steak	2 oz Ham	2 oz Pork	2oz Chicken
2 <sup>nd</sup> Meat/Meat Alternates (If planned)	Item	Cheese						
	Portion size or oz.	0.5oz=1/4 M/MA						
	Contribution in oz.*	2.75 M/MA	2.5M/MA	2 M/MA	2M/MA	2M/MA	2 M/MA	2M/MA
Grains/Whole Grains <sup>1</sup> (2 oz eq. minimum daily) ≥50% WGR 14-17oz. eq./wk	Item	LS Tortilla Chips	WG Pasta	Brown Rice	WG Roll	Pasta	Brown Rice	WG Roll
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups	2oz = 2 G/B	1Cup= 2 G/B	1 Cup= 2 G/B	2oz= 2 G/B	1 Cup= 2 G/B	1 Cup= 2 G/B	2oz= 2 G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)	Item					Corn Bread		
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups					1.2oz=1 G/B		
Fruits (1 c/day minimum)	Item	Mixed Melon	Pineapple	Pears	Banana, medium	Grapes	Pineapple	Peaches
	Portion in cups	1Cup	1Cup	1Cup	¾ Cup	1Cup	1Cup	1Cup
2 <sup>nd</sup> Fruits (If planned)	Item		Applesauce		Applesauce			Applesauce
	Portion in cups		½ Cup		½ Cup			1 Cup

# NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Components Week 1	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Vegetables: (Dark Green ½ c/wk)	Item	Romaine Lettuce				Collards		
	Portion in cups	2 Cup= 1Cup				1 Cup= 1 Cup		
Vegetables: (Red/Orange 1 ¼ c/wk)	Item		Carrots and Tomato Sauce					Carrots, Glazed
	Portion in cups		1 Cup and ½ Cup					1 Cup
Vegetables: (Beans, Peas or Legumes ¾ c/wk)	Item	Refried Beans		Red Kidney Beans		Black Eyed Peas		
	Portion size or oz.	½ Cup		1 Cup		1Cup		
Vegetables: (Starchy ½ c/wk)	Item				Baked Potato			Mashed Potatoes
	Portion size or oz.				1 Cup			½ Cup
Vegetables: (Other ¾ c/wk)	Item			Coleslaw			Stir Fry Vegetables	
	Portion size or oz.			½ Cup = 3/8 <sup>th</sup> Cup			1 Cup	
Vegetables: (Additional 3 ½ c/wk)	Item		Green Beans		Mixed Vegetables			
	Portion in cups		1 Cup		1 Cup			
Other Foods	Item							
	Portion in cups							
Condiments	Item	Sour Cream FF			Sour Cream FF	Margarine	Egg Roll	
	Portion size	1T			1T	1t	1 item	
	Item	Salsa			Brown Gravy		Sweet Sour Sauce	Margarine
	Portion size	1 oz			1 oz		2 T	1T

Note: \*Contribution in oz. is the cooked amount. i.e., ¼ cup cooked dry beans or 1.34 oz. raw ground beef yields 1 oz. cooked beef and each provides 1 oz. M/MA. Add additional menu item pages as needed.

## **NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY**

<sup>1</sup> Please use specific product weights rather than general weights from the USDA Grains/Breads Instruction.

**Note:** FBMP = Food Based Meal Pattern, eq. = equivalent, c = cup, WGR = whole grain-rich.

**Reminder:** Sodium - Target I for SY 2014-2015 - Lunch  $\leq 1230$  mg (K-5);  $\leq 1360$  mg (6-8);  $\leq 1420$ mg (9-12).

# ATTACHMENT 7

# NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Agreement # \_\_\_\_\_ Contact Name \_\_\_\_\_ Week Three \_\_\_\_\_ Grade Grouping 9-12  
FBMP - Lunch: 8 fl. oz. Fluid Milk; 7 cups Fruits/wk; 7 cups Vegetables/wk (from the subgroups); 14-17 oz. eq. Grains/Breads per seven-day week (one half of offerings are whole grain-rich); 14-17 oz. Meat/Meat Alternate per week. Other specifications: Daily amount based on the weekly average: 750-850 calories; <10% of total calories from saturated fat; 0 grams trans fat per day.  
Complete Milk Information Chart. Enter N/A for flavors not offered. If same choices offered every day, enter "SAME" for each menu. If choices change with menus, enter each choice offered.

Milk Choices		Flavor	White	Chocolate	Strawberry	Other (specify)		
Two choices required. Fat Free flavored or unflavored; 1% or less unflavored		Fat Content(s)	1%	N/A	N/A	N/A		
		Portion in fl. oz.	8 oz					
Components Week 3	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Milk		Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored	Unflavored
Meat/Meat Alternates (2 oz/day minimum) 14-17oz. eq./wk	Item	Beef Tacos	Chicken Stir Fry	Meatloaf	Pork Chop	Roast Chicken	BBQ Pork	Beef Tips
	Portion size or oz.	2.5 oz Beef	2.5 oz Chicken	3 oz Meatloaf	2 oz Pork Chop	2 oz Chicken	2 oz Pork	2oz Beef
2 <sup>nd</sup> Meat/Meat Alternates (If planned)	Item	Cheese						
	Portion size or oz.	0.5oz=1/4 M/MA						
	Contribution in oz.*	2.75 M/MA	2.5M/MA	3 M/MA	2M/MA	2M/MA	2 M/MA	2M/MA
Grains/Whole Grains <sup>1</sup> (2 oz eq. minimum daily) ≥50% WGR 14-17oz. eq./wk	Item	Taco Shells	Brown Rice	Garlic Toast	Corn Bread	Brown Rice	WG Roll	WG Roll
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups	2oz = 2 G/B	1Cup= 2 G/B	2oz= 2 G/B	2.4oz= 2 G/B	1 Cup= 2 G/B	2oz= 2 G/B	2oz= 2 G/B
2 <sup>nd</sup> Grains/Whole Grains (If planned)	Item							
	Portion in oz. <sup>1</sup> Cooked pasta/rice in cups							
Fruits (1 c/day minimum)	Item	Pineapple	Peaches	Grapes	Applesauce	Mixed Melon	Watermelon	Banana, medium
	Portion in cups	1Cup	1Cup	1Cup	1Cup	1Cup	1Cup	¾ Cup
2 <sup>nd</sup> Fruits (If planned)	Item							Applesauce
	Portion in cups							½ Cup

# NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

Components Week 1	Menu Item Name & Info	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Vegetables: (Dark Green ½ c/wk)	Item	Romaine Lettuce				Collards		Romaine Lettuce
	Portion in cups	1/2 Cup= ½ Cup				1 Cup		1 Cup= ½ Cup
Vegetables: (Red/Orange 1 ½ c/wk)	Item	Tomato			Sweet Potato			Carrots
	Portion in cups	½ Cup			1 Cup			½ Cup
Vegetables: (Beans, Peas or Legumes ¾ c/wk)	Item	Refried Beans				Red Kidney Beans		Peas
	Portion size or oz.	½ Cup				1 Cup		½ Cup
Vegetables: (Starchy ½ c/wk)	Item			Mashed Potatoes			Baked Potato Corn	Mashed Potatoes
	Portion size or oz.			1 Cup			1 Cup 1 Cup	½ Cup
Vegetables: (Other ¾ c/wk)	Item		Stir Fry Vegetables	Mixed Vegetables	Green Beans		Coleslaw	
	Portion size or oz.		1 Cup	1 Cup	1 Cup		1 Cup= ¾ Cup	
Vegetables: (Additional 3 ½ c/wk)	Item							
	Portion in cups							
Other Foods	Item		Veg. Egg Roll	Tomato Gravy				
	Portion in cups		1 item (2.2oz)	1oz				
Condiments	Item				Margarine	Brown Gravy	Margarine	Brown Gravy Light Dressing
	Portion size				1t	1T	1T	1T 1T
	Item	Salsa					BBQ Sauce	Margarine
	Portion size	1/4 Cup					1T	2t

Note: \*Contribution in oz. is the cooked amount. i.e., ¼ cup cooked dry beans or 1.34 oz. raw ground beef yields 1 oz. cooked beef and each provides 1 oz. M/MA. Add additional menu item pages as needed.

## NSLP - FOOD BASED MEAL PATTERN - LUNCH MENU - 7 DAY

**! Please use specific product weights rather than general weights from the USDA Grains/Breads Instruction.**

**Note: FBMP = Food Based Meal Pattern, eq. = equivalent, c = cup, WGR = whole grain-rich.**

**Reminder: Sodium - Target I for SY 2014-2015 - Lunch  $\leq 1230$  mg (K-5);  $\leq 1360$  mg (6-8);  $\leq 1420$ mg (9-12).**



# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 61

Avg. Daily Kcals: 802.787  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 1 lunch

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%
Kilocalories	802.787	kcal	2000.000	40 %
Protein	38.208	g	50.000	76 %
Carbohydrate	119.049	g	300.000	40 %
Fat, Total	21.450	g	65.000	33 %
Alcohol	0.000	g		*
Cholesterol	63.898	mg	300.000	21 %
Saturated Fat	6.889	g	20.000	34 %
Monounsaturated Fat	7.572	g		*
Polyunsaturated Fat	4.722	g		*
MFA 18:1, Oleic	7.033	g		*
PFA 18:2, Linoleic	4.172	g		*
PFA 18:3, Linolenic	0.476	g		*
PFA 20:5, EPA	0.002	g		*
PFA 22:6, DHA	0.006	g		*
Dietary Fiber, Total	14.790	g	25.000	59 %
Sugar, Total	42.247	g		*

Vitamins	Value	Unit	Goal	%
Vitamin A (RE)	917.979	RE		*
Beta-Carotene	3332.110	µg		*
Vitamin C	70.436	mg	60.000	117 %
Vitamin D (ug)	3.056	µg	10.000	31 %
Vitamin E (mg)	0.210	mg	20.000	1 %
Alpha-Tocopherol	2.785	mg		*
Thiamin	0.707	mg	1.500	47 %
Riboflavin	0.994	mg	1.700	58 %
Niacin	10.140	mg	20.000	51 %
Pyridoxine (Vitamin B6)	1.087	mg	2.000	54 %
Folate (Total)	206.132	µg	400.000	52 %
Cobalamin (Vitamin B12)	1.915	µg	6.000	32 %
Biotin	9.193	µg	300.000	3 %
Pantothenic Acid	2.491	mg	10.000	25 %
Vitamin K	52.495	µg	80.000	66 %

Amino Acids	Value	Unit	Goal	%
Tryptophan	391.834	mg		*
Threonine	1324.641	mg		*
Isoleucine	1538.346	mg		*
Leucine	2632.625	mg		*
Lysine	2377.639	mg		*
Methionine	744.781	mg		*
Cystine	375.029	mg		*
Phenylalanine	1551.774	mg		*
Tyrosine	1191.258	mg		*
Valine	1802.395	mg		*
Histidine	971.062	mg		*

Minerals	Value	Unit	Goal	%
Sodium	682.275	mg	2400.000	28 %
Potassium	1672.613	mg	3500.000	48 %
Calcium	522.124	mg	1000.000	52 %
Iron	5.449	mg	18.000	30 %
Phosphorus	711.675	mg	1000.000	71 %
Magnesium	170.464	mg	400.000	43 %
Zinc	4.948	mg	15.000	33 %
Copper	0.585	mg	2.000	29 %
Manganese	2.098	mg	2.000	105 %
Selenium	52.327	µg	70.000	75 %
Chromium	0.030	mg	0.120	25 %
Molybdenum	38.528	µg	75.000	51 %

(\* No Goal Value)

## Exchanges

Bread/Starch	4.00
Fat	2.00
Fruit	2.00
Meat-Lean	1.00
Meat-Medium Fat	1.00
Meat-Very Lean	0.50
Milk-Skim	1.00
Other Carbohydrate	0.00
Vegetable	2.00

## Percentage Of Kcals



Protein 18.6%  
Carbohydrate 57.9%  
Total Fat 23.5%  
Alcohol 0.0%



# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 57

Avg. Daily Kcals: 797.799  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 2 lunch

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%
Kilocalories	797.799	kcal	2000.000	40 %
Protein	36.919	g	50.000	74 %
Carbohydrate	121.189	g	300.000	40 %
Fat, Total	20.399	g	65.000	31 %
Alcohol	0.000	g		*
Cholesterol	62.315	mg	300.000	21 %
Saturated Fat	6.143	g	20.000	31 %
Monounsaturated Fat	7.054	g		*
Polyunsaturated Fat	5.068	g		*
MFA 18:1, Oleic	6.500	g		*
PFA 18:2, Linoleic	4.529	g		*
PFA 18:3, Linolenic	0.470	g		*
PFA 20:5, EPA	0.012	g		*
PFA 22:6, DHA	0.017	g		*
Dietary Fiber, Total	17.611	g	25.000	70 %
Sugar, Total	43.858	g		*

Vitamins	Value	Unit	Goal	%
Vitamin A (RE)	1417.115	RE		*
Beta-Carotene	6350.285	µg		*
Vitamin C	50.316	mg	60.000	84 %
Vitamin D (ug)	2.802	µg	10.000	28 %
Vitamin E (mg)	0.148	mg	20.000	1 %
Alpha-Tocopherol	2.792	mg		*
Thiamin	0.661	mg	1.500	44 %
Riboflavin	0.933	mg	1.700	55 %
Niacin	8.683	mg	20.000	43 %
Pyridoxine (Vitamin B6)	0.974	mg	2.000	49 %
Folate (Total)	188.402	µg	400.000	47 %
Cobalamin (Vitamin B12)	1.958	µg	6.000	33 %
Biotin	8.457	µg	300.000	3 %
Pantothenic Acid	2.217	mg	10.000	22 %
Vitamin K	96.244	µg	80.000	120 %

Amino Acids	Value	Unit	Goal	%
Tryptophan	340.411	mg		*
Threonine	1272.734	mg		*
Isoleucine	1416.386	mg		*
Leucine	2481.359	mg		*
Lysine	2138.806	mg		*
Methionine	673.781	mg		*
Cystine	376.214	mg		*
Phenylalanine	1430.419	mg		*
Tyrosine	1081.574	mg		*
Valine	1667.446	mg		*
Histidine	894.413	mg		*

Minerals	Value	Unit	Goal	%
Sodium	692.630	mg	2400.000	29 %
Potassium	1699.665	mg	3500.000	49 %
Calcium	517.163	mg	1000.000	52 %
Iron	5.891	mg	18.000	33 %
Phosphorus	681.696	mg	1000.000	68 %
Magnesium	179.145	mg	400.000	45 %
Zinc	5.591	mg	15.000	37 %
Copper	0.672	mg	2.000	34 %
Manganese	2.517	mg	2.000	126 %
Selenium	51.840	µg	70.000	74 %
Chromium	0.023	mg	0.120	19 %
Molybdenum	25.784	µg	75.000	34 %

(\* No Goal Value)

## Exchanges

Bread/Starch	4.50
Fat	1.00
Fruit	2.00
Meat-Lean	0.50
Meat-Medium Fat	1.00
Meat-Very Lean	0.50
Milk-Skim	1.00
Other Carbohydrate	0.00
Vegetable	1.50

## Percentage Of Kcals



Protein 18.1%  
Carbohydrate 59.4%  
Total Fat 22.5%  
Alcohol 0.0%



# Menu Template Nutrition Summary

Total Days: 7  
Total Foods: 57

Avg. Daily Kcals: 782.577  
Name: Florida/S Caroline (residential) AMI Kids 2013-14 3 lunch

Nutrient Goal Template: DAILY VALUES/RDI - ADULT/CHILD

Macronutrients	Value	Unit	Goal	%
Kilocalories	782.577	kcal	2000.000	39 %
Protein	38.491	g	50.000	77 %
Carbohydrate	116.960	g	300.000	39 %
Fat, Total	20.216	g	65.000	31 %
Alcohol	0.000	g		*
Cholesterol	65.569	mg	300.000	22 %
Saturated Fat	5.941	g	20.000	30 %
Monounsaturated Fat	7.505	g		*
Polyunsaturated Fat	4.628	g		*
MFA 18:1, Oleic	6.693	g		*
PFA 18:2, Linoleic	4.099	g		*
PFA 18:3, Linolenic	0.386	g		*
PFA 20:5, EPA	0.002	g		*
PFA 22:6, DHA	0.005	g		*
Dietary Fiber, Total	16.827	g	25.000	67 %
Sugar, Total	42.474	g		*

Vitamins	Value	Unit	Goal	%
Vitamin A (RE)	1265.415	RE		*
Beta-Carotene	6168.522	µg		*
Vitamin C	54.556	mg	60.000	91 %
Vitamin D (ug)	2.751	µg	10.000	28 %
Vitamin E (mg)	0.194	mg	20.000	1 %
Alpha-Tocopherol	2.277	mg		*
Thiamin	0.716	mg	1.500	48 %
Riboflavin	0.886	mg	1.700	52 %
Niacin	10.059	mg	20.000	50 %
Pyridoxine (Vitamin B6)	0.992	mg	2.000	50 %
Folate (Total)	187.253	µg	400.000	47 %
Cobalamin (Vitamin B12)	1.716	µg	6.000	29 %
Biotin	9.963	µg	300.000	3 %
Pantothenic Acid	2.698	mg	10.000	27 %
Vitamin K	184.651	µg	80.000	231 %

Amino Acids	Value	Unit	Goal	%
Tryptophan	388.248	mg		*
Threonine	1443.575	mg		*
Isoleucine	1626.111	mg		*
Leucine	2819.663	mg		*
Lysine	2535.270	mg		*
Methionine	795.885	mg		*
Cystine	388.509	mg		*
Phenylalanine	1600.068	mg		*
Tyrosine	1263.739	mg		*
Valine	1887.646	mg		*
Histidine	1040.015	mg		*

Minerals	Value	Unit	Goal	%
Sodium	564.090	mg	2400.000	24 %
Potassium	1636.235	mg	3500.000	47 %
Calcium	475.256	mg	1000.000	48 %
Iron	5.621	mg	18.000	31 %
Phosphorus	656.544	mg	1000.000	66 %
Magnesium	176.522	mg	400.000	44 %
Zinc	5.234	mg	15.000	35 %
Copper	0.617	mg	2.000	31 %
Manganese	2.049	mg	2.000	102 %
Selenium	42.625	µg	70.000	61 %
Chromium	0.021	mg	0.120	17 %
Molybdenum	22.858	µg	75.000	30 %

(\* No Goal Value)

## Exchanges

Bread/Starch	4.50
Fat	1.50
Fruit	1.50
Meat-Lean	0.00
Meat-Medium Fat	1.00
Meat-Very Lean	1.00
Milk-Skim	1.00
Other Carbohydrate	0.00
Vegetable	1.50

## Percentage Of Kcals



## DIET ORDER

ANNUAL Medical Statement for Students  
With Special Nutritional Needs

### Part I (Completed by Parent or Guardian)—Please PRINT

Name of Student (Last) \_\_\_\_\_ (First) \_\_\_\_\_ (MI) \_\_\_\_\_

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Age \_\_\_\_ Student ID # \_\_\_\_\_

School Attended by Student \_\_\_\_\_ Grade: \_\_\_\_\_ School Year: 20\_\_\_\_ to 20\_\_\_\_

Will student eat Breakfast at School? ☐ Yes, ☐ No / Lunch at School? ☐ Yes, ☐ No /  
After School Program? ☐ Yes, ☐ No

Name of Parent/Guardian \_\_\_\_\_ Signature \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Parent /Guardian's Phone Number(s): ( ) \_\_\_\_\_, ( ) \_\_\_\_\_, ( ) \_\_\_\_\_,  
Home Work Cell

### Part II (Completed by Licensed Medical Doctor (MD) treating student)—Please PRINT

Student's Diagnosis: \_\_\_\_\_

**RECEIVED**

*MD indicate which dietary modification the patient needs and specify what changes need to be made. Check ☒ all that Apply.*

☐ Texture Modification: ☐ Pureed ☐ Ground ☐ Chopped ☐ Other \_\_\_\_\_

☐ Nutrient Modification: (cholesterol, sodium, gluten, etc.): \_\_\_\_\_

☐ Lactose Intolerance: ☐ No milk to drink ☐ Avoid all dairy products ☐ Juice in place of milk

☐ Diabetic (Please indicate grams of CHO at breakfast and lunch)

☐ Food Allergies: ☐ ingestion ☐ contact ☐ inhalation

☐ List foods to be avoided: \_\_\_\_\_

MD Name: \_\_\_\_\_

MD Signature: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date: \_\_\_\_\_

Medical Office Stamp:

### Part III (Completed by School Food Service Personnel)

School Food Service Notes:



## B. Administrative and Financial Capability

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### 1. Financial Assurance

#### AMKids, Inc. Structure and Relationship to the Local Programs

The ultimate responsibility of the community-based national AMKids organization belongs to 600+ volunteer members of the Board of Trustees who provide oversight and guidance to the programs and fund- and friend-raise in the local communities. AMKids, Inc., a service provider to the individually incorporated programs, has an impressive history of providing **comprehensive** services and oversight to each local program that include, but are not limited to:

1. **Finance:** budgeting, accounting services, financial analysis, financial reporting, financial training, guarantee on bank loans, managing and coordinating outside audit services, pension plan management
2. **Administration:** committee meetings, annual board meetings, contract development, contract negotiations, group 501(c)(3) status, incorporation process, legal help, licensing, policy development, program marketing and development, legal compliance
3. **Operations:** training/development, compliance/evaluation, emergency staffing, state and federal liaison, experiential event services, operational statistics, operational guidelines, safety training/monitoring, student information system (SIS), NSLP reporting, implementation/oversight program services and the AMKids Personal Growth Model<sup>®</sup>
4. **Resource Development:** donations, fundraising, donation management, grant writing, fundraising training
5. **Communications:** marketing materials, media and public relations support, web development, social media, crisis communications, training
6. **Information Technology:** network installation, training, troubleshooting and support, network maintenance, purchasing, system analysis and design, Erate funding
7. **Support Services/Human Resources:** worker's compensation program, benefits management, compensation guidelines and policies, employee handbook, insurance administration, risk management, wage and hour compliance
8. **Internal Audit:** internal/special audits/investigations, collaborates with external auditors

AMKids, Inc. employs comprehensive fiscal management policies, procedures and manuals to assure the safeguarding of all funds, public or private. The AMKids' **Finance Manual** outlines the processes and controls necessary to ensure compliance with *Generally Accepted Accounting Principles* and to safeguard company assets and public funds. The *Manual* addresses procedures and controls related



to: Bank Accounts, Student Accounts, Accounts Receivable, Cash Receipt, Accounts Payable, Donations, Fixed Assets, Review of Financial Statements, Cash Forecasting, Equipment Contracts, and Record Retention. It is imperative that the Executive Director, Business Manager, Administrative Assistants, and anyone responsible for the financial management of the program thoroughly review and understand the controls. Some of the major controls outlined in the Manual include:

- Segregation of duties in cash the collection and payment processes
- Board approval of new bank accounts
- Executive Director approval of all payments to vendors and employees
- Board approval of non-routine purchases and lease agreements over \$2,500
- Payments from original invoices only and not from statements, copies, etc.
- Maximum credit limits on credit cards and house accounts
- Annual inventory of fixed assets
- Process for receiving and reporting noncash donations and ensuring compliance with tax requirements

In addition to the controls outlined in the Finance Manual, other fiscal controls include:

1. **Budgeting and Monitoring:** Each program prepares a budget annually, which includes operating revenue and expense, capital needs, and financing activities. The budgets are reviewed and approved by the Regional Manager and the local Board. In addition, each program receives monthly financial statements and a snapshot report that highlights key issues and explains budget variances. The *statements* are discussed at each local board meeting.
2. **Fundraising Best Practices and Controls:** policy outlines procedures related to collecting, counting, depositing, paying vendors, and IRS reporting. The Policy is available on the AMIkids Intranet (under Resource Development).
3. **Related Party Policy:** policy ensures that transactions between employees, entities controlled by employees, board members, and employees of vendors have proper documentation that they are at arms' length and are based on fair value. The Policy is available on the AMIkids Intranet (Accounting).
4. **Gift Acceptance Policy:** provides guidance for acceptance and subsequent disposition of donated cash, securities, land and real estate, boats and vehicles, and tangible personal property. The Policy is available on the AMIkids Intranet (under Resource Development).

#### **Internal and External Audits:**

AMIkids Internal Audit conducts audits of the program based on risk, but at least every 3 years. AMIkids Internal Audit operates independently of management and reports to the AMIkids Audit Committee and administratively to the AMIkids CEO. Reports are issued on the results of the internal audit, and management is required to submit corrective action plans within 10 days of



issuance of the report. The report and management's response are submitted to the program's Board of Trustees, Executive Management of AMKids, Inc., and to the AMKids Audit Committee quarterly as warranted.

Additionally, each program is audited, reviewed, or compiled by an independent accountant authorized by the AMKids Audit Committee, which is made up of independent financial professionals. This report is distributed to the local Board of Directors.



**AMlkids, Inc. and Affiliates**  
**Combined Financial Statements and Schedules**  
**Year ended June 30, 2013**  
**(With comparative information for 2012)**

# AMIkids, Inc. and Affiliates

## Index

Year ended June 30, 2013

(With comparative financial information for 2012)

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## Independent Auditors' Report

Board of Trustees  
AMIkids, Inc.

We have audited the accompanying financial statements of AMIkids, Inc. and Affiliates (the "Organization"), which comprise the statement of financial position as of June 30, 2013, and the related statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the financial statements.

### *Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### *Auditor's Responsibility*

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### *Opinion*

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of AMIkids, Inc. and Affiliates as of June 30, 2013, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### *Report on Summarized Comparative Information*

We have previously audited the AMIkids, Inc. and Affiliates 2012 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated September 18, 2012. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2012 is consistent, in all material respects, with the audited financial statements from which it has been derived.

*Cross, Fernandez & Riley, LLP*

Certified Public Accountants

Tampa, Florida  
September 17, 2013

**AMikids, Inc. and Affiliates**  
**Combined Statement of Financial Position**  
**June 30, 2013**  
**(With comparative financial information for 2012)**

	<u>2013</u>	<u>2012</u>
<b>Assets</b>		
Cash and Cash Equivalents	\$ 6,917,680	\$ 9,029,385
Investments	8,255,320	8,201,903
Accounts Receivable:		
Funding Agencies	4,321,290	4,903,497
Other, net of allowances of \$0 and \$349,250 as of June 30, 2013 and 2012, respectively	667,035	562,860
Prepaid Expenses and Other Assets	1,587,305	1,485,161
Assets Held for Sale	2,051,295	732,360
Boat Inventory	1,822,460	2,902,069
Boats under Lease	5,737,691	6,289,386
Property and Equipment, Net	11,530,303	15,885,230
	<u>\$ 42,890,379</u>	<u>\$ 49,991,851</u>
<b>Liabilities and Net Assets</b>		
<b>Liabilities:</b>		
Lines of Credit	\$ 1,103,000	\$ 940
Accounts Payable	1,479,858	969,376
Accrued Expenses	8,551,312	7,851,673
Accrued Pension	2,898,863	1,352,664
Deferred Revenues	654,091	736,179
Security Deposits	1,600,746	1,557,141
Notes Payable	2,448,489	3,731,828
Total Liabilities	<u>18,736,359</u>	<u>16,199,801</u>
<b>Net Assets:</b>		
Unrestricted	21,847,275	30,636,646
Temporarily Restricted	2,249,655	2,998,314
Permanently Restricted	57,090	157,090
Total Net Assets	<u>24,154,020</u>	<u>33,792,050</u>
	<u>\$ 42,890,379</u>	<u>\$ 49,991,851</u>

The accompanying notes are an integral part of these combined financial statements.

**AMikids, Inc. and Affiliates**  
**Combined Statement of Activities**  
**Year ended June 30, 2013**  
**(With summarized financial information for 2012)**

				<b>Totals</b>	
	<b>Unrestricted</b>	<b>Temporarily restricted</b>	<b>Permanently restricted</b>	<b>2013</b>	<b>2012</b>
Public support and revenue:					
State support:					
Florida	\$ 15,258,444	\$ -	\$ -	\$ 15,258,444	\$ 20,097,838
South Carolina	8,217,969	-	-	8,217,969	8,217,944
Louisiana	1,569,156	-	-	1,569,156	5,204,079
Georgia	1,298,359	-	-	1,298,359	5,717,303
Texas	535,166	-	-	535,166	597,613
North Carolina	1,469,399	-	-	1,469,399	1,316,050
Federal support	7,209,016	-	-	7,209,016	9,994,092
Regional funds	10,423,154	-	-	10,423,154	13,511,436
Contributions	1,239,792	2,643,123	-	3,882,915	2,007,206
Total public support	47,220,455	2,643,123	-	49,863,578	66,663,561
Revenue:					
Boat program	4,763,821	-	-	4,763,821	5,318,166
Investment income	290,678	1,550	-	292,228	136,254
Other	1,688,859	-	-	1,688,859	723,825
Total revenue	6,743,358	1,550	-	6,744,908	6,178,245
Net assets released from restrictions	3,393,332	(3,393,332)	-	-	-
Total public support and revenue	57,357,145	(748,659)	-	56,608,486	72,841,806
Expenses:					
Program services	51,656,294	-	-	51,656,294	61,389,242
Management and general	10,025,128	-	-	10,025,128	9,696,255
Fundraising	321,773	-	-	321,773	545,302
Boat program	4,243,321	-	-	4,243,321	5,000,633
Total expenses	66,246,516	-	-	66,246,516	76,631,432
Change in net assets	(8,889,371)	(748,659)	-	(9,638,030)	(3,789,626)
Net assets, beginning of year	30,636,646	2,998,314	157,090	33,792,050	37,581,676
Transfer of net assets	100,000	-	(100,000)	-	-
Net assets, end of year	\$ 21,847,275	\$ 2,249,655	\$ 57,090	\$ 24,154,020	\$ 33,792,050

The accompanying notes are an integral part of these combined financial statements.

**AMikids, Inc. and Affiliates**  
**Combined Statement of Functional Expenses**  
**Year ended June 30, 2013**  
**(With summarized financial information for 2012)**

	Total Program Services	Supporting Services			Total Support Services	Totals	
		Management and general	Fund Raising	Boat Program		2013	2012
Salaries	\$ 26,854,267	\$ 3,246,781	\$ 166,191	\$ 401,217	\$ 3,814,189	\$ 30,668,456	\$ 38,011,600
Employee benefits and payroll taxes <sup>1</sup>	8,367,316	1,821,372	30,385	128,895	1,980,652	10,347,968	11,444,413
Commissions	-	-	-	614,909	614,909	614,909	880,043
Travel	1,027,527	370,998	30,471	88,532	490,001	1,517,528	1,442,880
Conferences and training	958,502	64,732	2,147	688	67,567	1,026,069	1,135,213
Books and publications	24,413	33,995	15,868	2,023	51,886	76,299	78,386
Rent and utilities	2,433,799	143,604	-	12,350	155,954	2,589,753	3,009,560
Insurance <sup>2</sup>	3,178,806	(316,882)	-	203,916	(112,966)	3,065,840	1,814,696
Telephone	756,358	133,062	4,084	16,550	153,696	910,054	1,063,984
Professional fees	421,332	1,054,483	34,509	73,593	1,162,585	1,583,917	1,891,614
Postage	-	124,483	-	1,978	126,461	126,461	160,817
Student supplies and training	3,086,225	291,166	17,436	30,042	338,644	3,424,869	4,647,597
Community development	180,198	391,924	20,661	8,285	420,870	601,068	720,555
Equipment and maintenance	1,835,795	396,179	-	633,445	1,029,624	2,865,419	3,819,663
Transportation	-	22,816	-	58,593	81,409	81,409	147,476
Dockage	-	-	-	82,586	82,586	82,586	103,803
Interest	156,765	99,256	-	31,047	130,303	287,068	308,889
Depreciation and amortization	2,007,947	171,298	-	63,308	234,606	2,242,553	2,741,071
Amortization of boats on charter	-	-	-	1,777,805	1,777,805	1,777,805	2,089,332
Impairment and other expenses	367,044	1,975,861	21	13,559	1,989,441	2,356,485	1,119,840
<b>Total Expenses</b>	<b>\$ 51,656,294</b>	<b>\$ 10,025,128</b>	<b>\$ 321,773</b>	<b>\$ 4,243,321</b>	<b>\$ 14,590,222</b>	<b>\$ 66,246,516</b>	<b>\$ 76,631,432</b>

<sup>1</sup>Management and general includes \$625,000 of workers compensation expense due to actuarial increases in prior year claims

<sup>2</sup>Management and general includes \$365,000 of reduction in vehicle insurance expense due to actuarial reduction in prior year claims cost

The accompanying notes are an integral part of these combined financial statements.

**AMikids, Inc. and Affiliates**  
**Combined Statement of Cash Flows**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

	<u>2013</u>	<u>2012</u>
Cash flows from operating activities:		
Change in net assets	\$ (9,638,030)	\$ (3,789,626)
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities:		
Depreciation and amortization	2,242,553	2,741,071
Net (Gain) Loss on disposal/impairment of property and equipment	989,539	527,979
Donated property and equipment	(163,355)	(123,440)
Realized and unrealized gains on investments	(178,272)	(20,824)
Other loss	106,220	-
Uncollectible pledge expense	-	349,250
(Increase) decrease in:		
Accounts receivable	478,032	(186,370)
Prepaid expenses and other assets	(102,144)	(177,928)
Boat Inventory	1,079,609	138,000
Boats under Lease	551,695	831,709
Restricted investments	100,000	-
Increase (decrease) in:		
Accounts payable	510,482	(472,394)
Accrued expenses	699,639	86,133
Accrued pension	1,546,199	(28,270)
Deferred revenues	(608,364)	3,117
Security deposits	43,605	(138,029)
Net cash provided by (used in) operating activities	<u>(2,342,592)</u>	<u>(259,622)</u>
Cash flows from investing activities:		
Purchases of property and equipment	(749,883)	(1,344,142)
Proceeds from sale of property and equipment	1,373,304	26,592
Proceeds from sale of investments	6,819,550	9,274,083
Purchases of investments	(6,794,695)	(8,221,750)
Net cash provided by (used in) investing activities	<u>648,276</u>	<u>(265,217)</u>
Cash flows from financing activities:		
Net (repayments) borrowings on lines of credit	1,102,060	(533)
Proceeds from new borrowings from third parties	36,000	200,000
Payments on notes payable	(1,555,449)	(467,888)
Net cash used in financing activities	<u>(417,389)</u>	<u>(268,421)</u>
Net increase (decrease) in cash and cash equivalents	(2,111,705)	(793,260)
Cash and cash equivalents at beginning of year	9,029,385	9,822,645
Cash and cash equivalents at end of year	<u>\$ 6,917,680</u>	<u>\$ 9,029,385</u>
Cash paid for interest	<u>\$ 287,068</u>	<u>\$ 354,750</u>
Supplemental disclosure of noncash investing and financing activities:		
Financed purchases of property and equipment	\$ 129,890	\$ 108,539
Other noncash additions of property and equipment	526,276	385,984

The accompanying notes are an integral part of these combined financial statements.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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**1. Summary of Significant Accounting Policies**

**Organization**

AMikids, Inc. and affiliated member institutes and schools, non-profit corporations (collectively referred to as "AMikids" or the "Organization"), are engaged in the rehabilitation of delinquent youth by providing education, treatment and behavior modification as components of the AMikids Personal Growth Model. These services are performed by AMikids through over sixty affiliated, but independently governed member institutes and schools located in Florida, South Carolina, North Carolina, Louisiana, Virginia, Georgia, Texas, and New Mexico. AMikids' operating funds are primarily generated from state and federal contracts, local funding, contributions and boat program operations. AMikids, Inc. executes the majority of contracts, collects funds, coordinates the operations, and manages the record keeping of these member institutes and schools.

As part of the combined group, the AMikids Foundation, Inc. supports the group in raising funds and investment management.

Continued operation of AMikids' rehabilitation programs is dependent on funding from state, federal and local agencies.

**Use of Estimates**

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, and the disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results may differ from such estimates and such differences could be material.

**Basis of Presentation**

The combined financial statements include the accounts of AMikids, Inc., AMikids Foundation, Inc., and affiliated member institutes and schools. All significant intercompany balances and transactions have been eliminated. The accompanying combined financial statements are presented on the accrual basis of accounting. Assets are presented in the accompanying combined statement of financial position according to their nearness of conversion to cash, and liabilities according to the nearness of their maturity and resulting use of cash.

Unrestricted net assets consist of amounts that are available for use in carrying out the activities of AMikids. Temporarily restricted net assets represent those amounts which are not available until future periods or are donor restricted for specific purposes. Permanently restricted net assets result from gifts and bequests from donors who place restrictions on the use of the funds which mandate that the original principal be invested in perpetuity.

**Cash and Cash Equivalents**

Cash and cash equivalents represent cash and highly liquid investments with original maturities of three months or less.

Cash is maintained in bank deposit accounts, which at times may exceed federally insured limits. AMikids believes it is not exposed to any significant credit risk in these accounts.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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**Investments and Investment Income**

Investments are recorded at cost at the time of purchase. Donated securities are recorded at fair value at the time of donation. Subsequent changes in fair value, regardless of how an investment is obtained, are determined based on quoted market prices, and values provided by the investment sponsors, and are recorded as unrealized gains and losses. Net appreciation (depreciation) of investments reflects the net realized and unrealized gains and losses of investments during the reporting period. Interest and dividends are recorded as earned. Dispositions of securities are reflected in the combined financial statements as of the trade date.

**Accounts Receivable**

Accounts receivable consists primarily of receivables from federal and state agencies and county school boards. AMikids considers these accounts receivable to be fully collectible and therefore has not recorded an allowance for doubtful accounts. Amounts becoming uncollectible will be charged to operations when that determination is made. As of June 30, 2012, the Organization did not consider its pledges receivable, which are included in accounts receivable – other, fully collectible and had therefore recorded an allowance of \$349,250. In 2013, the uncollectible amount of \$346,250 was written off.

**Boat Inventory**

Boat inventory represents boats held for resale which are valued at estimated fair value at the time of the donation. Fair value is estimated based on third party appraisals, broker valuations and management's experience with the boat charter industry. Fair values are reviewed quarterly by management and are reduced when necessary. Adjustments to fair value are recorded as a reduction in boat program revenue if the adjustment is made during the year of the donation and as an increase in boat program expense if made in subsequent years. Normal expenditures for repairs and maintenance of boats are expensed as incurred.

Some boat donations are structured in a way where AMikids, Inc. pays for a portion of the value of the donated boat and reduces boat program revenues. For the years ended June 30, 2013 and 2012, no such donations were received.

**Boats under Lease**

AMikids charters its boats to third parties under operating leases for periods of up to three years or less. The operating leases contain options to purchase the boat at the end of the charter period for the fair value estimated by management at lease inception, with all of the charter payments applied to the purchase price. Revenues are recognized as received, except for security deposits that are recognized if and when the purchase option is exercised. If the purchase option is not exercised, the boat is returned to AMikids, Inc. and the security deposit is returned to the lessee after deducting all necessary expenses for the boat to be in the same condition as at time of initiation of the lease.

Future minimum lease payments due under operating leases during fiscal years 2014, 2015 and 2016 are approximately \$1,058,000 \$408,000 and \$111,000, respectively. At June 30, 2013 and 2012, the unexercised purchase options were approximately \$4,100,000 and \$4,272,000, respectively. The gross value and accumulated depreciation on leased property as of June 30, 2013 was approximately \$10,740,000 and \$4,840,000 respectively. The gross value and accumulated depreciation on leased property as of June 30, 2012 was approximately \$10,250,000 and \$3,909,000, respectively. Amortization of boats under lease amounted to \$1,777,805 and \$2,120,332 for the years ended June 30, 2013 and 2012, respectively. Amortization does not include the book value of boats optioned or

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

sold to buyers, which was \$1,339,703 and \$1,712,605 for the years ended June 30, 2013 and 2012, respectively.

**Property and Equipment**

Property and equipment are stated at cost if purchased, or at estimated fair value at date of receipt if acquired by gift. Property and equipment transferred to an institute or school by a funding agency are stated at estimated fair value at date of transfer. Property and equipment transferred or acquired with grant funds may revert to the funding agency should the institute or school no longer provide the services required by the contract. At the time property is retired, or otherwise disposed of, the asset and related accumulated depreciation are removed from the accounts and any resulting gain or loss is included in earnings. Repairs and maintenance are expensed when incurred. Depreciation and amortization is calculated using the straight-line method over the following estimated useful lives of the assets (shorter of estimated useful life or term of the lease as to leasehold improvements) as follows:

Permanent site improvements	3-30 years
Buildings and leasehold improvements	5-30 years
Furniture, fixtures and equipment	3-5 years
Motor vehicles	3-5 years
Boats, motors and trailers	3 years
Swimming pools	10 years

**Assets Held for Sale**

As of June 30, 2013 and 2012, the Organization intends to sell the following vacated properties and has classified the net book value of the land, building and improvements as held for sale on the combined statement of financial position:

<u>Institute</u>	<u>Property held for sale</u>	<u>2013</u>	<u>2012</u>
AMikids Inc	Land	\$ 178,600	\$ -
Manatee	Land, buildings and improvements	300,000	-
Middle Georgia	Land, buildings and improvements	151,047	-
Northeast Louisiana	Land and improvements	100,000	-
Panama City Marine	Land	140,000	-
Pasco	Land	110,000	110,000
Peninsula	Land, buildings and improvements	143,875	299,750
Jefferson	Land, buildings and improvements	200,000	-
Louisiana Properties	Land, buildings and improvements	405,163	-
WINGS Texas	Land, buildings and improvements	322,610	322,610
		<u>\$2,051,295</u>	<u>\$ 732,360</u>

**Impairment of Long-Lived Assets**

AMikids reviews all long-lived assets, which consist primarily of property and equipment, for impairment whenever events or changes in circumstances indicate that the carrying amount of an asset may not be recoverable. Recoverability of assets to be held and used is measured by a comparison of the carrying amount of an asset to future net undiscounted cash flows expected to be generated by the asset. If such assets are considered to be impaired, the impairment to be recognized

**AMIkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
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is measured by the amount by which the carrying amount of the assets exceeds the discounted cash flows. During 2013 and 2012, the Organization recorded write-offs of long-lived assets and impairment charges for assets held for sale as follows:

<b>Institute</b>	<b>Description of property</b>	<b>Reason for impairment</b>	<b>Fair value measurement</b>	<b>2013</b>	<b>2012</b>
AMIkids	Land	Changed intended usage	Purchase offer	\$ -	\$ 111,623
Chicago	Leasehold improvements	Closure of facility	Complete write-off	-	13,477
Pasco	Land, buildings and improvements	Closure of facility	Purchase offer	-	316,800
Polk	Leasehold improvements	Closure of facility	Complete write-off	-	53,991
Baxley	Buildings and site improvements	Closure of facility	Complete write-off	95,031	-
Bayou	Land improvements	Closure of facility	Complete write-off	63,519	-
Manatee	Land, buildings and improvements	Closure of facility	Comparable sales	555,958	-
Northeast Louisiana	Land and improvements	Closure of related facility	Listing price	51,993	-
Panama City Marine	Land	Changed intended usage	Listing price	327,000	-
Peninsula	Land, buildings and improvements	Purchase offer	Purchase offer	155,875	-
Jefferson	Land, buildings and improvements	Closure of facility	Listing price	155,100	-
Louisiana Properties <sup>1</sup>	Land, buildings and improvements	Closure of facility	Listing price	108,734	-
				<u>\$ 1,513,210</u>	<u>\$ 495,891</u>

<sup>1</sup>Reflects real property leased to AMIkids Southwest Louisiana until it ceased operations in 2013 due to loss of funding

Fair value for the above impairments was based on actual offers to purchase the property, the listed price less estimated costs to sell, or comparable sales for similar properties in similar areas. Impairment charges are included in impairment and other expenses within management and general on the combined statement of functional expenses.

**Deferred revenue**

Deferred revenue is related to grant payments collected in advance of revenue recognition.

**Use of Facilities**

Facilities provided by a funding agency to an institute or school for use during the term of its contract are recorded as an in-kind contribution and rental expense in the financial statements in the period in which the facilities are utilized by the institute or school. The amounts recorded in each period of use by the institute or school represent the difference between the fair rental value of the facilities and the stated amount of the rent payments. The stated amount of the rent payments is generally zero. In-kind rental contributions and the related rental expense were approximately \$510,000 and \$531,000 for the years ended June 30, 2013 and 2012, respectively, and are reflected as contributions revenue and rent and utilities expense, respectively, in the accompanying combined financial statements.

**Public Support and Revenue**

Public support is primarily from contracts with various federal, state and local agencies. Contracts with state and some federal agencies generally provide funding based on client service days. Regional revenue represents amounts received from local sources, including county school boards, United Way agencies and other contributions. Other revenue is primarily special fundraising events.

A significant portion of AMIkids' contracts are exchange transactions in which each party receives and sacrifices commensurate value. Funds from these exchange transactions are not considered contributions and, as such, are deemed to be earned and reported as revenue when such funds have been expended towards the designated purpose.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
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**(With comparative financial information for 2012)**

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Contributions received are measured at their fair values and are reported as increases in net assets. AMikids reports contributions of cash and other assets as restricted support if they are received with donor stipulations that limit the use of the donated assets, or if they are designated as support for future periods. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the combined statement of activities as net assets released from restrictions.

**Donated Services**

Amounts are reported in the financial statements for voluntary donations of services when those services create or enhance non-financial assets or require specialized skills provided by the individuals possessing those skills and would be typically purchased if not provided by donation. For the years ended June 30, 2013 and 2012, donated services were not material to the financial statements.

**Fair Value of Financial Instruments**

The Institute reports its financial assets and liabilities using a three-tier hierarchy, which prioritizes the inputs used in measuring fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements).

The three levels of the fair value hierarchy are described below:

- Level 1 – Valuation based on unadjusted quoted prices in active markets for identical assets or liabilities.
- Level 2 – Valuation based on observable quoted prices for similar assets and liabilities in active markets.
- Level 3 – Valuation based on inputs that are unobservable and are supported by little or no market activity, therefore requiring management's best estimate of what market participants would use as fair value.

A financial instrument's level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement.

Fair value estimates discussed herein are based upon certain market assumptions and pertinent information available to management. The respective carrying value of certain on-balance-sheet financial instruments approximates their fair values due to the short-term nature of these instruments. These financial instruments include cash and cash equivalents, accounts receivable, accounts payable, and accrued expenses. The fair value of the lines of credit and notes payable are estimated based on current rates that would be available for debt of similar terms which is not significantly different from its stated value.

The Organization's Level 1 financial assets as of June 30, 2013 and 2012 consist of investments of \$5,654,437 and \$2,187,660, respectively. Level 1 investments include pooled equity funds, pooled fixed income funds, equity securities and government securities valued based on quoted market prices. Level 2 financial assets as of June 30, 2013 and 2012 consist of corporate bonds (included in pooled fixed income funds in Note 2) of \$96,522 and \$171,056, respectively, and cash surrender of insurance policies of \$72,831 and \$69,327, respectively. Corporate bonds are valued based upon recent bid prices. The cash surrender value of insurance policies is the quoted market prices of the underlying securities. The Organization has no Level 3 financial instruments.

**AMIkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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**Functional Allocation of Expenses**

The costs of providing the various programs and other activities have been summarized on a functional basis. Accordingly, certain costs have been allocated among the program and supporting services benefited. Other expenses are allocated based on management's estimate of the benefit derived by each activity.

**Income Taxes**

AMIkids, Inc. and affiliated member institutes and schools are exempt from income tax under Section 501(c)(3) of the Internal Revenue Code. There is minimal income tax associated with unrelated business income mainly from the sale of donated boats.

The Organization identifies and evaluates uncertain tax positions, if any, and recognizes the impact of uncertain tax positions for which there is a less than more-likely-than-not probability of the position being upheld when reviewed by the relevant taxing authority. Such positions are deemed to be unrecognized tax benefits and a corresponding liability is established on the statement of financial position. The Organization has not recognized a liability for uncertain tax positions. If there were an unrecognized tax benefit, the Organization would recognize interest accrued related to unrecognized tax benefits in interest expense and penalties in operating expenses. The Organization's tax years subject to examination by the Internal Revenue Service generally remain open for three years from the date of filing.

**Summarized Financial Information for 2012**

The financial information for the year ended June 30, 2012 is presented for comparative purposes, and is not intended to be a complete presentation. Certain amounts for fiscal 2012 have been reclassified to conform with their presentation in the 2013 financial statements with no impact on total net assets or changes in net assets.

**2. Investments**

Investments at June 30, 2013 and 2012 consist of:

	2013		2012	
	Cost	Fair value	Cost	Fair value
Restricted cash equivalents	\$ -	\$ -	\$ 100,000	\$ 100,000
Certificates of deposit	2,444,872	2,431,530	5,667,516	5,673,860
Pooled equity funds	1,177,238	1,511,369	1,354,399	1,504,799
Pooled fixed income funds	474,247	484,899	499,437	537,716
Equity securities	77,147	87,203	256,229	316,201
Cash surrender value of insurance policies	72,831	72,831	69,327	69,327
Government securities	3,689,511	3,667,488	-	-
	<u>\$ 7,935,846</u>	<u>\$ 8,255,320</u>	<u>\$ 7,946,908</u>	<u>\$ 8,201,903</u>

**AMIkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

Investment income was comprised of the following for the years ended June 30, 2013 and 2012:

	<u>2013</u>	<u>2012</u>
Interest and dividends	\$ 113,956	\$ 115,430
Net realized and unrealized gains	178,272	20,824
	<u>\$ 292,228</u>	<u>\$ 136,254</u>

**3. Property and Equipment**

Property and equipment at June 30, 2013 and 2012 consist of:

	<u>2013</u>	<u>2012</u>
Land and permanent site improvements	\$ 3,825,915	\$ 5,675,949
Buildings and leasehold improvements	21,319,541	24,772,289
Furniture, fixtures and equipment	8,707,444	9,313,050
Motor vehicles	2,712,422	3,828,361
Boats, motors and trailers	812,697	812,654
Swimming Pools	469,723	492,319
Construction in progress (estimate to complete is \$829,000)	131,258	416,439
	<u>37,979,000</u>	<u>45,311,061</u>
Less accumulated depreciation and amortization	<u>(26,448,697)</u>	<u>(29,425,831)</u>
	<u>\$ 11,530,303</u>	<u>\$ 15,885,230</u>

Included in furniture, fixtures and equipment are assets recorded under capital leases with a cost and accumulated depreciation of \$174,270 and \$111,294, respectively, at June 30, 2013 and \$303,217 and \$161,168 respectively, at June 30, 2012.

Certain of AMIkids' affiliated institutes and schools have purchased various assets with contract funds. Under the terms of these contracts, the funding agency may require such assets to be returned upon termination of the contract or program.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

**4. Lines of Credit**

Lines of credit at June 30, 2013 and 2012 consist of:

Entity		2013	2012
<b>AMikids, Inc.</b>	Line of Credit, maximum available \$3,000,000, bearing interest at the LIBOR Index plus 2.25%, (interest rate at June 30, 2013 was 2.44%), expiring January 2014, collateralized by government receivables	\$ -	\$ -
<b>AMikids, Inc.</b>	Line of Credit, maximum available \$6,000,000, bearing interest at the LIBOR Index plus 2.25%, (interest rate at June 30, 2013 was 2.44%), expiring January 2014, collateralized by vessel inventory and lease receivables	1,000,000	-
<b>Jacksonville</b>	Line of credit, maximum available \$700,000, bearing interest at LIBOR Rate plus 3.5%; interest-only through October 1, 2013 with 20-year principal amortization thereafter; due April 1, 2018, collateralized by real estate	-	-
<b>Panama City</b>	Line of credit, maximum available \$103,000, interest-only with interest at 5.5%, due July 2013; collateralized by equipment; paid August 2013 with a five year promissory note.	103,000	-
<b>Space Coast</b>	Line of Credit, maximum available \$100,000, interest rate tied to the WSJ Prime Rate plus 1.5% with a floor rate of 5% (interest rate at June 30, 2013 was 5.00%), expiring December 2013, collateralized by building	-	-
<b>Tampa</b>	Line of Credit, maximum available was \$20,000, interest at prime plus 2%, due on demand, uncollateralized; line was terminated in 2013	-	940
<b>Total Lines of Credit</b>		<b>\$ 1,103,000</b>	<b>\$ 940</b>

The AMikids, Inc. lines of credit are cross-collateralized and are secured by the borrowing-base assets disclosed above as well as other assets of AMikids, Inc.

At June 30, 2013, the Organization had a maximum of approximately \$8,800,000 available under lines of credit, subject to availability based on asset levels. The actual amount available based on asset levels as of June 30, 2013 was approximately \$6,668,000. The AMikids, Inc. lines of credit contain restrictive financial covenants related to unrestricted net assets, liquidity to modified debt ratio, and the maintenance of minimum cash and marketable securities levels. The Organization was in compliance with debt covenants as of and for the years ended June 30, 2013 and 2012.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

**5. Notes Payable**

Notes payable at June 30, 2013 and 2012 consists of:

Entity	2013	2012
<b>AMikids, Inc.</b> Mortgage payable bearing interest at LIBOR index plus 2.1% (interest rate at June 30, 2013 was 2.29%); monthly installments of \$7,711 plus interest, due April 2017 with a final payment of \$7,843, collateralized by building	\$ 351,041	\$ 443,571
<b>AMikids, Inc.</b> Mortgage payable bearing interest at LIBOR index plus 2.1% (interest rate at June 30, 2013 was 2.29%); monthly installments of \$4,564 plus interest, due April 2017 with a final payment of \$4,565, collateralized by building	209,956	264,727
<b>Beaufort</b> Note payable in monthly installments of \$664, including interest at 1.99%, due August 2018, collateralized by vehicle	37,895	-
<b>Beaufort</b> Note payable in monthly installments of \$666, including interest at 2.2%, due October 2018, collateralized by vehicle	39,561	-
<b>Baton Rouge</b> Mortgage payable of up to \$500,000 in yearly installments of \$25,000 or equivalent service to clients commencing one year after construction, interest at 0.0%, due February 2034, collateralized by land; project was cancelled and repayment made in 2013	-	200,000
<b>Baton Rouge</b> Note payable in monthly installments of \$1,783 including interest at 5.9%, due September 2014, collateralized by vehicles	19,333	38,921
<b>Baton Rouge</b> Note payable in monthly installments of \$792, including interest at 5.9%, due August 2016; collateralized by vehicle	27,388	35,005
<b>Georgetown</b> Note payable in monthly installments of \$956, including interest at 6.7%, due November 2016; collateralized by vehicles	30,247	-
<b>Jacksonville</b> Note payable in monthly installments of \$500, including interest at 13.3%, due March 2015, collateralized by equipment under capital lease	9,313	13,748
<b>Jefferson</b> Mortgage payable in monthly principal installments of \$2,398, plus interest of LIBOR Index rate plus 2.1%, (interest rate at June 30, 2013 was 2.29%); due April 2017, collateralized by three modular buildings,	108,269	137,042

**AMlkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
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**(With comparative financial information for 2012)**

Entity		2013	2012
<b>Louisiana Properties</b>	Mortgage payable in monthly installments of \$24,085, plus interest of 5.2% , due August 2016, collateralized by real estate in Branch, Louisiana and Lake Charles, Louisiana	819,918	1,608,323
<b>Manatee</b>	Note payable in monthly installments of \$746, including interest at 10%, due December 2013, paid negotiated amount and returned equipment in 2013	-	12,421
<b>Orlando</b>	Mortgage payable in monthly installments of \$1,370 including interest at 7.25%, due November 2017, collateralized by building	62,446	73,325
<b>Pasco</b>	Mortgage payable in monthly installments of \$1,485 including interest at 7.70%, due August 2021, collateralized by building. Building sold and note paid in 2013.	-	118,048
<b>Palm Beach</b>	Note payable in monthly installments of \$513, including interest at 4%, due April 2017, paid negotiated amount and returned equipment in 2013	-	24,597
<b>Panama City</b>	Note payable in monthly installments of \$681, including interest at 5%, due May 2018; uncollateralized	35,484	-
<b>Panama City</b>	Mortgage payable in monthly installments of \$3,103 including interest at 4.5%, balloon payment of \$295,643, due January 2022, collateralized by land and buildings	465,838	481,430
<b>Pensacola</b>	Mortgage payable in monthly installments of \$1,337, including interest at 6%, due December 2014 with final balloon payment of \$68,529, collateralized by building	85,954	96,422
<b>Piedmont</b>	Mortgage payable in monthly installments of \$662 including interest at 6.5%, balloon payment of approx \$29,400, due November 2016, collateralized by building	47,460	52,160
<b>Virginia Wilderness</b>	Note payable in monthly installments of \$5,000, including interest at 6%, due September 2014; uncollateralized	36,787	-
<b>Various</b>	Various notes payable, monthly installments from \$97 to \$577, various interest rates, due various dates through May 2017, collateralized by vehicles and equipment.	61,599	132,088
<b>Total Notes Payable</b>		<b>\$ 2,448,489</b>	<b>\$ 3,731,828</b>

**AMIkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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AMIkids, Inc. has guaranteed the notes payable for Louisiana Properties and Jefferson.  
Principal payments on notes payable for years subsequent to June 30, 2013 are as follows:

2014	\$ 576,394
2015	611,090
2016	543,700
2017	290,502
2018	50,252
Thereafter	376,551
	<u>\$ 2,448,489</u>

**6. Accrued Expenses**

Accrued expenses at June 30, 2013 and 2012 consist of:

	<u>2013</u>	<u>2012</u>
Workers compensation self-insurance reserve	\$ 4,122,594	\$ 3,377,513
Vehicle and other self-insurance reserve	764,213	208,612
Medical self-insurance reserve	500,000	535,259
Accrued payroll	475,709	618,026
Accrued vacation	693,333	931,354
Accrued severance and unemployment	1,088,236	718,661
Accrued boat program payments	171,158	737,995
Other accruals	736,069	724,253
	<u>\$ 8,551,312</u>	<u>\$ 7,851,673</u>

**7. Restrictions and Limitations on Net Assets**

Temporarily restricted net assets consist of the following at June 30, 2013 and 2012:

	<u>2013</u>	<u>2012</u>
Education/scholarship	\$ 760,829	\$ 943,554
Building / Equipment	618,725	1,088,668
Girls Initiative Program	420,469	419,505
Experiential Activities	242,265	354,518
Other	207,367	192,069
	<u>\$ 2,249,655</u>	<u>\$ 2,998,314</u>

Permanently restricted net assets represent endowment funds invested in perpetuity. The income from the endowment funds is restricted to assist former students of AMIkids' programs with educational or employment-related expense. During 2013, \$100,000 of permanently restricted net assets was transferred to unrestricted net assets as it was determined the donor never intended the contribution to be a permanent endowment.

In June 2011, the State of Florida adopted the Florida Uniform Prudent Management of Institutional Funds Act ("FUPMIFA"). FUPMIFA establishes statutory law governing Florida not-for-profit

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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corporation's management of investments and is effective for institutional funds existing on or established after July 1, 2012.

The Board of Trustees of the Organization has interpreted FUPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds, absent explicit donor stipulations to the contrary. As a result of this interpretation, the Organization classifies as permanently restricted net assets: (a) the original value of the gift donated to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Organization in a manner consistent with the standard of prudence prescribed by FUPMIFA. In accordance with FUPMIFA, the Organization considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund;
- (2) The purposes of the Organization and the donor-restricted endowment fund;
- (3) General economic conditions;
- (4) The possible effect of inflation and deflation;
- (5) The expected total return from income and the appreciation of investments;
- (6) Other resources of the Organization;
- (7) The investment policies of the Organization.

The adoption of FUPMIFA had no impact to the Institute's financial statements.

**8. Net Assets Released From Restrictions**

Net assets were released from donor restrictions by occurrence of events specified by donors as follows for the years ended June 30, 2013 and 2012.

	2013	2012
Education/scholarship	\$ 236,896	\$ 191,743
Building/ Equipment	759,139	128,502
Experiential Activities	1,758,872	173,677
Other	638,425	195,110
	<u>\$ 3,393,332</u>	<u>\$ 689,032</u>

**AMIKids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

**9. Net Assets**

The following reflects the separate components of net assets of AMIKids, Inc., AMIKids Foundation and combined Member Institutes and Schools:

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>AMIKids, Inc.</b>				
Net Assets June 30, 2011	\$ 21,578,995	\$ 44,512	\$ 50,000	\$ 21,673,507
Change in Net Assets	(940,299)	1	-	(940,298)
Net Assets June 30, 2012	20,638,696	44,513	50,000	20,733,209
Change in Net Assets	(7,224,940)	7,319	-	(7,217,621)
Net Assets June 30, 2013	13,413,756	51,832	50,000	13,515,588

**AMIKids Foundation**

Net Assets June 30, 2011	232,764	767,620	7,090	1,007,474
Change in Net Assets	(164,242)	149,740	-	(14,502)
Net Assets June 30, 2012	68,522	917,360	7,090	992,972
Change in Net Assets	26,180	(66,962)	-	(40,782)
Net Assets June 30, 2013	94,702	850,398	7,090	952,190

**Member Institutes and Schools**

Net Assets June 30, 2011	12,761,810	2,038,885	100,000	14,900,695
Change in Net Assets	(2,832,382)	(2,444)	-	(2,834,826)
Net Assets June 30, 2012	9,929,428	2,036,441	100,000	12,065,869
Change in Net Assets	(1,590,611)	(689,016)	(100,000)	(2,379,627)
Net Assets June 30, 2013	8,338,817	1,347,425	-	9,686,242
Total Net Assets as of June 30, 2013	\$ 21,847,275	\$ 2,249,655	\$ 57,090	\$ 24,154,020

**10. Commitments and Contingencies**

A substantial portion of AMIKids' public support is derived from programs supported by various funding agencies. Under the terms of the agreements with the funding agencies, AMIKids' financial records are subject to audit by the appropriate governmental authorities. Depending on the results of these audits, if any, funds may be required to be refunded to the appropriate agency.

AMIKids is subject to various claims and legal proceedings which arise in the ordinary course of business. AMIKids does not believe that these matters will have a material adverse effect on its financial position or results of operations.

AMIKids leases facilities under operating leases expiring in various years. Rent expense on these operating leases charged to operations for the years ended June 30, 2013 and 2012 was approximately

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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\$725,000 and \$845,000, respectively. Based on the current operating leases the annual lease expense is expected to remain consistent with 2013 expense over the next five years. Typically there are no operating leases with terms greater than five years.

AMikids receives donations of boats that are valued at estimated fair value at the time of the donation. Management has estimated the value of the boat inventory at \$1,822,460 and \$2,902,069 at June 30, 2013 and 2012, respectively. Fair value is estimated based on third party appraisals, broker valuations and management's experience with the boat charter industry. The actual fair value of the boats is not known until the boat is sold or leased.

AMikids has purchased high-deductible policies for workers compensation and for vehicle and other property and casualty insurance and is responsible for all claims below the deductible level. The company is fully insured for vehicle claims incurred after August 31, 2009. Management has accrued approximately \$4,887,000 and \$3,586,000 at June 30, 2013 and 2012, respectively, as an estimate of losses on unpaid claims under these insurance policies. These accruals are estimated based on current and historical claims experience. It is reasonably possible that these estimates will change and, if changed, could have a material impact on the Organization's financial position and results of operations. Under AMikids' workers compensation and vehicle policies, the Organization has provided the insurance carrier letters of credit for approximately \$1,500,000, which is collateralized by investments and cash and cash equivalents held by AMikids. There is also an additional \$3,500,000 held in a secured collateralized account to support these policies. Total investments and cash and cash equivalents of \$6,000,000 support the expected insurance commitments, including the required letters of credit and collateralized investment accounts.

AMikids is self insured for group health insurance up to a maximum of \$125,000 per employee. Management has accrued approximately \$500,000 and \$535,000 at June 30, 2013 and 2012, respectively, for estimated claims, including known claims and claims which are estimated to have occurred but which have not yet been reported. This estimate is based on current and historical claims experience and other information obtained from AMikids' insurance provider. It is reasonably possible that these estimates will change and, if changed, could have a material impact on the Organization's financial position and results of operations. Adjustments to the estimated claims accrual are made when the need for such adjustments becomes apparent.

#### **11. Retirement Plans**

AMikids maintains a noncontributory defined contribution pension plan covering all full-time employees who have completed two years of service and have attained the age of 20-1/2 years. Contributions to the plan are based on a percentage of each employee's total compensation for the year. The pension expense for the years ended June 30, 2013 and 2012 was approximately \$1,623,000 and \$2,061,000, respectively, and is included in employee benefits and payroll taxes on the combined statement of functional expenses.

AMikids has certain supplemental pension agreements with key members of management, which are accrued for and included in accrued pension in the combined statement of financial position. The supplemental pension is generally funded on an annual basis and the related assets are included as a component of investments.

**AMikids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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**12. Related Party Transactions**

There were no related party transactions significant to the combined financial statements. AMikids has rigorous controls concerning related party transactions to ensure that all transactions are in the best interest of the mission. Details of related party transactions can be found in Form 990s which AMikids files annually with the Internal Revenue Service.

**13. Institute Openings and Closings**

During the fiscal year ended June 30, 2013, AMikids opened AMikids Lafayette, Inc., which operates the School Safety Intervention Model of the AMikids Center for Academic Discipline program for 30 youths. As part of AMikids Pensacola, Inc., AMikids also opened the Escambia Boys Base residential program which serves 28 youths.

During 2013 and due to a loss of funding, the following Institutes were closed: AMikids Alexandria, Inc., AMikids Baxley, Inc., AMikids Bayou Region, Inc., AMikids Donaldsonville, Inc., AMikids Jefferson, Inc., AMikids Last Chance Ranch, Inc., AMikids Middle Georgia, Inc., AMikids Norfolk, Inc., AMikids Northeast Louisiana, Inc., AMikids Red River, Inc., AMikids Savannah River, Inc., AMikids Sarasota County, Inc., AMikids Southwest Louisiana, Inc., AMikids West Florida, Inc., and AMikids WINGS South Florida, Inc. AMikids continues to pursue alternative funding with the possibility that some of these programs could reopen at a future date.

The Organization paid approximately \$306,000 and \$108,000 of severance and unemployment costs, respectively, during 2013 related to these closures. In addition, approximately \$1,025,000 has been recorded in accrued expenses as of June 30, 2013 for future payments of unemployment, severance and other payroll costs related to staff terminated pursuant to these closures. The total amount expensed during the year ended June 30, 2013 related to one-time termination benefits was approximately \$1,439,000 and is included in program expenses on the accompanying combined statement of activities. Of this amount, \$475,000 is included in salaries and \$964,000 is included in employee benefits and payroll taxes on the accompanying combined statement of functional expenses.

During fiscal year ended June 30, 2012 and due to a loss of funding, the AMikids Polk, Inc., AMikids Infinity Chicago, Inc., AMikids Manatee, Inc., and the AMikids Palm Beach, Inc. Institutes were closed. The Organization paid approximately \$5,000 of severance costs during 2012 related to these closures. In addition, approximately \$160,000 had been recorded in accrued expenses as of June 30, 2012 for future payments of unemployment and severance costs related to staff terminated pursuant to these closures. The total amount expensed during the year ended June 30, 2012 related to one-time termination benefits was approximately \$165,000 and is included in program expenses on the accompanying combined statement of activities. Of this amount, \$54,000 is included in salaries and \$111,000 is included in employee benefits and payroll taxes on the accompanying combined statement of functional expenses. As of June 30, 2013, approximately \$26,700 remains in accrued unemployment expense related to these closures.

**AMIkids, Inc. and Affiliates**  
**Notes to Combined Financial Statements**  
**Year ended June 30, 2013**  
**(With comparative financial information for 2012)**

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**14. Subsequent Events**

The Organization has evaluated events and transactions occurring subsequent to June 30, 2013 as of September 18, 2013, which is the date the combined financial statements were issued. Subsequent events occurring after September 17, 2013 have not been evaluated by management. No material events have occurred since June 30, 2013 that require recognition or disclosure in the combined financial statements.

## **Independent Auditors' Report on Supplementary Information**

Board of Trustees  
AMIKids, Inc.

Our audit of the basic combined financial statements included in the preceding section of this report was performed for the purpose of forming an opinion on those statements taken as a whole. The supplementary information presented in the following section of this report is presented for purposes of additional analysis and is not a required part of the basic combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic combined financial statements or to the basic combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the basic combined financial statements taken as a whole.

*Cross, Fernandez & Riley, LLP*

Certified Public Accountants

Tampa, Florida  
September 17, 2013

**AMikids, Inc. and Affiliates**  
**Combining Schedule - Statement of Financial Position Information**  
**June 30, 2013**

**Schedule I**

	<b>AMikids</b>	<b>AMikids Acadiana</b>	<b>AMikids Foundation</b>	<b>AMikids Gainesville</b>	<b>AMikids Family Services</b>	<b>AMikids Baton Rouge</b>	<b>AMikids Baxley Wilderness</b>	<b>AMikids Beaufort</b>
<b>Assets</b>								
Cash and Cash Equivalents	\$ 1,101,462	\$ 20,172	\$ 2,950,230	\$ 15,580	\$ 57,997	\$ 51,662	\$ -	\$ 44,934
Investments	6,535,174	-	544,182	-	-	-	-	448,487
Accounts Receivable:								
Funding Agencies	3,419,407	-	-	10,552	-	93,537	-	4,975
Other, net	432,427	11,231	-	7,038	-	7,551	-	18,136
Prepaid Expenses and Other Assets	620,107	41,365	-	25,832	59,828	42,767	-	44,205
Assets Held for Sale	178,600	-	-	-	-	-	-	-
Due from Affiliates	10,766,928	117,834	-	40,616	471,410	26,922	-	106,271
Boat Inventory	1,822,460	-	-	-	-	-	-	-
Boats under Lease	5,737,691	-	-	-	-	-	-	-
Property and Equipment, Net	701,622	18,546	-	129,190	12,419	480,877	32,405	368,492
	<u>\$ 31,315,878</u>	<u>\$ 209,148</u>	<u>\$ 3,494,412</u>	<u>\$ 228,808</u>	<u>\$ 601,654</u>	<u>\$ 703,316</u>	<u>\$ 32,405</u>	<u>\$ 1,035,500</u>
<b>Liabilities and Net Assets (Deficit)</b>								
<b>Liabilities:</b>								
Lines of Credit	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	488,553	38,007	-	23,342	24,930	24,613	-	25,732
Accrued Expenses	11,642,050	38,057	1,082	26,222	24,536	86,570	-	41,719
Accrued Pension	-	-	-	-	-	-	-	-
Due to Affiliates	2,741,021	1,552,615	2,541,140	531,995	20,834	133,681	-	24,862
Deferred Revenues	6,290	-	-	27,474	-	-	12,280	-
Security Deposits	1,598,246	-	-	-	-	-	-	-
Notes Payable	560,997	-	-	8,248	-	46,721	-	77,456
Total Liabilities	<u>18,037,157</u>	<u>1,628,679</u>	<u>2,542,222</u>	<u>617,281</u>	<u>70,300</u>	<u>291,585</u>	<u>12,280</u>	<u>169,769</u>
<b>Net Assets (Deficit):</b>								
Unrestricted	13,176,889	(1,435,521)	94,702	(392,746)	531,354	387,015	20,125	834,005
Temporarily Restricted	51,832	15,990	850,398	4,273	-	24,716	-	31,726
Permanently Restricted	50,000	-	7,090	-	-	-	-	-
Total Net Assets (Deficit)	<u>13,278,721</u>	<u>(1,419,531)</u>	<u>952,190</u>	<u>(388,473)</u>	<u>531,354</u>	<u>411,731</u>	<u>20,125</u>	<u>865,731</u>
	<u>\$ 31,315,878</u>	<u>\$ 209,148</u>	<u>\$ 3,494,412</u>	<u>\$ 228,808</u>	<u>\$ 601,654</u>	<u>\$ 703,316</u>	<u>\$ 32,405</u>	<u>\$ 1,035,500</u>

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**AMikids, Inc. and Affiliates**  
**Combining Schedule - Statement of Financial Position Information**  
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**Schedule I**

	AMikids Big Cypress	AMikids Bennettsville	AMikids Sand Hills	AMikids White Pines	AMikids Donaldsonville	AMikids Crossroads	AMikids Miami Dade
<b>Assets</b>							
Cash and Cash Equivalents	\$ 76,096	\$ 28,079	\$ 28,717	\$ 26,351	\$ 87	\$ 75,777	\$ 82,547
Investments	-	-	-	-	-	188,483	-
Accounts Receivable:							
Funding Agencies	45,407	6,310	6,195	5,362	-	107,899	72,852
Other, net	3,831	11,286	7,996	9,011	-	26,576	9,322
Prepaid Expenses and Other Assets	42,303	53,558	39,680	37,594	-	43,213	68,613
Assets Held for Sale	-	-	-	-	-	-	-
Due from Affiliates	106,055	107,608	106,476	106,078	-	9,815	138,098
Boat Inventory	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-
Property and Equipment, Net	38,618	69,680	43,560	30,686	-	270,691	363,223
	<u>\$ 312,310</u>	<u>\$ 276,521</u>	<u>\$ 232,624</u>	<u>\$ 215,082</u>	<u>\$ 87</u>	<u>\$ 722,454</u>	<u>\$ 734,655</u>
<b>Liabilities and Net Assets (Deficit)</b>							
<b>Liabilities:</b>							
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	32,758	38,895	38,225	26,082	-	21,618	91,629
Accrued Expenses	47,021	38,393	53,269	49,857	-	53,394	77,208
Accrued Pension	-	-	-	-	-	-	-
Due to Affiliates	575,174	838,861	218,257	299,162	-	239,696	198,030
Deferred Revenues	-	36,396	13,948	14,271	-	-	60,378
Security Deposits	-	-	-	-	-	-	-
Notes Payable	6,038	-	2,398	-	-	1,043	881
Total Liabilities	<u>660,991</u>	<u>952,545</u>	<u>326,097</u>	<u>389,372</u>	<u>-</u>	<u>315,751</u>	<u>428,126</u>
<b>Net Assets (Deficit):</b>							
Unrestricted	(367,050)	(676,024)	(93,473)	(174,290)	87	395,682	222,729
Temporarily Restricted	18,369	-	-	-	-	11,021	83,800
Permanently Restricted	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>(348,681)</u>	<u>(676,024)</u>	<u>(93,473)</u>	<u>(174,290)</u>	<u>87</u>	<u>406,703</u>	<u>306,529</u>
	<u>\$ 312,310</u>	<u>\$ 276,521</u>	<u>\$ 232,624</u>	<u>\$ 215,082</u>	<u>\$ 87</u>	<u>\$ 722,454</u>	<u>\$ 734,655</u>

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**AMIkids, Inc. and Affiliates**  
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**Schedule I**

	AMIkids Emerald Coast	AMIkids Pensacola	AMIkids Last Chance Ranch	AMIkids Greater Ft. Lauderdale	AMIkids Georgia	AMIkids Georgetown	AMIkids Manatee County	AMIkids Sarasota County	AMIkids Infinity Schools, Inc.
<b>Assets</b>									
Cash and Cash Equivalents	\$ 30,077	\$ 79,065	\$ 2,353	\$ 229,441	\$ -	\$ 417,386	\$ 6,927	\$ -	\$ 3,042
Investments	-	19,290	-	-	-	-	-	-	-
Accounts Receivable:									
Funding Agencies	-	-	-	-	-	10,373	-	-	35,159
Other, net	5,505	9,084	-	4,216	-	12,169	-	-	-
Prepaid Expenses and Other Assets	32,915	37,786	2,500	48,352	-	30,133	4,567	-	26,808
Assets Held for Sale	-	-	-	-	-	-	300,000	-	-
Due from Affiliates	29,403	190,970	1,898	65,496	237,549	118,691	450	146,015	12,603
Boat Inventory	-	-	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-	-	-
Property and Equipment, Net	11,511	427,676	22,076	40,364	-	57,940	4,661	986	-
	<u>\$ 109,411</u>	<u>\$ 763,871</u>	<u>\$ 28,827</u>	<u>\$ 387,869</u>	<u>\$ 237,549</u>	<u>\$ 646,692</u>	<u>\$ 316,605</u>	<u>\$ 147,001</u>	<u>\$ 77,612</u>
<b>Liabilities and Net Assets (Deficit)</b>									
<b>Liabilities:</b>									
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	15,295	47,647	293	43,147	-	21,155	1,203	-	3,919
Accrued Expenses	14,948	83,167	20,500	44,332	1,388	40,034	19,005	84,998	10,578
Accrued Pension	-	-	-	-	-	-	-	-	-
Due to Affiliates	162,454	147,284	-	29,431	306	37,321	308,165	-	42,961
Deferred Revenues	11,809	32,373	-	53,236	-	13,420	-	-	-
Security Deposits	-	-	-	-	-	-	-	-	-
Notes Payable	4,694	85,954	-	13,092	-	30,247	-	-	-
Total Liabilities	<u>209,200</u>	<u>396,425</u>	<u>20,793</u>	<u>183,238</u>	<u>1,694</u>	<u>142,177</u>	<u>328,373</u>	<u>84,998</u>	<u>57,458</u>
<b>Net Assets (Deficit):</b>									
Unrestricted	(104,788)	358,376	(1,988)	198,801	30,063	350,493	(11,768)	62,003	14,971
Temporarily Restricted	4,999	9,070	10,022	5,830	205,792	154,022	-	-	5,183
Permanently Restricted	-	-	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>(99,789)</u>	<u>367,446</u>	<u>8,034</u>	<u>204,631</u>	<u>235,855</u>	<u>504,515</u>	<u>(11,768)</u>	<u>62,003</u>	<u>20,154</u>
	<u>\$ 109,411</u>	<u>\$ 763,871</u>	<u>\$ 28,827</u>	<u>\$ 387,869</u>	<u>\$ 237,549</u>	<u>\$ 646,692</u>	<u>\$ 316,605</u>	<u>\$ 147,001</u>	<u>\$ 77,612</u>

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**AMikids, Inc. and Affiliates**  
**Combining Schedule - Statement of Financial Position Information**  
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Schedule I

	AMikids Georgia Properties	AMikids Infinity Wake County	AMikids New Mexico Properties	AMikids Infinity Marlboro	AMikids Lafayette	AMikids North Carolina Family Services	AMikids Jacksonville	AMikids Jefferson
<b>Assets</b>								
Cash and Cash Equivalents	\$ -	\$ 4,638	\$ -	\$ 2,994	\$ 7,193	\$ 36,704	\$ 191,447	\$ 8,293
Investments	-	-	-	-	-	-	-	-
Accounts Receivable:								
Funding Agencies	-	-	-	-	30,667	-	10,600	555
Other, net	-	-	-	-	-	1,376	8,018	-
Prepaid Expenses and Other Assets	-	18,136	-	20,590	10,030	68,552	74,978	100
Assets Held for Sale	-	-	-	-	-	-	-	200,000
Due from Affiliates	147,619	-	756,000	11,142	-	302,785	55,235	-
Boat Inventory	-	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-	-
Property and Equipment, Net	2,417,475	8,679	-	-	-	49,940	199,434	9,597
	<u>\$ 2,565,094</u>	<u>\$ 31,453</u>	<u>\$ 756,000</u>	<u>\$ 34,726</u>	<u>\$ 47,890</u>	<u>\$ 459,357</u>	<u>\$ 539,712</u>	<u>\$ 218,545</u>
<b>Liabilities and Net Assets (Deficit)</b>								
<b>Liabilities:</b>								
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	-	5,801	-	5,249	3,198	30,108	14,424	10,847
Accrued Expenses	203	11,045	203	8,697	5,930	49,347	25,867	41,713
Accrued Pension	-	-	-	-	-	-	-	-
Due to Affiliates	74	10,269	75	49,781	12,807	22,628	32,717	15,986
Deferred Revenues	-	-	-	-	-	-	-	-
Security Deposits	-	-	-	-	-	-	-	-
Notes Payable	-	-	-	-	-	-	9,313	108,269
Total Liabilities	<u>277</u>	<u>27,115</u>	<u>278</u>	<u>63,727</u>	<u>21,935</u>	<u>102,083</u>	<u>82,321</u>	<u>176,815</u>
<b>Net Assets (Deficit):</b>								
Unrestricted	2,564,817	4,338	755,722	(35,642)	25,955	357,274	246,864	41,730
Temporarily Restricted	-	-	-	6,641	-	-	210,527	-
Permanently Restricted	-	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>2,564,817</u>	<u>4,338</u>	<u>755,722</u>	<u>(29,001)</u>	<u>25,955</u>	<u>357,274</u>	<u>457,391</u>	<u>41,730</u>
	<u>\$ 2,565,094</u>	<u>\$ 31,453</u>	<u>\$ 756,000</u>	<u>\$ 34,726</u>	<u>\$ 47,890</u>	<u>\$ 459,357</u>	<u>\$ 539,712</u>	<u>\$ 218,545</u>

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**AMIkids, Inc. and Affiliates**  
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Schedule I

	AMIkids Graduate School	AMIkids Middle Georgia	South Carolina Wilderness Institute	AMIkids Pasco	AMIkids Northeast Louisiana	AMIkids Orlando	AMIkids Panama City Marine Institute
<b>Assets</b>							
Cash and Cash Equivalents	\$ -	\$ -	\$ -	\$ 61,551	\$ -	\$ 82,730	\$ 102,412
Investments	-	-	-	-	-	-	-
Accounts Receivable:							
Funding Agencies	-	-	-	-	-	-	1,135
Other, net	-	-	-	1,028	-	4,107	7,443
Prepaid Expenses and Other Assets	-	-	-	24,242	-	35,813	75,079
Assets Held for Sale	-	151,047	-	110,000	100,000	-	140,000
Due from Affiliates	12,806	-	-	82,645	-	41,565	53,877
Boat Inventory	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-
Property and Equipment, Net	-	18,250	297,502	8,318	3,482	75,424	403,523
	<u>\$ 12,806</u>	<u>\$ 169,297</u>	<u>\$ 297,502</u>	<u>\$ 287,784</u>	<u>\$ 103,482</u>	<u>\$ 239,639</u>	<u>\$ 783,469</u>
<b>Liabilities and Net Assets (Deficit)</b>							
<b>Liabilities:</b>							
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 103,000
Accounts Payable	-	474	-	11,194	-	15,948	42,834
Accrued Expenses	5,917	104	203	14,427	-	73,295	29,008
Accrued Pension	-	-	-	-	-	-	-
Due to Affiliates	6,889	-	1,916	14,136	58,451	71,618	33,415
Deferred Revenues	-	1,362	-	2,152	-	3,807	27,941
Security Deposits	-	-	-	-	-	-	-
Notes Payable	-	-	-	-	-	65,254	501,322
Total Liabilities	<u>12,806</u>	<u>1,940</u>	<u>2,119</u>	<u>41,909</u>	<u>58,451</u>	<u>229,922</u>	<u>737,520</u>
<b>Net Assets (Deficit):</b>							
Unrestricted	(13,150)	167,357	295,383	175,963	45,031	(76,367)	26,079
Temporarily Restricted	13,150	-	-	69,912	-	86,084	19,870
Permanently Restricted	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>-</u>	<u>167,357</u>	<u>295,383</u>	<u>245,875</u>	<u>45,031</u>	<u>9,717</u>	<u>45,949</u>
	<u>\$ 12,806</u>	<u>\$ 169,297</u>	<u>\$ 297,502</u>	<u>\$ 287,784</u>	<u>\$ 103,482</u>	<u>\$ 239,639</u>	<u>\$ 783,469</u>

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**AMikids, Inc. and Affiliates**  
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	AMikids Piedmont	AMikids Pinellas	AMikids Peninsula	AMikids Red River	AMikids Rio Grande Valley	AMikids Sandoval	AMikids Savannah River	AMikids Louisiana Properties	AMikids Southwest Florida
<b>Assets</b>									
Cash and Cash Equivalents	\$ 55,249	\$ 15,389	\$ -	\$ 30,169	\$ 13,318	\$ 70,276	\$ 3,655	\$ -	\$ 136,571
Investments	-	-	-	-	-	-	-	-	124,055
Accounts Receivable:									
Funding Agencies	4,972	-	-	25,022	26,823	-	-	-	-
Other, net	6,333	3,504	-	6,753	5,370	2,498	-	-	4,620
Prepaid Expenses and Other Assets	32,407	33,160	2,334	1,200	27,068	156,048	40,407	20,927	32,560
Assets Held for Sale	-	-	143,875	-	-	-	-	405,163	-
Due from Affiliates	102,667	34,317	-	-	47,968	265,036	7,433	511,400	66,590
Boat Inventory	-	-	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-	-	-
Property and Equipment, Net	145,618	125,264	-	380,841	67,737	295,700	106,792	1,625,154	148,758
	<u>\$ 347,246</u>	<u>\$ 211,634</u>	<u>\$ 146,209</u>	<u>\$ 443,985</u>	<u>\$ 188,284</u>	<u>\$ 789,558</u>	<u>\$ 158,287</u>	<u>\$ 2,562,644</u>	<u>\$ 513,154</u>
<b>Liabilities and Net Assets (Deficit)</b>									
<b>Liabilities:</b>									
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	24,277	14,369	-	20,254	18,633	35,542	6,406	-	16,901
Accrued Expenses	33,266	17,076	84,886	107,841	29,790	68,479	162,502	203	39,459
Accrued Pension	-	-	-	-	-	-	-	-	-
Due to Affiliates	23,157	29,409	58,989	505,979	1,448,567	943,655	436,768	578,122	27,490
Deferred Revenues	49,833	36,202	-	-	35,058	-	-	-	-
Security Deposits	-	-	2,500	-	-	-	-	-	-
Notes Payable	47,680	-	-	-	-	-	5,302	819,918	11,658
Total Liabilities	<u>178,213</u>	<u>97,056</u>	<u>146,375</u>	<u>634,074</u>	<u>1,532,048</u>	<u>1,047,676</u>	<u>610,978</u>	<u>1,398,243</u>	<u>95,508</u>
<b>Net Assets (Deficit):</b>									
Unrestricted	163,171	111,163	(166)	(195,861)	(1,374,115)	(263,118)	(538,816)	1,164,401	369,716
Temporarily Restricted	5,862	3,415	-	5,772	30,351	5,000	86,125	-	47,930
Permanently Restricted	-	-	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>169,033</u>	<u>114,578</u>	<u>(166)</u>	<u>(190,089)</u>	<u>(1,343,764)</u>	<u>(258,118)</u>	<u>(452,691)</u>	<u>1,164,401</u>	<u>417,646</u>
	<u>\$ 347,246</u>	<u>\$ 211,634</u>	<u>\$ 146,209</u>	<u>\$ 443,985</u>	<u>\$ 188,284</u>	<u>\$ 789,558</u>	<u>\$ 158,287</u>	<u>\$ 2,562,644</u>	<u>\$ 513,154</u>

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Schedule I

	AMikids Southwest Louisiana	AMikids Space Coast	AMikids Tallahassee	AMikids Tampa	AMikids Volusia	AMikids Virginia Wilderness	AMikids West Florida	AMikids WINGS South Florida
<b>Assets</b>								
Cash and Cash Equivalents	\$ 22,054	\$ 392,806	\$ 13,470	\$ 6,396	\$ 8,499	\$ 146,699	\$ 13,874	\$ 44,926
Investments	-	-	-	-	-	-	-	-
Accounts Receivable:								
Funding Agencies	3,383	33,663	-	-	-	294,949	39,420	140
Other, net	200	8,447	3,345	4,684	3,610	14,571	1,100	-
Prepaid Expenses and Other Assets	300	33,608	29,138	26,292	56,453	37,082	8,450	-
Assets Held for Sale	-	-	-	-	-	-	-	-
Due from Affiliates	1,275	95,372	55,068	35,040	51,962	-	9,694	84,431
Boat Inventory	-	-	-	-	-	-	-	-
Boats under Lease	-	-	-	-	-	-	-	-
Property and Equipment, Net	24,340	759,202	168,773	440,783	7,016	469,512	80,245	3,932
	<u>\$ 51,552</u>	<u>\$ 1,323,098</u>	<u>\$ 269,794</u>	<u>\$ 513,195</u>	<u>\$ 127,540</u>	<u>\$ 962,813</u>	<u>\$ 152,783</u>	<u>\$ 133,429</u>
<b>Liabilities and Net Assets (Deficit)</b>								
<b>Liabilities:</b>								
Lines of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts Payable	4,403	46,879	16,427	12,386	30,454	27,251	10,948	15,249
Accrued Expenses	37,248	37,643	27,614	48,095	25,924	54,013	52,266	11,241
Accrued Pension	-	-	-	-	-	-	-	-
Due to Affiliates	24,181	25,003	35,679	253,141	30,318	66,459	18,973	77,445
Deferred Revenues	11,124	31,120	25,191	68,403	-	36,877	14,796	-
Security Deposits	-	-	-	-	-	-	-	-
Notes Payable	-	-	-	5,216	-	36,788	-	-
Total Liabilities	<u>76,956</u>	<u>140,645</u>	<u>104,911</u>	<u>387,241</u>	<u>86,696</u>	<u>221,388</u>	<u>96,983</u>	<u>103,935</u>
<b>Net Assets (Deficit):</b>								
Unrestricted	(25,404)	1,084,145	164,048	111,063	40,844	741,425	50,551	29,494
Temporarily Restricted	-	98,308	835	14,891	-	-	5,249	-
Permanently Restricted	-	-	-	-	-	-	-	-
Total Net Assets (Deficit)	<u>(25,404)</u>	<u>1,182,453</u>	<u>164,883</u>	<u>125,954</u>	<u>40,844</u>	<u>741,425</u>	<u>55,800</u>	<u>29,494</u>
	<u>\$ 51,552</u>	<u>\$ 1,323,098</u>	<u>\$ 269,794</u>	<u>\$ 513,195</u>	<u>\$ 127,540</u>	<u>\$ 962,813</u>	<u>\$ 152,783</u>	<u>\$ 133,429</u>

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**Schedule I**

	AMikids WINGS Texas	AMikids Y.E.S.	Total	Eliminations	Total
<b>Assets</b>					
Cash and Cash Equivalents	\$ -	\$ 118,385	\$ 6,917,680	\$ -	\$ 6,917,680
Investments	-	395,649	8,255,320	-	8,255,320
Accounts Receivable:					
Funding Agencies	-	31,933	4,321,290	-	4,321,290
Other, net	-	4,649	667,035	-	667,035
Prepaid Expenses and Other Assets	125	27,838	2,195,043	(607,738)	1,587,305
Assets Held for Sale	322,610	-	2,051,295	-	2,051,295
Due from Affiliates	-	223,697	15,962,810	(15,962,810)	-
Boat Inventory	-	-	1,822,460	-	1,822,460
Boats under Lease	-	-	5,737,691	-	5,737,691
Property and Equipment, Net	-	63,789	11,530,303	-	11,530,303
	<u>\$ 322,735</u>	<u>\$ 865,940</u>	<u>\$ 59,460,927</u>	<u>\$ (16,570,548)</u>	<u>\$ 42,890,379</u>
<b>Liabilities and Net Assets (Deficit)</b>					
<b>Liabilities:</b>					
Lines of Credit	\$ -	\$ -	\$ 1,103,000	-	\$ 1,103,000
Accounts Payable	-	32,313	1,479,812	46	1,479,858
Accrued Expenses	-	53,448	13,655,281	(5,103,969)	8,551,312
Accrued Pension	-	-	-	2,898,863	2,898,863
Due to Affiliates	380,021	25,488	15,962,856	(15,962,856)	-
Deferred Revenues	-	28,350	654,091	-	654,091
Security Deposits	-	-	1,600,746	-	1,600,746
Notes Payable	-	-	2,448,489	-	2,448,489
Total Liabilities	<u>380,021</u>	<u>139,599</u>	<u>36,904,275</u>	<u>(18,167,916)</u>	<u>18,736,359</u>
<b>Net Assets (Deficit):</b>					
Unrestricted	(57,286)	673,651	20,249,907	1,597,368	21,847,275
Temporarily Restricted	-	52,690	2,249,655	-	2,249,655
Permanently Restricted	-	-	57,090	-	57,090
Total Net Assets (Deficit)	<u>(57,286)</u>	<u>726,341</u>	<u>22,556,652</u>	<u>1,597,368</u>	<u>24,154,020</u>
	<u>\$ 322,735</u>	<u>\$ 865,940</u>	<u>\$ 59,460,927</u>	<u>\$ (16,570,548)</u>	<u>\$ 42,890,379</u>

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**AMikids, Inc. and Affiliates**  
**Combining Schedule - Statement of Activities Information**  
**Year Ended June 30, 2013**

**Schedule II**

	AMikids	AMikids Acadiana	AMikids Foundation	AMikids Gainesville	AMikids Family Services	AMikids Baton Rouge	AMikids Baxley Wilderness	AMikids Bayou Region	AMikids Beaufort
<b>Public Support and revenue:</b>									
State support:									
Florida	\$ 1,834,043	\$ -	\$ -	\$ 431,209	\$ 1,073,105	\$ -	\$ -	\$ -	\$ -
South Carolina	1,196,008	-	-	-	-	-	-	-	1,053,727
Louisiana	201,397	1,367,607	-	-	-	-	-	-	-
Georgia	194,753	-	-	-	-	-	232,903	-	-
Texas	80,275	-	-	-	-	-	-	-	-
North Carolina	220,410	-	-	-	-	-	-	-	-
Federal Support	595,364	79,025	-	80,652	-	109,838	13,115	-	74,987
Regional Funds	-	113,234	-	172,044	-	530,161	117,225	-	27,475
Contributions	1,814,980	15,635	214,603	75,148	170	473,214	922	28,813	130,118
Total Public Support	6,137,230	1,575,501	214,603	759,053	1,073,275	1,113,213	364,165	28,813	1,286,307
<b>Revenue</b>									
Boat Program	4,763,821	-	-	-	-	-	-	-	-
Investment income	460,980	-	15,984	-	5,496	178	982	-	1,788
Other	2,592,759	4,106	-	112,913	-	1,640	506	317,176	48,668
Total revenue	7,817,560	4,106	15,984	112,913	5,496	1,818	1,488	317,176	50,456
Total public support and revenues	13,954,790	1,579,607	230,587	871,966	1,078,771	1,115,031	365,653	345,989	1,336,763
<b>Expenses</b>									
Program Services	-	1,768,369	-	868,193	972,232	1,209,021	821,419	415,949	1,386,664
Management and general	16,632,947	19,494	-	39,043	19,752	107,897	132,714	13,515	21,047
Fundraising	296,143	-	271,369	-	-	-	-	-	-
Boat Program	4,243,321	-	-	-	-	-	-	-	-
Total expenses	21,172,411	1,787,863	271,369	907,236	991,984	1,316,918	954,133	429,464	1,407,711
Change in net assets	(7,217,621)	(208,256)	(40,782)	(35,270)	86,787	(201,887)	(588,480)	(83,475)	(70,948)
Net assets (deficit), beginning of the year	20,496,342	(1,211,275)	992,972	(353,203)	444,567	613,618	608,605	83,475	936,679
Net assets (deficit), end of the year	\$ 13,278,721	\$ (1,419,531)	\$ 952,190	\$ (388,473)	\$ 531,354	\$ 411,731	\$ 20,125	\$ -	\$ 865,731

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**AMikids, Inc. and Affiliates**  
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**Schedule II**

	AMikids Big Cypress	AMikids Bennettsville	AMikids Sand Hills	AMikids White Pines	AMikids Alexandria	AMikids Polk	AMikids Donaldsonville	AMikids Crossroads	AMikids Miami Dade
<b>Public Support and revenue:</b>									
State support:									
Florida	\$ 1,119,775	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 159,461	\$ 1,384,205
South Carolina	-	1,242,911	1,254,886	1,237,632	-	-	-	-	-
Louisiana	-	-	-	-	152	-	-	-	-
Georgia	-	-	-	-	-	-	-	-	-
Texas	-	-	-	-	-	-	-	-	-
North Carolina	-	-	-	-	-	-	-	-	-
Federal Support	506,477	104,081	93,190	109,001	385	-	10,566	152,860	107,541
Regional Funds	216,885	-	1,115	331	17,170	118	165,523	407,066	746,437
Contributions	82,250	86,954	137,094	77,385	19,545	9,890	5,974	113,894	193,407
Total Public Support	1,925,387	1,433,946	1,486,285	1,424,349	37,252	10,008	182,063	833,281	2,431,590
<b>Revenue</b>									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	12	-	1	2	-	2	-	33,858	48
Other	9,071	16,062	8,642	12,018	423,017	7,086	677,399	264	8,506
Total revenue	9,083	16,062	8,643	12,020	423,017	7,088	677,399	34,122	8,554
Total public support and revenues	1,934,470	1,450,008	1,494,928	1,436,369	460,269	17,096	859,462	867,403	2,440,144
<b>Expenses</b>									
Program Services	1,986,059	1,637,781	1,562,351	1,523,047	196,757	4,864	364,721	1,264,117	2,688,093
Management and general	81,706	22,635	24,863	18,579	22,130	24,789	31,038	95,770	64,727
Fundraising	-	-	-	-	-	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	2,067,765	1,660,416	1,587,214	1,541,626	218,887	29,653	395,759	1,359,887	2,752,820
Change in net assets	(133,295)	(210,408)	(92,286)	(105,257)	241,382	(12,557)	463,703	(492,484)	(312,676)
Net assets (deficit), beginning of the year	(215,386)	(465,616)	(1,187)	(69,033)	(241,382)	12,557	(463,616)	899,187	619,205
Net assets (deficit), end of the year	\$ (348,681)	\$ (676,024)	\$ (93,473)	\$ (174,290)	\$ -	\$ -	\$ 87	\$ 406,703	\$ 306,529

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**AMikids, Inc. and Affiliates**  
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**Schedule II**

	AMikids Emerald Coast	AMikids Pensacola	AMikids Last Chance Ranch	AMikids Greater Ft. Lauderdale	AMikids Georgia	AMikids Georgetown	AMikids Manatee County	AMikids Sarasota County	Infinity Schools, Inc.
<b>Public Support and revenue:</b>									
State support:									
Florida	\$ 360,627	\$ 764,777	\$ 467,721	\$ 685,457	\$ -	\$ -	\$ -	\$ -	\$ -
South Carolina	-	-	-	-	-	1,116,403	-	-	-
Louisiana	-	-	-	-	-	-	-	-	-
Georgia	-	-	-	-	-	-	-	-	-
Texas	-	-	-	-	-	-	-	-	-
North Carolina	-	-	-	-	-	-	-	-	-
Federal Support	48,108	52,672	85,238	78,534	-	97,247	-	15,211	-
Regional Funds	191,976	325,008	51,985	356,246	-	807	291	73,851	325,980
Contributions	96,779	165,790	20,493	39,543	3,304	24,720	4,360	12,777	13,510
Total Public Support	697,490	1,308,247	625,437	1,159,780	3,304	1,239,177	4,651	101,839	339,490
<b>Revenue</b>									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	26	2,113	5	1,649	20	626	5	558	32
Other	7,611	80	285,336	2,451	-	90,879	99,408	-	-
Total revenue	7,637	2,193	285,341	4,100	20	91,505	99,413	558	32
Total public support and revenues	705,127	1,310,440	910,778	1,163,880	3,324	1,330,682	104,064	102,397	339,522
<b>Expenses</b>									
Program Services	689,329	1,277,404	882,581	1,422,879	-	1,346,721	32,296	218,652	414,312
Management and general	35,357	55,488	137,020	34,095	-	21,641	563,326	103,652	54,369
Fundraising	-	-	-	-	32,881	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	724,686	1,332,892	1,019,601	1,456,974	32,881	1,368,362	595,622	322,304	468,681
Change in net assets	(19,559)	(22,452)	(108,823)	(293,094)	(29,557)	(37,680)	(491,558)	(219,907)	(129,159)
Net assets (deficit), beginning of the year	(80,230)	389,898	116,857	497,725	265,412	542,195	479,790	281,910	149,313
Net assets (deficit), end of the year	\$ (99,789)	\$ 367,446	\$ 8,034	\$ 204,631	\$ 235,855	\$ 504,515	\$ (11,768)	\$ 62,003	\$ 20,154

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**AMIkids, Inc. and Affiliates**  
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**Schedule II**

	AMIkids Georgia Properties	AMIkids Infinity Chicago	AMIkids Infinity Wake County	AMIkids New Mexico Properties	AMIkids Infinity Marlboro	AMIkids Lafayette	AMIkids North Carolina Family Services	AMIkids Jacksonville	AMIkids Jefferson
Public Support and revenue:									
State support:									
Florida	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 574,611	\$ -
South Carolina	-	-	-	-	-	-	-	-	-
Louisiana	-	-	-	-	-	-	-	-	-
Georgia	-	-	-	-	-	-	-	-	-
Texas	-	-	-	-	-	-	-	-	-
North Carolina	-	-	-	-	-	-	1,248,989	-	-
Federal Support	-	(1,994)	-	-	-	-	-	28,229	15,187
Regional Funds	-	-	427,860	-	400,000	153,335	-	186,427	157,161
Contributions	-	3,140	535	-	47,465	-	2,200	230,045	230,945
Total Public Support	-	1,146	428,395	-	447,465	153,335	1,251,189	1,019,312	403,293
Revenue									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	10	16	27	3,158	14	-	-	366	-
Other	22,500	21,765	-	-	12,707	-	13	228	1,555,296
Total revenue	22,510	21,781	27	3,158	12,721	-	13	594	1,555,296
Total public support and revenues	22,510	22,927	428,422	3,158	460,186	153,335	1,251,202	1,019,906	1,958,589
Expenses									
Program Services	121,690	25,081	422,885	2,457	447,179	102,730	1,232,999	1,036,389	773,933
Management and general	399	9,526	71,315	354	66,700	24,650	18,312	35,620	254,043
Fundraising	-	-	-	-	-	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	122,089	34,607	494,200	2,811	513,879	127,380	1,251,311	1,072,009	1,027,976
Change in net assets	(99,579)	(11,680)	(65,778)	347	(53,693)	25,955	(109)	(52,103)	930,613
Net assets (deficit), beginning of the year	2,664,396	11,680	70,116	755,375	24,692	-	357,383	509,494	(888,883)
Net assets (deficit), end of the year	\$ 2,564,817	\$ -	\$ 4,338	\$ 755,722	\$ (29,001)	\$ 25,955	\$ 357,274	\$ 457,391	\$ 41,730

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**AMikids, Inc. and Affiliates**  
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**Schedule II**

	AMikids Graduate School	AMikids Middle Georgia	South Carolina Wilderness Institute	AMikids Pasco	AMikids Norfolk	AMikids Northeast Louisiana	AMikids Orlando	AMikids Palm Beach	AMikids Panama City Marine Institute
<b>Public Support and revenue:</b>									
State support:									
Florida	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 376,375	\$ -	\$ 657,914
South Carolina	-	-	-	-	-	-	-	-	-
Louisiana	-	-	-	-	-	-	-	-	-
Georgia	-	164,726	-	-	-	-	-	-	-
Texas	-	-	-	-	-	-	-	-	-
North Carolina	-	-	-	-	-	-	-	-	-
Federal Support	-	10,853	-	33,643	6,985	4,061	34,345	3,087	76,206
Regional Funds	-	128,474	-	141,322	97,188	-	334,900	-	688,437
Contributions	300	328	-	283,853	4,762	535	90,545	2,454	73,002
Total Public Support	300	304,381	-	458,818	108,935	4,596	836,165	5,541	1,495,559
<b>Revenue</b>									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	30	1,520	-	1,426	13	9	71	8	2
Other	-	5,500	-	-	897,476	4,700	4,590	788,718	66,811
Total revenue	30	7,020	-	1,426	897,489	4,709	4,661	788,726	66,813
Total public support and revenues	330	311,401	-	460,244	1,006,424	9,305	840,826	794,267	1,562,372
<b>Expenses</b>									
Program Services	397,000	782,389	-	572,048	330,427	221,781	892,145	61,250	1,468,265
Management and general	3,494	203,642	614	65,154	66,386	44,961	36,341	743,620	369,961
Fundraising	-	-	-	-	-	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	400,494	986,031	614	637,202	396,813	266,742	928,486	804,870	1,838,226
Change in net assets	(400,164)	(674,630)	(614)	(176,958)	609,611	(257,437)	(87,660)	(10,603)	(275,854)
Net assets (deficit), beginning of the year	400,164	841,987	295,997	422,833	(609,611)	302,468	97,377	10,603	321,803
Net assets (deficit), end of the year	\$ -	\$ 167,357	\$ 295,383	\$ 245,875	\$ -	\$ 45,031	\$ 9,717	\$ -	\$ 45,949

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**AMikids, Inc. and Affiliates**  
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**Schedule II**

	AMikids Piedmont	AMikids Pinellas	AMikids Peninsula	AMikids Red River	AMikids Rio Grande Valley	AMikids Sandoval	AMikids Savannah River	AMikids Louisiana Properties	AMikids Southwest Florida
Public Support and revenue:									
State support:									
Florida	\$ -	\$ 334,719	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 570,681
South Carolina	1,116,402	-	-	-	-	-	-	-	-
Louisiana	-	-	-	-	-	-	-	-	-
Georgia	-	-	-	-	-	-	705,977	-	-
Texas	-	-	-	-	454,891	-	-	-	-
North Carolina	-	-	-	-	-	-	-	-	-
Federal Support	67,353	29,674	-	48,235	53,486	2,818,962	12,906	-	29,140
Regional Funds	3,500	144,282	-	348,016	227,037	-	-	-	270,273
Contributions	28,287	119,860	-	69,279	21,268	24,799	105,183	5,163	87,472
Total Public Support	1,215,542	628,535	-	465,530	756,682	2,843,761	824,066	5,163	957,566
Revenue									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	3	128	-	54	1	-	123	10,636	(20,285)
Other	9,528	27,884	211,600	2,440	5,024	115	19,642	324,288	178
Total revenue	9,531	28,012	211,600	2,494	5,025	115	19,765	334,924	(20,107)
Total public support and revenues	1,225,073	656,547	211,600	468,024	761,707	2,843,876	843,831	340,087	937,459
Expenses									
Program Services	1,184,328	834,780	-	965,368	1,015,324	2,392,989	1,616,950	243,172	1,047,598
Management and general	24,704	35,022	194,454	98,993	56,454	39,244	20,244	109,354	28,393
Fundraising	-	-	-	-	-	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	1,209,032	869,802	194,454	1,064,361	1,071,778	2,432,233	1,637,194	352,526	1,075,991
Change in net assets	16,041	(213,255)	17,146	(596,337)	(310,071)	411,643	(793,363)	(12,439)	(138,532)
Net assets (deficit), beginning of the year	152,992	327,833	(17,312)	406,248	(1,033,693)	(669,761)	340,672	1,176,840	556,178
Net assets (deficit), end of the year	\$ 169,033	\$ 114,578	\$ (166)	\$ (190,089)	\$ (1,343,764)	\$ (258,118)	\$ (452,691)	\$ 1,164,401	\$ 417,646

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**Schedule II**

	AMikids Southwest Louisiana	AMikids Space Coast	AMikids Tallahassee	AMikids Tampa	AMikids Volusia	AMikids Virginia Wilderness	AMikids West Florida	AMikids WINGS South Florida	AMikids WINGS Texas
Public Support and revenue:									
State support:									
Florida	\$ -	\$ 1,009,815	\$ 588,209	\$ 313,486	\$ 617,281	\$ -	\$ -	\$ 1,001,216	\$ -
South Carolina	-	-	-	-	-	-	-	-	-
Louisiana	-	-	-	-	-	-	-	-	-
Georgia	-	-	-	-	-	-	-	-	-
Texas	-	-	-	-	-	-	-	-	-
North Carolina	-	-	-	-	-	-	-	-	-
Federal Support	51,732	60,111	55,743	25,168	39,496	557,498	65,170	198,050	-
Regional Funds	414,669	242,495	165,567	98,060	183,798	1,336,624	271,189	713	-
Contributions	16,155	76,899	57,354	103,582	18,074	20,907	7,984	26,352	-
Total Public Support	482,556	1,389,320	866,873	540,296	858,649	1,915,029	344,343	1,226,331	-
Revenue									
Boat Program	-	-	-	-	-	-	-	-	-
Investment income	29	174	-	-	-	2	1	21	-
Other	651,020	126,592	21,915	38,017	-	1,501	1,396,818	2,376,931	7,600
Total revenue	651,049	126,766	21,915	38,017	-	1,503	1,396,819	2,376,952	7,600
Total public support and revenues	1,133,605	1,516,086	888,788	578,313	858,649	1,916,532	1,741,162	3,603,283	7,600
Expenses									
Program Services	722,022	1,456,157	966,536	773,341	846,380	1,532,093	895,509	1,836,213	3,034
Management and general	88,413	37,897	43,119	35,718	28,373	317,889	83,561	68,717	38,680
Fundraising	-	-	-	-	-	-	-	-	-
Boat Program	-	-	-	-	-	-	-	-	-
Total expenses	810,435	1,494,054	1,009,655	809,059	874,753	1,849,982	979,070	1,904,930	41,714
Change in net assets	323,170	22,032	(120,867)	(230,746)	(16,104)	66,550	762,092	1,698,353	(34,114)
Net assets (deficit), beginning of the year	(348,574)	1,160,421	285,750	356,700	56,948	674,875	(706,292)	(1,668,859)	(23,172)
Net assets (deficit), end of the year	\$ (25,404)	\$ 1,182,453	\$ 164,883	\$ 125,954	\$ 40,844	\$ 741,425	\$ 55,800	\$ 29,494	\$ (57,286)

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**AMikids, Inc. and Affiliates**  
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	AMikids Y.E.S.	Total	Eliminations	Total
<b>Public Support and revenue:</b>				
State support:				
Florida	\$ 933,757	\$ 15,258,444	\$ -	\$ 15,258,444
South Carolina	-	8,217,969	-	8,217,969
Louisiana	-	1,569,156	-	1,569,156
Georgia	-	1,298,359	-	1,298,359
Texas	-	535,166	-	535,166
North Carolina	-	1,469,399	-	1,469,399
Federal Support	471,598	7,209,016	-	7,209,016
Regional Funds	160,899	10,423,154	-	10,423,154
Contributions	32,221	5,652,220	(1,769,305)	3,882,915
Total Public Support	<u>1,598,475</u>	<u>51,632,883</u>	<u>(1,769,305)</u>	<u>49,863,578</u>
<b>Revenue</b>				
Boat Program	-	4,763,821	-	4,763,821
Investment income	69,811	591,733	(299,505)	292,228
Other	-	13,326,995	(11,638,136)	1,688,859
Total revenue	<u>69,811</u>	<u>18,682,549</u>	<u>(11,937,641)</u>	<u>6,744,908</u>
Total public support and revenues	<u>1,668,286</u>	<u>70,315,432</u>	<u>(13,706,946)</u>	<u>56,608,486</u>
<b>Expenses</b>				
Program Services	1,623,833	53,800,086	(2,143,792)	51,656,294
Management and general	81,100	21,823,015	(11,797,887)	10,025,128
Fundraising	-	600,393	(278,620)	321,773
Boat Program	-	4,243,321	-	4,243,321
Total expenses	<u>1,704,933</u>	<u>80,466,815</u>	<u>(14,220,299)</u>	<u>66,246,516</u>
Change in net assets	<u>(36,647)</u>	<u>(10,151,383)</u>	<u>513,353</u>	<u>(9,638,030)</u>
Net assets (deficit), beginning of the year	<u>762,988</u>	<u>32,708,035</u>	<u>1,084,015</u>	<u>33,792,050</u>
Net assets (deficit), end of the year	<u>\$ 726,341</u>	<u>\$ 22,556,652</u>	<u>\$ 1,597,368</u>	<u>\$ 24,154,020</u>

See Independent Auditors' Report on Supplemental Information

## Schedule III

## Public Support and Revenue Information

## For the Year Ended June 30, 2013

	State	School Districts	Federal Support	United Way	Other Local Grants	Contributions	Boat Program	Other	Combined Support & Revenue
Florida	\$ 15,258,444	\$ 4,580,449	\$ 2,383,321	\$ 368,638	\$ 807,160	\$ 4,067,292	\$ 4,763,821	\$ 3,500,878	\$ 35,730,003
Georgia	1,298,359	245,699	36,874	-	-	109,737	-	50,804	1,741,473
Illinois	-	-	(1,994)	-	-	3,140	-	10,064	11,210
Louisiana	1,569,156	1,725,432	319,030	69,500	104,338	865,556	-	363,760	5,016,772
New Mexico	-	-	3,307,957	-	-	24,799	-	3,273	3,336,029
North Carolina	1,469,399	427,860	-	-	-	2,735	-	40	1,900,034
South Carolina	8,217,969	400,000	545,859	33,228	-	532,024	-	200,934	9,930,014
Texas	535,166	-	53,486	-	227,037	21,268	-	12,625	849,582
Virginia	-	-	564,483	-	1,433,813	25,669	-	121,186	2,145,151
	28,348,493	7,379,440	7,209,016	471,366	2,572,348	5,652,220	4,763,821	4,263,564	60,660,268
Less Intercompany Revenue <sup>1</sup>	-	-	-	-	-	(1,769,305)	-	(2,282,477)	(4,051,782)
Total Public Support & Revenue	<u>\$ 28,348,493</u>	<u>\$ 7,379,440</u>	<u>\$ 7,209,016</u>	<u>\$ 471,366</u>	<u>\$ 2,572,348</u>	<u>\$ 3,882,915</u>	<u>\$ 4,763,821</u>	<u>\$ 1,981,087</u>	<u>\$ 56,608,486</u>

## For the Year Ended June 30, 2012

	State	School Districts	Federal Support	United Way	Other Local Grants	Contributions	Boat Program	Other	Combined Support & Revenue
Florida	\$ 20,097,838	\$ 6,987,129	\$ 3,647,273	\$ 474,895	\$ 233,747	\$ 2,291,164	\$ 5,318,166	\$ 2,105,544	\$ 41,155,756
Georgia	5,717,303	495,071	169,993	-	-	193,666	-	38,408	6,614,441
Illinois	-	1,024,393	20,600	-	-	11,973	-	132	1,057,098
Louisiana	5,204,079	1,565,943	2,882,403	65,000	37,589	95,293	-	376,495	10,226,802
New Mexico	-	-	2,083,524	-	-	777,476	-	3,747	2,864,747
North Carolina	1,316,050	427,860	-	-	-	305	-	70	1,744,285
South Carolina	8,217,944	400,000	553,504	28,713	-	543,232	-	123,467	9,866,860
Texas	597,613	-	51,671	-	159,642	14,926	-	10,776	834,628
Virginia	-	250,000	585,124	-	1,361,454	23,796	-	45,770	2,266,144
	41,150,827	11,150,396	9,994,092	568,608	1,792,432	3,951,831	5,318,166	2,704,409	76,630,761
Less Intercompany Revenue <sup>2</sup>	-	-	-	-	-	(1,944,625)	-	(1,844,331)	(3,788,956)
Total Public Support & Revenue	<u>\$ 41,150,827</u>	<u>\$ 11,150,396</u>	<u>\$ 9,994,092</u>	<u>\$ 568,608</u>	<u>\$ 1,792,432</u>	<u>\$ 2,007,206</u>	<u>\$ 5,318,166</u>	<u>\$ 860,078</u>	<u>\$ 72,841,805</u>

<sup>1</sup>Excludes AMIkids Inc closure gains and affiliate debt forgiveness of \$9 million and \$8.7 million, respectively, which are eliminated within the Other category.<sup>2</sup>Excludes affiliate debt forgiveness of \$1.8 million, which are eliminated within the Other category.

See Independent Auditors' Report on Supplemental Information



## B. Administrative and Financial Capability

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### 2. Staff Capability

#### Detailed Staffing for AMKids Georgetown Marine Institute

AMKids Georgetown Marine Institute provides for 24 hour awake supervision, 365 days a year meeting and/or **exceeding the required staffing of 1 staff to every 8 youth awake; 1 staff to every 10 youth during sleep with 2 direct care staff in each cottage; and 1 HSP to every 16 youth**. Schedules are developed and posted for all staff for coverage to ensure proper ratios at all times including emergencies and sick leave.

#### Recruitment

AMKids has designed and implemented hiring practices to identify, recruit and hire a qualified diverse staff that embodies the organizational values. AMKids Human Resources department posts all open positions internally to expedite hiring of qualified and trained individuals. As a service to AMKids Georgetown Marine Institute, AMKids, Inc. provides the following to ensure highly qualified and appropriate staff for all open, required and budgeted positions:

- 1) Post positions internally and externally
- 2) National Directors of MH & Education Services review resume submissions for degree and licensure qualifications/experience (Mental Health, Education and Leadership positions may apply).
- 3) Best candidates are invited for a face-to-face on-site interview. Interview consists of a combination of position specific and AMKids interview questions
- 4) National and Regional Directors recommend candidates for hire (for leadership positions). Those candidates meet with the facility Executive Director (if employed at the time) to ensure all leadership are in agreement regarding final decisions.
- 5) Job offers are made contingent upon background screening, reference checks, degree confirmation, licensure confirmation, etc.

#### Collection and Maintenance of Documentation of Current Licenses, Certifications, Qualifications and Experience

Prior to employment, all potential employees go through a rigorous screening process to include, but is not limited to:

- Background Screening with an **Eligible** rating **prior** to employment or access to youth
- A driver's license check **prior** to employment and/or access to youth: *employees with more than two moving violations in the last three years or a DUI/DWI within the last seven years are prohibited from operating institute vehicles or transporting students under any circumstances.*



- Drug screening
- License, certification, education and experience qualification check
- Reference check
- Sexual offender check

### **Hiring and Training**

All new employees meeting the criteria and being offered employment at AMKids Georgetown Marine Institute complete new hire paperwork and work documents including signing the job description and the AMKids Employee Handbook acknowledgement. The Handbook explains expected professionalism, code of conduct, and rules and policies an employee must adhere.

All staff members currently employed at AMKids Georgetown Marine Institute hold the required degree, experience and background required to perform the services and tasks associated with the current contract as well as the requirements of the RFP. Any new employees hired will also be required to meet and/or exceed the requirements set forth by their job descriptions, contract requirements and/or State Standards.

AMKids Georgetown Marine Institute employs a rigorous, comprehensive staff training program to ensure all team members are trained to provide services to the youth, community and stakeholders with excellence.

### **Staff Training and Development**

AMKids Georgetown Marine Institute maintains employees' training files, schedules required training with internal and external resources, and ensures contractual established pre-service and annual training standards are adhered. AMKids, Inc. assists the programs with development of New Hire and Annual Training Plans and with scheduling trainings to ensure compliance with Evidence Based Practices and Department requirements and offers employees opportunities during annual departmental conferences (Mental Health, Leadership, Education, etc.) as well as synchronous trainings available throughout the year.

Each year, an annual training calendar is developed and made available to all staff members identifying specific training topics and dates. Supervisory staff, as part of their annual hours of required in-service training, will complete training in areas of management, leadership, personal accountability, employee relations, communications or fiscal training through AMKids supervisory meetings and online trainings. AMKids, Inc. manages an online training calendar on the AMKids Intranet Site along with Moodle interactive, web-based trainings that are available to all team members. Although each program is responsible for their own training needs, as a service to the programs, AMKids, Inc. employs a National Director of Training and Leadership Development to assist the programs and **exceed** Department requirements in the area of training and retention, schedule needed trainings, research new opportunities, develop new leaders, and create specific trainings based on program and organization needs. This position is also responsible for maintaining and updating the AMKids Intranet Training Site and Moodle trainings.



### **Competency and Leadership Development Process**

In addition to the required contractual and AMIkids training, staff engages in a competency development process, an individualized training plan focused on the job specific skills the staff member needs to be successful. Position specific Competency Sets are comprised of the interpersonal, leadership, contextual and technical skills an individual needs to do their respective job at a high level.

For all mid-level managers or those in supervisory roles, AMIkids, Inc. developed the AMIkids Leadership University (ALU). The ALU focuses on developing supervisory leadership skills as well as basic management training. The participants receive training that provides them with the tools they need to be more effective in their current role and prepare them for future leadership positions within AMIkids. The face-to-face, web-based and conference call training sessions over the course of 12 weeks (Intro ALU Seminar, Regional Cohort Workshop, ALU Success Seminar) are designed around current trends, needs, and best practices in Juvenile Justice, Mental Health and Education. The managers are assigned to a cohort with designated senior Executive Directors who provide coaching and mentoring throughout the process. In addition to the standard foundation training topics, managers participate in individualized training topics/assignments based on a 360 Competency Evaluation Assessment and performance observations. Trainings are a combination of live seminars and on-demand courses via eLearning. Employee participation is tracked by the Human Resources and Training Departments of AMIkids, Inc. Participants continue their individualized training over the course of 1 year to ensure competency.

### **Delivery of Training**

AMIkids Georgetown Marine Institute staff members receive training through the following mechanisms:

- **Instructor Led:** AMIkids, Inc. holds trainings throughout the year to include topics such as Crisis Training and First Aid/CPR/AED, Evidence Based trainings, conferences, etc. AMIkids Georgetown Marine Institute ensures in house instructor led trainings are held in accordance with requirements and standards set forth by AMIkids, Inc. and stakeholders.
- **Individualized Instruction Workbooks:** Staff has access to a series of workbooks for AMIkids required training. The workbooks are designed to be self-study.
- **AMIkids Professional Development Website:** Staff has access to on-line training in a variety of AMIkids required and optional training through the web on the AMIkids Intranet, Professional Development Website and Moodle.
- **AMIkids Synchronous Training:** AMIkids provides numerous training events throughout the year through video conferencing, web chats, face-to-face meetings, etc.

## Retention

AMKids Georgetown Marine Institute recognizes that staff retention is critical to ensure continuity of excellent services but also to allow for the development of meaningful relationships between staff and youth. In an effort to increase staff retention, the following strategies are employed:

- *Competency Development Planning:* to ensure team members are adequately prepared for the job, an assessment of their job related competencies is required. Identified strengths that are critical to job performance are prioritized and an individualized competency development plan is created. By ensuring that a team member has the required skills to perform the job, we hope to decrease job frustration and thereby increase retention.
- *Continuous Coaching and Feedback:* Supervisors provide continual feedback on competency development. The supervisor reviews the staff's development plan at regular intervals and provides continual coaching, training, and feedback which impacts retention by ensuring success and minimizing negative staff/supervisor interactions.
- *Access Leadership:* AMKids employs an "open door" policy where all are involved in strategic planning and can discuss issues and concerns without fear of reprisal.
- *Competitive Salary and Benefits Package:* affordable healthcare, dental and vision plans, life insurance plans, Paid Time off (PTO) hours (sick, vacation and holiday), sabbatical options, short term disability benefits, pension and 403B plans, as well as numerous training and advancement opportunities.
- *Advancement Opportunities:* With different models in several states, AMKids has many opportunities for employees to move, gain new experiences and be promoted. AMKids also provides additional training and leadership opportunities like "Kids First University", online training modules, and job specific training. Employees in leadership roles or interested in becoming a leader in the organization will be invited to participate in the AMKids Leadership University where we will help the employees realize their current skills and develop needed skills to be an effective leader.
- At AMKids we believe in developing a *family atmosphere* for our youth and staff in order to ensure a positive working environment. Our team members become extended family members and we care for them as such.
- *Recognition* for years of service, successes and efforts. Employees are rewarded for years of service in 5 year intervals; are incented and recognized for service above and beyond; rewarded for improvement initiatives and meeting or exceeding expected outcomes; recognized for being a leader in exemplifying the organization's mission and



values and for being a leader in their particular discipline (Executive Director of the Year, Educator of the Year, etc.).

### Staffing Levels

The AMikids structure and organizational chart allows for AMikids Georgetown Marine Institute to meet or **exceed** the required direct care staff members on each shift. This allows for coverage for vacation time, sick time, leave, as well as student trips and off-site activities. In addition, AMikids Georgetown Marine Institute also ensures *all* team members are trained in all Department requirements to be considered “direct care” and all team members cross train with other departments to ensure coverage in emergencies.

In order to meet the staffing ratio and delivery of services, AMikids will ensure staffing of the following:

- **Executive Director** – the Executive Director (ED) is responsible for comprehensive administration of program operations, academic programming, treatment programs, behavior modification, and individual case management. The ED functions as chief program administrator to oversee all components of the APGM<sup>®</sup>, other evidence-based practices, and program services. The ED ensures compliance with all applicable local, state and federal regulatory and contract requirements. The ED’s work includes implementing fundraising initiatives, overseeing financial resources, securing and maintaining relationships with community partners and managing the program budget. The ED is accountable to national management and the local Board of Trustees. The ED will have at a minimum, a Bachelor’s Degree, four (4) years professional experience in a youth rehabilitation or residential facility, four (4) years supervisory/administrative responsibilities or equivalent. *Minimum Education/Training/Experience for an Executive Director includes: a Bachelor’s Degree, supplemented by four (4) years professional experience in a children’s rehabilitation or residential facility to include supervisory/administrative responsibility or any combination of education, training and experience equal to or greater than defined regulatory requirements – OR – a Bachelor’s Degree in Social Work, Psychology, Counseling or Administration, supplemented by three (3) years’ experience working with children to include supervisory/administrative responsibility or any combination of education, training and experience equal to or greater than defined regulatory requirements – OR – Master’s Degree in Social Work, Psychology, Counseling or Administration or related field, supplemented by two (2) years professional experience working with children to include supervisory/administrative responsibility or any combination of education, training and experience equal to or greater than defined regulatory requirements – OR – an individual who is in the process of obtaining a degree and supplemented by ten (10) years professional experience in a children’s rehabilitation or residential facility to include supervisory/administrative responsibility.*
- **Director of Treatment** – The Director of Treatment has full accountability to the program’s executive director for ensuring the appropriate coordination and

implementation of mental health and substance abuse services. In this role, the DT also provides direct oversight for all mental health and substance clinical staff, and works closely with the AMKids Regional Director of Mental Health Services and Compliance to ensure quality service provision. The Director of Treatment is responsible for the development, implementation and general oversight of assigned treatment services, including assessments related to treatment needs, treatment plans, and treatment and intervention referrals. Treatment service may or may not include case management services. The DT provides group, individual, family and crisis counseling services to youth and their families affiliated with the program. The DT oversees work performed by program staff (where applicable) such as Clinical Staff, Behavior Modification Specialist, counselors and may or may not supervise Case Management Staff. The Director of Treatment serves as the DMHA as assigned by the Executive Director. *Minimum Qualifications/Experience: Master's degree plus State licensure as a psychologist or a mental health counselor, clinical social worker, or marriage and family therapist licensed. This position will serve as the Designated Mental Health Authority and ensure full compliance with the State Standards and contract requirements.*

- **Director of Education** – The Director of Education (DE) is responsible for the development, implementation and supervision of academic programming, policies and procedures. The DE functions to ensure quality learning services are provided through professional development and effective classroom management skills of instructional staff. The DE is responsible for developing and maintaining positive relationships with school district contract managers and professionals. The DE executes all education components of the AMKids Personal Growth Model® (APGM®), and ensures compliance with all applicable local, state, and federal regulatory and contractual requirements governing academic programs. The DE ensures all education staff is appropriately trained and certified, and assists the Executive Director/Principal in development and implementation of program policies and procedures. *The Minimum Education/ Training/Experience for a Director of Education includes: Master's Degree in Education Leadership or closely related field, supplemented by two (2) years professional experience working with children to include supervisory/administrative responsibility any combination of education, training and experience equal to or greater than defined regulatory requirements.*
- **Shift Supervisors** – The Shift Supervisor provides effective leadership to motivate and guide staff and students toward the successful accomplishment of established program goals and objectives. The Shift Supervisor functions to create a successful work environment and positive learning atmosphere through collaboration in all components of the APGM®. *The Minimum Education/Training/Experience for a Shift Supervisor includes: High School/GED, with one to two years of experience working with youth - preferably within the juvenile justice system; Associates or Bachelor's degree highly desirable.*



- **Direct Care Staff** – The Direct Care staff is responsible for directing and safely supervising students during activities. The staff accepts instructions from the DO and/or Shift Supervisor. The Direct Care staff's main concern includes the safety and supervision of our youth. *The Minimum Education/ Training/Experience includes: High School Diploma or GED; supplemented by one (1) to two (2) years related experience – OR – any equivalent combination of education, training and/or experience.*
- **Food Service Worker(s)** - Responsible for teaching and safely conduct the planning, preparation, and serving of Institute meals. The Food Service Worker will safely supervise students under instruction in quality menu planning, food preparation, waste disposing, recycling and serving standards. In addition, as a staff member, the Food Service Worker will maintain production records, inventories, contract audit documentation and equipment, supply, maintenance logs. The Food Service Worker's main concern includes the safety, supervision, counseling, and role modeling for our students. *The minimum education, training and experience for these positions are: High School Diploma or GED and 1 to 2 years related experience. ServSafe certification preferred.*
- **HSP** - The Human Services Professional (HSP) is responsible for evaluating, assessing and caring for students who are receiving Residential Intermediate Group Care services. Responsibilities involve facilitating the case management process which includes evaluating student needs and ensuring the timely delivery of appropriate program services to meet behavioral, psychological and psychosocial development and progress with established goals in each student's Individual Care Plan (ICP). The HSP also serves as a liaison between the parents and the Program and between the appropriate State Agency and the Program. *The minimum education, training and experience for this position is: Bachelor's degree in Psychology, Social Work, or other counseling related fields from an accredited educational institution, Master's degree preferred; Minimum of three (3) years related experience and/or training; or equivalent combination of education and experience.*
- **Business Manager** – The Business Manager assists the ED in administration with various program functions, e.g., personnel management, financial management, board relations, and fundraising. The BM maintains confidentiality of sensitive information, facilitates efficient program operations, and assists in creating an effective work environment. The Business Manager may supervise entry level support staff. *The Minimum Education/Training/Experience for the Business Manager includes: a High School Diploma/GED plus a minimum of 4 years' experience as an administrative assistant, preferably as an executive assistant or office manager, and experience in bookkeeping or other budget management experience – OR – an Associate's Degree plus a minimum of 2 years' experience as an administrative assistant, preferably as an executive assistant or office manager, and experience in bookkeeping or other budget management experience – OR – Bachelor's Degree in Business Administration, Education or related field.*

- **Certified Teacher**– The Teacher serves in the instruction and guidance of students within the appropriate grade or academic level. The Teacher is responsible for adhering to recognized curriculum standards, and compliance with instructional guidelines as defined by the local School District and educational systems. The Teacher performs all work as outlined in the educational component of the AMIkids Personal Growth Model© (APGM©). Work includes course delivery, administration of tests (or equivalent course criteria), and the tabulation and submission of students' final course grades. The *Minimum Education/Training/Experience for a teacher includes: Bachelor's Degree in Education, the academic discipline being delivered, or related field, supplemented by a demonstrated aptitude for working with at risk and troubled youth – OR – any combination of education, training and experience equal to or greater than defined regulatory requirements. All teachers must possess and maintain current teaching certification, and all necessary academic certifications; NCLB highly qualified designation preferred for the discipline being delivered.*

Georgetown Marine Institute has been operated by AMIkids since 1989. AMIkids Georgetown Marine Institute currently employs all qualified and trained staff needed to meet and/or exceed the terms of the current RFP and State Standard Requirements. A copy of the proposed organizational chart as well as current leadership staff resumes are attached.

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Executive Director

Position Code: EXECDIR  
FLSA Status: Exempt

Department: Operations  
Reports to: Regional Director

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**General Description of Duties**

The Executive Director is responsible for comprehensive administration of program operations, academic programming, treatment programs, behavior modification and individual case management. Employee functions as chief program administrator to oversee all components of the Personal Growth Model (PGM) and Evidence Based Practices. Position ensures compliance with all applicable local, State and Federal regulatory requirements governing non-profit education and treatment programs. Work includes implementing fundraising initiatives, overseeing financial resources, securing and maintaining relationships with community agencies and managing program budget.

Primary objective is the realization of AMikids' mission to provide a safe and successful learning environment for troubled youth, while encouraging social and emotional development through the achievement of academic and personal goals.

**Essential Job Functions as they relate to Core Competencies**

Establishes effective Interpersonal skills to encourage positive cooperation in the work place, with community partners and increase team success through meaningful interactions with youth; advises team members in developing effective communication skills with youth, families and community partners.

- Develops respectful, trusting and enthusiastic work environment to encourage innovative problem solving and creative program development; enforces the principles of professional conduct ethics, and AMikids values.
- Maintains open communication for the development of effective working relationships with all levels of staff and colleagues, as well as external agencies and professionals; develops and maintains community relations and effective key customer and contractor contacts.
- Plans and conducts regular staff meetings and interactive training to develop open communication and for the dissemination of information, e.g., problem resolution, policy interpretation, procedural changes.
- Develops effective working relationships with AMikids corporate office, AMikids programs, community partners, local Board of Trustees, and regulatory agencies; develops positive community relations; engages in various public speaking forums.

Provides effective Leadership to motivate and guide staff toward the successful accomplishment of established organization goals and objectives; creates a successful work environment and positive learning atmosphere.

- Coordinates and integrates all components youth development services within the AMikids Personal Growth Model and Evidence Based Practices.
- Develops and implements policies and procedures of the assigned program; plans, organizes and directs program goals and objectives; executes all activities toward the achievement of established AMikids goals and objectives; plans and directs program operations in fulfilling the goals and objectives of local Board of Trustees initiatives.
- Establishes policies and procedures to provide leadership and control in the event of a crisis.
- Practices effective organization, time management, and project management skills to ensure practical and efficient administration of program operations; ensures timely processing of administrative functions.
- Directs and oversees employee scheduling, time management and organization to ensure proper youth to staff ratios, youth supervision in the community, and to avoid the co-mingling of youth at different risk levels.

## Executive Director

- Develops partnerships with and maintains contacts with key individuals of state job services, the youth services department, local school systems, mental health and health providers, vocational programs and service providers in the district; serves as liaison for the Institute to; submits required reports and documentation; acts as liaison between AMIkids corporate office, AMIkids institutes and programs, and regulatory agencies; develops positive school/community relations with industry contacts.

Directs the coordination and implementation of Treatment programs; oversees delivery of appropriate youth diagnosis and treatment by qualified staff in the achievement of favorable therapeutic outcomes; enforces health, mental health and medication policies and procedures.

- Oversees youth evaluation and treatment plans to ensure programs are individualized and meet the needs of each youth.
- Ensures treatment components are consistently implemented with integrity and fidelity; participates in treatment review meetings as necessary.

Directs the coordination and implementation of Behavior Modification programs; oversees youth development initiatives to produce socially significant outcomes.

- Oversees the development, implementation, and evaluation of behavior analysis and youth interventions to encourage social and emotional development.
- Establishes guidelines for desirable youth conduct and disciplinary policies and procedures; prevents and intervenes in youth altercations and incidents; leads and/or participates in positive reinforcement, interdisciplinary and/or care review meetings.

Directs the development and implementation of the academic program to optimize educational opportunities and promote intellectual development of each youth.

- Oversees instructional administrative processes, e.g., teaching qualification and certification requirements, curriculum and testing compliance, master teaching schedule, and appropriate use of distance or virtual learning curriculum.
- Encourages the development of creative learning environments and teaching methods to facilitate student involvement and success.
- Reviews staff assessments of students in their academic and social environments; ensures individualized academic services are provided for each youth, e.g., Individualized Education Plans (IEPs), Individual Academic Plans (IAP).

Manages Human Resource functions, the development of personnel through training, professional developmental activities, the principles of professional conduct and ethics, and AMIkids values.

- Participates in recruiting, screening, hiring and training program personnel; supervises and evaluates the performance of professional, administrative and operational staff.
- Ensures all appropriate certifications, licensing and educational requirements are maintained and in compliance with all applicable regulatory standards.

Administers a Risk Management program for the local program to ensure safe and successful working and learning conditions are provided.

- Investigates and implements policy and procedural changes to reduce organizational liability and financial risk, e.g., general and professional liability, employment liability, youth and staff safety liabilities, employee misconduct, workers compensation claims, property and vehicle insurance claims.
- Ensures operational, administrative and reporting compliance with all applicable risk management policies and procedures; ensures appropriate in-service training is provided to staff and youth.

## Executive Director

Develops, implements and manages program finances; ensures all functions and programs under charge are performed within established budgetary parameters, to include performing budget projections, costing activities, forecasting revenues and expenditures, and ensuring sound fiscal control.

- Coordinates and executes fundraising activities, appropriately utilizes donations, and properly applies grant funding and various financial resources.
- Ensures all monetary functions are performed in compliance with IRS documentation and reporting regulatory requirements.
- Develops and maintains positive relationships with community agencies to provide cost free services to the youth in our care.
- Performs related duties for which the incumbent is qualified as necessary.

*This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned. It is not designed to be a comprehensive listing of activities, duties or responsibilities required.*

### **AMIkids Values for Our Leaders**

- Ensures program team member interact with youth in a manner that demonstrates a "Kids First" commitment.
- Displays honesty in all interactions with other individuals and in tasks that involve documentation.
- Exhibits integrity in all interactions with people.
- Strives for excellence in all tasks and projects.
- Generates productive enthusiasm in a variety of settings.
- Leads a goal oriented lifestyle by actively creating, modifying and achieving a written set of goals.
- Embraces diversity in such a manner that allows for productive interactions with people from all walks of life.
- Demonstrates creativity in problem solving situations.
- Embraces the key aspects that comprise an effective family; warmth, discipline and empowerment.
- Engages in practices that model safety.
- Demonstrates loyalty to the mission, values and goals of the organization.
- Demonstrates the ability to lead groups of people.
- Shows a commitment to dedication by providing excellent service towards individual kids and families.

### **Minimum Education, Training and Experience**

Bachelor's Degree; supplemented by four (4) years professional experience in a children's rehabilitation or residential facility to include supervisory/administrative responsibility; or any combination of education, training and experience equal to or greater than defined regulatory requirements.

OR

Bachelor's Degree in Social Work, Psychology, Counseling or Administration; supplemented by three (3) years experience working with children to include supervisory/administrative responsibility; or any combination of education, training and experience equal to or greater than defined regulatory requirements.

OR

Master's Degree in Social Work, Psychology, Counseling or Administration or related field; supplemented by two (2) years professional experience working with children to include supervisory/administrative responsibility; or any combination of education, training and experience equal to or greater than defined regulatory requirements.

OR

An individual who is in the process of obtaining a degree and supplemented by ten (10) years professional experience in a children's rehabilitation or residential facility to include supervisory/administrative responsibility.

### **Certifications, Licenses and Registrations**

- Must satisfy criminal background check and drug screening as defined by state requirements.

## Executive Director

- Must satisfy physical abilities and medical testing as defined by federal regulations.
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).
- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.
- Must possess and maintain valid driver's license in the state of employment that meets criteria defined in AMIkids Transportation Standards; may be required to obtain and maintain a Commercial Driver's License (CDL) with passenger and school bus endorsement.

### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

### **Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (12-20 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

*I have read and understand the information included in this position description. I possess the minimum qualifications for the position as it is defined, and verify my ability to perform the job listed herein, with or without reasonable accommodations.*

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
REGIONAL DIRECTOR SIGNATURE

\_\_\_\_\_  
DATE



## Job Description

**Position Title:** Lead Teacher

**FLSA Status:** Exempt

**Position Code:** LDTEACH

**EEO Category:** Professional

**Reports To:** Director of Education/Executive Director

### Position Summary

The Lead Teacher ensures the educational quality of the program by coordinating the educational assessment program, teaches special education students, assists other instructors to improve their teaching skills, establishes and maintains educational plans, and maintains related administrative systems. In addition, as a staff member, the Lead Teacher's primary concerns include the safety, supervision, advising, counseling, and role modeling for our students.

### Essential Job Duties

- Works with program managers to ensure a quality educational component.
- Works with program managers to ensure compliance with all state, local, and contractual education requirements.
- Completes educational assessments for each student according to federal, state and local requirements.
- Develops educational goals for each student.
- Monitors student educational progress throughout enrollment.
- Ensures that all areas of curriculum are in place including core courses, GED preparation and post-secondary education.
- Ensures that special education students are receiving services and that services are documented according to federal, state, and local requirements.
- Reviews lesson plans of all instructional staff to ensure compliance with federal, state and local requirements.
- Assists other instructors in lesson planning, curriculum development, and teaching strategies.
- Instructs students in assigned classes.
- Creates a classroom that is conducive to learning and appropriate to the maturity and interests of the students.
- Works with program managers to ensure institute schedule is in compliance with TED® standards and local requirements.
- Works with continuing care staff to ensure appropriate educational placement.
- Supervises students during all hours of the workday, including mealtimes, according to the supervision policy.

- Serves as advisor and positive role model for assigned students and prevents and intervenes in student altercations and incidents.
- Assumes supervision responsibilities for absent instructors as directed by supervisors.
- Administers first aid and CPR during emergencies in accordance with American Red Cross standards.
- Conducts and practices emergency evacuation procedures.
- Writes reports as required by program standards and report schedule.
- Performs other duties as assigned.

### **AMIkids Values for Our Leaders**

- Ensures program team member interact with youth in a manner that demonstrates a "Kids First" commitment.
- Displays honesty in all interactions with other individuals and in tasks that involve documentation.
- Exhibits integrity in all interactions with people.
- Strives for excellence in all tasks and projects.
- Generates productive enthusiasm in a variety of settings.
- Leads a goal oriented lifestyle by actively creating, modifying and achieving a written set of goals.
- Embraces diversity in such a manner that allows for productive interactions with people from all walks of life.
- Demonstrates creativity in problem solving situations.
- Embraces the key aspects that comprise an effective family; warmth, discipline and empowerment.
- Engages in practices that model safety.
- Demonstrates loyalty to the mission, values and goals of the organization.
- Demonstrates the ability to lead groups of people.
- Shows a commitment to dedication by providing excellent service towards individual kids and families.

### **Minimum Education, Training and Experience**

Bachelor's degree

Possess a minimum of two (2) or more years of teaching experience

### **Certifications, Licenses and Registrations**

- Possesses or is eligible for State teacher certification.
- Possesses or is eligible for certification in Special Education.
- Must satisfy criminal background check and drug screening as defined by state requirements.
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).

- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.
- Must possess and maintain a current valid driver's license in the state of employment (CDL may be required with State specified endorsement).

#### **KEY COMPETENCIES**

- Excellent communication skills
- Excellent ability to work in and coordinate teams
- Strong problem analysis and resolution skills
- Strong ability to counsel and persuade others
- Ability to research issue and gather relevant information
- Ability to plan and organize work to ensure deadlines are met
- Strong follow-up skills
- Ability to switch priorities and multi-task
- Exceptional integrity and ability to maintain confidentiality

#### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

#### **Physical Requirements**

While performing the duties of this job, the staff member is regularly required to stand, walk, sit, and talk or hear. The staff member is occasionally required to climb or balance; stoop, kneel, crouch, or crawl; and taste or smell. Specific vision abilities required by this job include close vision, distance vision, and peripheral vision.

*I have read and understand this job description and can perform all the duties listed with or without reasonable accommodations.*

\_\_\_\_\_  
**EMPLOYEE SIGNATURE**

\_\_\_\_\_  
**DATE**

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**MANAGER/SUPERVISOR SIGNATURE**

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**DATE**



Separating a troubled past  
from a bright future

Certified Teacher

Position Code: TEACH

FLSA Status: Exempt

Department: Education

Reports to: Director, Education

*AMKkids is a non-profit dedicated to helping troubled youth develop into responsible and productive citizens. AMKkids' mission is to protect the public safety and positively impact as many youth as possible through the efforts of a diverse and innovative staff. AMKkids works in partnership with youth agencies, local communities and families.*

### **General Description of Duties**

The Certified Teacher serves in the instruction and guidance of students within the appropriate grade or academic level. Employees in this job classification are responsible for adhering to recognized curriculum standards, and compliance with instructional guidelines as defined by the local School District and educational systems. Employee performs all work as outlined in the educational component of the Personal Growth Model (PGM). Work includes course delivery, administration of tests (or equivalent course criteria), and the tabulation and submission of students' final course grades. Incumbents performs essential functions as outlined herein according to the specific course or discipline of assignment.

Primary objective is the realization of AMKkids' mission to provide a safe and successful learning environment for troubled youth, while encouraging social and emotional development through the achievement of academic and personal goals.

### **Essential Job Functions as they relate to Core Competencies**

Establishes effective Interpersonal skills to encourage positive cooperation in the work place, and increase team success through meaningful interactions in operations and services.

- Maintains open communication for the development of effective working relationships with all levels of staff and colleagues, as well as external agencies and professionals; develops and maintains community relations and effective key customer and contractor contacts.
- Develops respectful, trusting and enthusiastic work environment to encourage innovative problem solving and creative youth development; acts under the principals of professional conduct ethics, and AMKkids' values.
- Participates in staff meetings and interactive training in open communication and for the dissemination of information, e.g., problem resolution, policy interpretation, procedural changes.

Provides effective Leadership to motivate and guide students toward the successful accomplishment of established educational goals and objectives; develops a successful and productive learning environment; ensures compliance with all applicable local, State and Federal regulatory and contractual requirements governing academic programs

- Assesses and evaluates academic needs of students; provides professional instruction and teaching to a diverse population of students as appropriate to the specified course or discipline and academic level, e.g., general education students, at risk, and/or disabled students.
- Researches, selects, prepares, and maintains appropriate educational development plans, materials, equipment, and resources for each student.
- Adheres to established standards regarding curriculum delivery and requirements as established by the School District and applicable educational systems appropriate to the specified course or discipline; adheres to all contract and state educational guidelines and quality assurance requirements.

## Certified Teacher

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- Delivers instructional material within established academic guidelines and in support of the AMIkids Personal Growth Model; performs all duties in accordance with all applicable policies and procedures.
- Organizes and effectively communicates class/course objectives, standards, and requirements for successful achievement, e.g., syllabi, tests, specific tasks.
- Provides guidance and assistance to students as needed in order to ensure appropriate assimilation of the course content in an effort to support student success and achievement; serves as an academic advisor and positive role model for assigned students.
- Administers tests and conducts evaluation and grading as applicable to the students' specific assignments.
- Calculates student scores and grades and submits students' final class/course grade(s); assists in the completion of student transcripts and educational assessment programs; manages the documentation of Carnegie Units (high school credits) for each student in coordination with the Lead Teacher; assists in the preparation for placement of graduating advisees.
- Identifies and determines appropriate course of action necessary for the resolution of students' academic or behavioral issues and concerns.
- Coordinates all student activities with the Lead Teacher, Director of Education, Program Manager, Director of Operations and/or Executive Director.
- Prevents and intervenes in student altercations and incidents; refers advanced disciplinary issues to appropriate staff/personnel.
- Ensures all appropriate measures are in effect for special needs students.
- Administers first aid and CPR during emergencies in accordance with American Red Cross standards and conducts and practices emergency evacuation procedures; administers student medication(s) in accordance with doctor's orders.
- Performs home visits as dictated by program standards and/or state contract as needed.
- Performs related duties for which the incumbent is qualified as necessary.

### **AMIkids Values for Our Team Members**

- Interacts with youth in a manner that demonstrates a "Kids First" commitment.
- Displays honesty in all interactions with others and in tasks that involve documentation.
- Exhibits integrity in all interactions with people.
- Strives for excellence in all tasks and projects.
- Generates productive enthusiasm in a variety of settings.
- Leads a goal oriented lifestyle by actively creating, modifying and achieving a written set of goals.
- Embraces diversity in such a manner that allows for productive interactions with people from all walks of life.
- Demonstrates creativity in problem solving situations.
- Embraces the key aspects that comprise an effective family; warmth, discipline and empowerment.
- Engages in practices that model safety.
- Demonstrates loyalty to the mission, values and goals of the organization.
- Demonstrates the ability to lead groups of people.
- Shows a commitment to dedication by providing excellent service towards individual kids and families.

**Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

**Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (12-20 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

**Minimum Education, Training and Experience**

Bachelor's Degree in Education, the academic discipline being delivered, or related field; supplemented by a demonstrated aptitude for working with at risk and troubled youth; or any combination of education, training and experience equal to or greater than defined regulatory requirements.

**Certifications, Licenses and Registrations**

Must satisfy criminal background check and drug screening as defined by state requirements.

Must possess and maintain current Teaching Certification, and all necessary academic certifications; NCLB highly qualified designation preferred for the discipline being delivered.

Must satisfy physical abilities and medical testing as defined by federal regulations.

Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).

Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.

Must possess and maintain valid driver's license in the state of employment; may be required to obtain and maintain a Commercial Driver's License (CDL) with passenger and school bus endorsement.

*I have read and understand the information included in this position description. I possess the minimum qualifications for the position as it is defined, and verify my ability to perform the job listed herein, with or without reasonable accommodations.*

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DIRECTOR OR LEAD TEACHER SIGNATURE

\_\_\_\_\_  
DATE

## Job Description

**Position Title:** Shift Supervisor

**FLSA Status:** Exempt

**Position Code:** SHIFTSPV

**EEO Category:** Line

**Reports To:** Director of Operations

### Position Summary

The Shift Supervisor is responsible for the supervision of the Behavior Modification Specialist (BMS)/Direct Care Staff at a residential program. The Shift Supervisor is responsible for the performance management of his/her team, and may participate in the recruiting process and scheduling of the BMS team members. The Shift Supervisor is responsible for the safe and secure operations of the program, ensuring compliance with all local, state and federal requirements. Also provides effective leadership to motivate and guide staff and students toward the successful accomplishment of established program goals and objectives.

### Essential Job Duties

- Develops, coaches and trains entry level staff members in the AMKids' mission, philosophy and impact of work on the Personal Growth Model (PGM).
- Provides feedback into development of work schedules; ensures that coverage is maintained within required ratios
- Provides performance feedback to employees (both positive and constructive) as needed; provides feedback to leadership regarding performance/evaluations, incentives, development opportunities, etc. for staff members
- Supervises staff and students in accordance with operational policies and procedures to ensure the safety and security of all; performs all duties in compliance with all terms and conditions of contractual agreements.
- Instructs students in the general care and maintenance of facility and equipment; may supervise the safe handling of program property and equipment according to establish policies and procedures ensuring all appropriate safety measures and precautions are observed, e.g., marine vessels, vehicles, equipment.
- Supervises and participates in a wide variety of academic, vocational, and motivational activities on and off campus; serves as advisor and positive role model for assigned students in support of the PGM.
- Prevents and intervenes in student altercations and incidents; refers advanced disciplinary issues to appropriate staff/personnel.
- Actively participates and acts as lead in one to ten-day overnight trips, special activities that involve recreational sports, facility and equipment cleaning, grounds maintenance, and equipment relocation that may require sleeping in tents, boats, institutes, etc. under varying weather conditions and that may require extended 16-hour workdays/24 hour on-call status.
- Administers first aid and CPR during emergencies in accordance with American Red Cross standards and conducts and practices emergency evacuation procedures; administers student medication(s) in accordance with doctor's orders.



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- Assists in establishing desirable student conduct and discipline; leads and/or participates in positive reinforcement, interdisciplinary and/or care review meetings
- Leads/participates in programs and special activities involving facility and equipment cleaning, grounds maintenance and equipment relocation; operates institute vehicles as required in accordance with van policies and procedures.
- Attends all required training/professional development events and maintains all appropriate certifications and licenses.
- Assist with special projects and other duties as needed

*This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned. It is not designed to be a comprehensive listing of activities, duties or responsibilities required.*

#### **Minimum Education, Training and Experience**

- High School/GED
- One to two years experience working with youth; preferably within the Juvenile Justice System
- Six months to one year experience in a supervisory role preferred
- Associates or Bachelor's degree highly desirable

#### **Certifications, Licenses and Registrations**

- Must satisfy criminal background check and drug screening as defined by state requirements.
- Current certification as a CPR and First Aid by a nationally recognized organization (e.g., American Heart Association)
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM), Crisis Intervention Training (CIT)
- Must possess and maintain a current valid driver's license (CDL may be required with State specified endorsement)
- Successfully complete and pass the physical restraint training course.
- Be able to complete trainings outside the program when required (may need to travel to other locations).

#### **KEY COMPETENCIES**

- Strong communication skills
- Solid leadership ability
- Strong problem analysis and resolution skills
- Strong team player
- Ability to coach and counsel others – both direct reports and youth
- Ability to switch priorities, multi-task and meet deadlines
- Exceptional integrity and ability to maintain confidentiality

#### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat,



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humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths between the ages of 14 and 18.

#### **Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (12-20 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

*I have read and understand this job description and can perform all the duties listed with or without reasonable accommodations.*

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

For HR Use Only			
<b>Created by:</b>	Debbi Lowder	<b>Date:</b>	March 26, 2012
<b>Document #</b>	SHIFTSPVv1	<b>Last Modified:</b>	April 9, 2012



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## Job Description

**Position Title:** Direct Care Staff

**FLSA Status:** Non-Exempt

**Position Code:** DIRECT

**EEO Category:** Service Worker

**Reports To:** Shift Supervisor or Director of Operations

## Position Summary

The Direct Care Staff is responsible for directing and safely supervising students during their shift. Primary responsibility is to provide guidance in behavior choices by teaching social, self-help, academic and living skills. The Direct Care Staff redirect students who have exhibited inappropriate behavior and supervise student activities, work detail, meals and bed checks. Additional responsibility is to serve as a positive role model and advisor.

## Essential Job Functions

- Ensures the safety and supervision of all students in accordance with all operational and contractual policies
- Prevents and intervenes in student altercations and incidents. May be necessary to physically restrain students as dictated by the Restraint Policy
- Provides redirection and coaching to students who exhibit inappropriate behavior
- Acts as a coach and advisor to students to help them grow and develop in the areas of personal responsibility, social skills, community living skills, interpersonal communications and behavior
- Supervises and ensures the safety of students assigned to disciplinary work detail
- When working overnight shift:
  - Supervises students during quiet and sleeping hours and constantly remains awake and alert
  - Makes student bed checks at scheduled times as required by supervisors
  - Documents student bed checks as required by the Program's policies
- Contacts management as directed and notifies them of problems and/or incidents
- Communicates with members of other teams/shifts by voice, telephone or radio as necessary
- Completes incident, accident and behavioral reports according to standard operating procedures
- Documents and reviews required notes in Shift Logs and communicates any issues upon shift change
- Supervises the safe handling of the Program's boats, equipment and vehicles according to established policies and procedures
- Facilitates and participates in staff meetings and staff training sessions
- Assumes supervision responsibilities for absent team members as directed by supervisors
- Actively participates and acts as lead on trips, special activities that involve recreational sports, facility and equipment cleaning, grounds maintenance, and equipment relocation that may require sleeping in tents, boats, institutes, etc. under varying weather conditions and that may require extended 16-hour workdays/24 hour on-call status
- Ensures facility, equipment and supplies are in compliance with all laws, regulations and policies
- Teaches youth how to maintain all equipment within compliance standards
- Maintains repair and maintenance logs and inventory of related equipment
- Administers first aid and CPR during emergencies in accordance with American Red Cross standards
- Drives program's vehicles as required in accordance with AMKids transportation guidelines providing staff member maintains approved driving status
- Assists with special projects and other duties as needed



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- Actual work hours will vary based upon specific Program's shift schedule. Shifts will typically be between 8 or 12 hours but may extend beyond that based on ratio needs
- Shift assignments may change based on Program needs

*This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned. It is not designed to be a comprehensive listing of activities, duties or responsibilities required.*

#### **Minimum Education, Training and Experience**

- High school diploma/GED required
- College degree preferred
- One to two years related experience within an educational or youth service program, preferably working with troubled youth

#### **Certifications, Licenses and Registrations**

- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).
- Must satisfy criminal background check and drug screening as defined by state requirements
- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.
- Must possess and maintain valid driver's license in the state of employment that meets AMKids Transportation Standards
- May be required to acquire and maintain a CDL license

#### **Environmental Conditions**

Work is typically performed in usual indoor classroom or dormitory conditions with some exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the intermittent nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths between 13 – 18 years of age.

#### **Physical Requirements**

In order to perform the essential job functions of this position, some physical demands are required. The individual in this position will be frequently engaged in activities that require body mobility in order to perform such as; lifting and carrying items, moving about in the workplace, and operating some office equipment. Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).



Separating a trucked post  
from a finger figure

The individual in this position must also be capable of maintaining regular attendance, following instructions, understanding workplace materials, and communicating with others. Reasonable accommodations will be made accordingly.

*I have read and understand the information included in this position description. I possess the minimum qualifications for the position as it is defined, and verify my ability to perform the job listed herein, with or without reasonable accommodations.*

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EMPLOYEE SIGNATURE

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DATE

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SUPERVISOR/MANAGER SIGNATURE

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DATE



## Job Description

**Position Title:** Director of Treatment

**FLSA Status:** Exempt

**Position Code:** DIRTREAT

**EEO Category:** Official/Manager

**Reports to:** Executive Director

### General Description of Duties

The Director of Treatment is responsible for the development, implementation and general oversight of all treatment services, including assessments related to treatment needs, treatment plans, and treatment and intervention referrals. Employee executes all Treatment components of the AMKids Personal Growth Model (PGM) and ensures compliance with all applicable local, State and Federal regulatory requirements governing treatment services, e.g., contract requirements, Medicaid. Position provides group, individual, family and crisis counseling services to youth and their families affiliated with the institute. Employee ensures all staff is appropriately trained and certified. Employee assists the Executive Director/Principal in development and implementation of program policies and procedures.

Primary objective is the realization of AMKids' mission to provide a safe and successful learning environment for troubled youth, while encouraging social and emotional development through the achievement of academic and personal goals.

### Essential Job Functions

Establishes effective Interpersonal skills to encourage positive cooperation in the work place, and increase team success through meaningful interactions with Education, Behavior Modification and Behavior Health Overlay Services professionals.

- Maintains open communication for the development of effective working relationships with all levels of staff and colleagues, as well as external agencies and professionals; develops and maintains community relations and effective key customer and contractor contacts.
- Develops respectful, trusting and enthusiastic work environment to encourage innovative problem solving and creative program development; enforces the principals of professional conduct ethics, and AMKids values.
- Participates in and conducts staff meetings and interactive training to develop open communication and for the dissemination of information, e.g., problem resolution, policy interpretation, procedural changes.

Provides effective Leadership to motivate and guide staff toward the successful accomplishment of established treatment goals and objectives; facilitates a successful and collaborative work environment.



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- Schedules, trains and evaluates staff in the achievement of departmental objectives and long-term program goals and initiatives; provides on-site and residential support in the area of treatment and therapy; assists in recruiting, screening and hiring school personnel.
- Develops, coordinates and conducts various structured and informal staff training to facilitate professional development and effectiveness; researches and delivers instructional materials.
- Identifies and facilitates professional growth opportunities; encourages a flexible and responsive work environment; plans and conducts staff meetings and interactive training for the dissemination of information, e.g., problem resolution, policy interpretation, procedural changes.
- Develops partnerships with and maintains contacts with key individuals of state job services, the youth services department, local school systems and service providers in the district; serves as liaison for the Institute to; submits required reports and documentation; acts as liaison between AMIKids corporate office, AMIKids institutes and programs, and regulatory agencies; develops positive school/community relations with industry contacts.

Directs and implements Treatment services while ensuring the integration with the Personal Growth Model; coordinates and oversees delivery of appropriate youth services by qualified staff in the achievement of favorable therapeutic outcomes; executes all applicable policies and procedures.

- Directs the coordination and implementation of Treatment programs; oversees delivery of appropriate youth diagnosis and treatment by qualified staff in the achievement of favorable therapeutic outcomes.
- Develops and implements treatment and supervision plans (e.g. ITP, TPR, and ITP-RE); reviews placement and case treatment files; oversees youth evaluation and treatment plans to ensure programs are individualized and meet the needs of each youth; communicates student families/guardians and probation officers concerning student progress.
- Leads and supervises treatment team meetings, student group activities and sessions, family meetings, and service plan meetings; provides group, individual, family and crisis counseling services to students and their families; leads and implements psycho-educational, delinquency prevention, and treatment groups, e.g. ART, Skillstreaming, CYT, SS.
- Oversees substance abuse/mental health services for students and their families; oversees cases and ensures individualized services are provided.
- Schedules off-site doctor's visits for youth; prepares referrals for off-site clinical services not provided by the institute; maintains reporting of out-service agencies; schedules motivational activities such as field trips and community service opportunities for youth.
- Supervises youth medication administration and maintains required documentation; enforces health and medication policies and procedures.
-

- Ensures treatment components are consistently implemented with integrity and fidelity; conducts treatment services; maintains current knowledge of industry trends and regulatory requirements.
- Monitors and ensures compliance with quality assurance, Medicaid, PGM and any other related standards as they relate to treatment; maintains accurate records according to contracting agency, PGA, Medicaid, state auditing and all other applicable standards.
- Oversees the timely accomplishment of appropriate documentation, data entry, and submission requirements as defined by industry standards and regulatory requirements.
- Ensures all appropriate certifications, licensing and treatment requirements are maintained and in compliance with all applicable regulatory standards.

Participates in the administration of program management and development functions; ensures all treatment related documents are organized, completed with required timelines and maintained in a confidential manner as required by law..

- Practices effective organization, time management, and project management skills to ensure practical and efficient direction of services; ensures timely processing of administrative functions.
- Coordinates and utilizes available Institute and community resources in support of treatment programs, youth program completion and reduced recidivism.
- Researches and evaluates juvenile justice trends and industry developments to enhance program guidelines and operations; coordinates, administers and supervises various program operations, e.g., staffing, activities, reporting, budgeting.
- Drafts and submits documentation and information in support of program reporting and/or requests for proposals as directed; participates and/or leads various special projects as directed; participates in a wide variety of miscellaneous projects in support of the AMKids mission.
- Performs a wide variety of professional and administrative support duties as they relate to the development and implementation of AMKids' vision; prepares and maintains various reports, e.g., head count, discharge, progress, DJJ 180-day, student data in Student Information System (SIS).
- Attends all required training/professional development events and maintains all appropriate certifications and licenses.

**Florida BHOS programs comply with the following:**

- Licensed Practitioners job description includes conducting face-to-face interviews with recipients for development of individualized behavioral health treatment plan, per Medicaid

Community Behavioral Health Coverage and Limitations Handbook; and reviewing and signing off on:

- (a) Recipient certification for eligibility for BHOS-JJ.
  - (b) Clinical psychosocial assessment of the child when prepared by counselor, and
  - (c) Individualized behavioral health treatment plan, prior to the treating practitioner's (Licensed Practitioner of the Healing Arts as defined in the Medicaid Community Behavioral Health Coverage and Limitations Handbook page 2-4-9) review and authorization; and
  - (d) Provision of clinical supervision to counselors.
  - (e) May conduct behavioral health assessments and provide direct treatment services.
- This position functions as the Designated Mental Health Authority (DMHA) and is responsible for ensuring compliance with the DJJ Mental Health and Substance Abuse Services Manual.

#### **Minimum Education, Training and Experience**

Master's degree in Psychology, Social Work, or other counseling related field.

#### **Certifications, Licenses and Registrations**

- State licensure as a psychologist licensed pursuant to chapter 490, Florida Statutes; or a mental health counselor, clinical social worker, or marriage and family therapist licensed pursuant to chapter 491, Florida Statutes.
- Must satisfy physical abilities and medical testing as defined by federal regulations.
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).
- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.
- Must possess and maintain valid driver's license in the state of employment; may be required to obtain and maintain a Commercial Driver's License (CDL) with passenger and school bus endorsement.



#### **KEY COMPETENCIES**

- Excellent communication skills
- Excellent ability to work in and coordinate teams
- Strong problem analysis and resolution skills
- Strong ability to counsel and persuade others
- Ability to research issue and gather relevant information
- Ability to plan and organize work to ensure deadlines are met
- Strong follow-up skills
- Ability to switch priorities and multi-task
- Exceptional integrity and ability to maintain confidentiality

#### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

#### **Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (12-20 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

*I have read and understand this job description and can perform all the duties listed with or without reasonable accommodations.*

\_\_\_\_\_  
**EMPLOYEE SIGNATURE**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**MANAGER/SUPERVISOR SIGNATURE**

\_\_\_\_\_  
**DATE**



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## Job Description

**Position Title:** Human Services Professional

**FLSA Status:** Salaried Non-Exempt

**Position Code:** HSP

**EEO Category:** Professional

**Reports To:** Lead Clinical Staff

### Position Summary

The Human Services Professional (HSP) is responsible for evaluating, assessing and caring for students who are receiving Residential Intermediate Group Care services. Responsibilities involve facilitating the case management process which includes evaluating student needs and ensuring the timely delivery of appropriate program services to meet behavioral, psychological and psychosocial development and progress with established goals in each student's Individual Care Plan (ICP). The HSP also serves as a liaison between the parents and the Program and between the appropriate State Agency and the Program.

### Essential Job Functions

- Meets a minimum of every other week with Program staff (either individually or in groups) to discuss student cases and monitor student behavioral, psychological and psychosocial development.
- Develops and maintains Individual Care Plan (ICP) for each student
- Develops, approves and signs Weekly Summary Notes
- Ensures Program staff are completing weekly behavioral up-dates and weekly goal progressions
- Formulates a Care Plan Review (CPR) every three (3) months for each student
- Ensures the disbursement of comprehensive, professionally-prepared monthly reports to the parent/guardian, judge and DJJ Probation Officer on each student within 2 business days of the Treatment Team meeting
- Serves as an advisor and positive role model for assigned students
- Provides guidance and assists in the preparation for placement of graduating students
- Schedules and conducts regular counseling sessions with students and staff.
- Attend and professionally represent the program at meetings and student legal proceedings, as required
- Assists in establishing desirable student conduct and discipline; prevents and intervenes in student altercations and incidents
- Physically restrains students if necessary as dictated by the Restraint Policy.
- Leads and/or participates in positive reinforcement, interdisciplinary and/or care review meetings
- May facilitate or assist with facilitation of ART, CYT and/or Life Skills group programs
- Schedules transitional meetings 60 days prior to release date and assists in the development of a Transition Plan 30 days prior to the student's termination
- Ensures each student is post-tested and has a completed transitional plan and transcript before release date
- Participates in programs and special activities involving facility and equipment cleaning, grounds maintenance and equipment relocation; operates institute vehicles as required in accordance with van policies and procedures



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- Complies with Program Standards and State Standards for Residential Intermediate Group Care Service.
- Drives institute vehicles as required in accordance with the AMKids transportation standards.
- Administers student medication(s) in accordance with doctor's orders
- Attends all required training/professional development events and maintains all appropriate certifications and licenses; cross-train staff to administer meetings in the absence of the HSP
- Assist with special projects and other duties as needed

*This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned. It is not designed to be a comprehensive listing of activities, duties or responsibilities required.*

#### **Minimum Education, Training and Experience**

- Bachelor's degree in Psychology, Social Work, or other counseling related fields from an accredited educational institution
- Master's degree preferred
- Minimum of three (3) years related experience and/or training; or equivalent combination of education and experience.

#### **Certifications, Licenses and Registrations**

- South Carolina license preferred (e.g. mental health, clinical social work, marriage and family therapy, alcohol/substance abuse etc.); or experience working under the direct supervision of a licensed clinical professional, according to state statutes (also preferred).
- Must satisfy criminal background check and drug screening as defined by state requirements.
- Current certification as a CPR and First Aid by a nationally recognized organization (e.g., American Heart Association)
- Must possess and maintain a current valid driver's license in the state of employment that meets AMKids Transportation Standards (CDL may be required with State specified endorsement).
- Successfully complete and pass the physical restraint training course.
- Be able to complete trainings outside the program as needed (travel may be required)

#### **KEY COMPETENCIES**

- Excellent communication skills
- Excellent ability to work in and coordinate teams
- Strong problem analysis and resolution skills
- Strong ability to counsel and persuade others
- Ability to research issue and gather relevant information
- Ability to plan and organize work to ensure deadlines are met
- Strong follow-up skills
- Ability to switch priorities and multi-task
- Exceptional integrity and ability to maintain confidentiality

#### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat,



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humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths between the ages of 13 and 18.

**Physical Requirements**

While performing the duties of this job, the staff member is regularly required to stand, walk, sit, and talk or hear. The staff member is occasionally required to climb or balance; stoop, kneel, crouch, or crawl; and taste or smell. Specific vision abilities required by this job include close vision, distance vision, and peripheral vision.

*I have read and understand this job description and can perform all the duties listed with or without reasonable accommodations.*

\_\_\_\_\_  
EMPLOYEE SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SUPERVISOR/MANAGER SIGNATURE

\_\_\_\_\_  
DATE

Business Manager

Position Code: BUSMGR  
FLSA Status: Exempt

Department: Program Admin  
Reports to: Executive Director

**General Description of Duties**

The Business Manager assists the Executive Director in the administration with various program functions, e.g., personnel management, financial management, board relations, fund raising. Employee maintains confidentiality of sensitive information, facilitates efficient program operations, and assists in creating an effective work environment. Position may supervise entry level support staff.

Primary objective is to support the AMKids' mission and Personal Growth Model, providing a safe and successful learning environment for troubled youth, while encouraging social and emotional development through the achievement of academic and personal goals.

**Essential Job Functions as they relate to Core Competencies**

Establishes effective Interpersonal Skills to encourage positive cooperation in the work place, and increase team success through meaningful interactions in all operations and services.

- Maintains open communication for the development of effective working relationships with all levels of staff, as well as external agencies and professionals; develops and maintains productive working relationships with corporate Support Services, Finance and Operations.
- Supports respectful, trusting, enthusiastic and safe work environment to encourage innovative problem solving and creative program development; performs all work within the principals of professional conduct ethics, and AMKids values.
- Acts as liaison between AMKids corporate office, AMKids schools and programs, local Board of Trustees, local School Districts, and regulatory agencies; develops positive school/community relations; may engage in various public speaking forums.
- Participates in, and may conduct, staff meetings and interactive training to develop open communication, and for the dissemination of information, e.g., problem resolution, policy interpretation, procedural changes.
- Supervises and serves as positive role model for assigned students; actively participates in day trips and special activities that involve recreational sports, facility and equipment cleaning, grounds maintenance and equipment relocation.

Participates in the Administration of program operations, management and development functions; practices effective organization, time management, and project management skills to ensure practical and efficient direction of services; ensures timely processing of administrative functions.

- Performs a wide variety of professional and administrative support duties as they relate to the development and implementation of AMKids' vision; performs a variety of essential record keeping duties and maintenance of program filing systems, e.g., personnel, payroll, accounting, banking, student information.
- Drafts and submits documentation and information in support of program reporting and/or requests for proposals as directed; participates and/or leads various special projects as directed; participates in a wide variety of miscellaneous projects in support of the AMKids' mission.
- Coordinates travel, lodging, conferences, and other Institute activities for staff and management.
- Coordinates available Institute and community resources, as directed, in support of program operations, youth program completion and reduced recidivism.
- Monitors and complies with National School Lunch Program requirements and standards (where applicable) and invoices school district and other agencies as required.

## Business Manager

- Drives institute vehicles as needed, in accordance with the Transportation Guidelines; administers first aid and CPR during emergencies in accordance with Red Cross standards; attends all required training/professional development; maintains all appropriate certifications and licenses.
- Responsible for data entry and updating the State's Staff Verification System pursuant to the Department's directive.
- May administer and control student medication in accordance with doctor's orders.

Performs various Human Resources, Benefits and Payroll functions; assists with recruiting, screening, hiring and training school personnel; supports the development of personnel.

- Obtains, verifies, records and maintains personnel information and reports any personnel changes to accounting, payroll and benefits within established time lines; manages all aspects of payroll including preparation of accurate payroll transmittals and maintenance of all records in compliance with labor regulations and organization policy; maintains Personal Time Off (PTO) benefits for employees.
- Responsible for pre-hire screening requirements (including but not limited to pre-employment drug tests, criminal background checks, sex offender registry checks and pre-employment MVR).
- Monitors and maintains staff MVR status, 5 year re-screens and Affidavit of Good Moral Character.
- Monitors and maintains record keeping of all appropriate certifications, licensing and educational requirements; receives and submits in compliance with all applicable regulatory standards.
- Oversees the delivery of training to staff within specified time frames and contractual guidelines as well as coordinating and scheduling training for staff when needed and documenting its delivery and successful completion.
- Responsible for the scheduling, coordinating, facilitating of new hire training and yearly training for the institute.
- Monitors staff required training and ensures all team members are in compliance with all training topics as outlined by contractual and state regulations.
- Maintains staff training files in an orderly manner that adheres to contractual requirements.
- Ensures training plans are sent to appropriate monitoring personnel (DJJ and AMIkids) within required timeframes as specified by contractual requirements and policies.
- Ensures all staff training is entered into required reporting systems (CORE) accurately and in a timely manner.

Assists with the administration of Risk Management for the local school to ensure safe and successful working and learning conditions are provided.

- Ensures operational, administrative and reporting compliance with all applicable risk management policies and procedures; ensures appropriate in-service training is provided to staff and students; functions as Secretary of Safety Committee; forwards minutes to Risk Management monthly.
- Investigates and implements policy and procedural changes to reduce organizational liability and financial risk, e.g., general and professional liability, employment liability, student and staff safety liabilities, employee misconduct, workers compensation claims, property and vehicle insurance claims.

Manages various School Finances as directed; ensures all functions and programs under charge are performed within established budgetary parameters, to include performing budget projections, costing activities, monitoring revenues and expenditures, and ensuring sound fiscal control.

- Performs general financial functions of the Institute according to generally accepted standard accounting principles and regulatory requirements applicable to the work; performs general clerical work according to established administrative policies and procedures; functions to pass all audits and inspections.

## Business Manager

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- Assists the Executive Director with board, public relations, fundraising activities, preparation and maintenance of annual budget and in assembling information for grant funding.
- Monitors and keeps accurate institute property inventory.
- Monitors monetary functions to verify compliance with IRS documentation and reporting regulatory requirements.
- Manages accurate cash ledgers, monitors cash flow, records of deposits, withdrawals, checks and other accounting instruments.
- Meets with the Executive Director to review financials and monthly expenditures versus budgeted expenditures and assists with developing and implementing corrective actions when/if needed.
- Maintains a corporate binder or file which contains all program contracts, cooperative agreements, letters of support, leases, corporate bylaws, articles of incorporation and updated organizational chart.

Performs related duties for which the incumbent is qualified as necessary.

### **AMIkids Values for Our Team Members**

- Interacts with youth in a manner that demonstrates a "Kids First" commitment.
- Displays Honesty in all interactions with others and in tasks that involve documentation.
- Exhibits Integrity in all interactions with people.
- Strives for Excellence in all tasks and projects.
- Generates productive Enthusiasm in a variety of settings.
- Leads a Goal Oriented lifestyle by actively creating, modifying and achieving a written set of goals.
- Embraces Diversity in such a manner that allows for productive interactions with people from all walks of life.
- Demonstrates Creativity in problem solving situations.
- Embraces the key aspects that comprise an effective Family; warmth, discipline and empowerment.
- Engages in practices that model Safety.
- Demonstrates Loyalty to the mission, values and goals of the organization.
- Demonstrates the ability to Lead groups of people.
- Shows a commitment to Dedication by providing excellent service towards individual kids and families.

### **Minimum Education, Training and Experience**

- High School Diploma/GED plus a minimum of 4 years experience as an Administrative Assistant, preferably as an Executive Assistant or Office Manager and experience in bookkeeping or other budget management experience;
- OR**
- Associates Degree plus a minimum of 2 years experience as an Administrative Assistant, preferably as an Executive Assistant or Office Manager and experience in bookkeeping or other budget management experience;
- OR**
- Bachelor's degree in Business Administration, Education or related field

### **Certifications, Licenses and Registrations**

- Must satisfy criminal background check and drug screening as defined by state requirements.
- Must satisfy physical abilities and medical testing as defined by federal regulations.
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).
- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.
- Must possess and maintain valid driver's license in the state of employment; may be required to obtain and maintain a Commercial Driver's License (CDL) with passenger and school bus endorsement.
- Must successfully complete online Business Manager testing, e.g., Microsoft Excel and Outlook, Business Writing, and Accounting terminology.

## Business Manager

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### **Environmental Conditions**

Work is typically performed in usual office conditions with rare exposure to disagreeable environmental factors. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

### **Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (12-20 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

*I have read and understand the information included in this position description. I possess the minimum qualifications for the position as it is defined, and verify my ability to perform the job listed herein, with or without reasonable accommodations.*

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SIGNATURE

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DATE

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EXECUTIVE DIRECTOR SIGNATURE

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DATE



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## Job Description

**Position Title:** Food Service Worker

**FLSA Status:** Non-Exempt

**Position Code:** FOODWKR

**EEO Category:** Service Worker

**Reports To:** Director of Operations

### Position Summary

Responsible for teaching and safely conduct the planning, preparation, and serving of Institute meals. The Food Service Worker will safely supervise students under instruction in quality menu planning, food preparation, waste disposing, recycling and serving standards. In addition, as a staff member, the Food Service Worker will maintain production records, inventories, contract audit documentation and equipment, supply, maintenance logs. The Food Service Worker's main concern includes the safety, supervision, counseling, and role modeling for our students.

### Essential Job Functions

- Plans and submits weekly Institute menus to supervisors within specified time frame according to Institute standards.
- Supervises and instructs students in quality menu planning, food preparation, and serving of meals.
- Oversees and encourages recycling practices and waste disposal according to local procedures.
- Plans and prepares meals for Institute special events (trips, graduations, and holidays).
- Submits and maintains weekly food Inventory according to Institute policies, the NSLP, and school contracts standards.
- Assures maintenance and cleanliness of facility equipment and supplies
- Maintains safe and secure storage of kitchen area facility, equipment, supplies and food.
- Develops and practices emergency situation procedures including kitchen fires and serious student accident injuries.
- Communicates maintenance repairs and supplies needs to supervisor.
- Teaches students how to maintain all equipment within compliance standards.
- Keeps, maintains, and submits daily food production records and counts for state contract audits.
- Maintains accurately a weekly food inventory.
- Documents, and maintains files on inventories, temperature logs and production records.
- Maintains documentation for NSLP, USDA, and DHHS reports.
- Serves as advisor and positive role model for assigned students.
- Prevents and intervenes in student altercations and incidents.
- Assumes supervision responsibilities for absent instructors as directed by supervisors.
- Actively participates in day trips and special activities that involve recreational sports, facility and equipment cleaning, grounds maintenance, and equipment relocation.
- Attends behavioral meetings and student awards meetings with staff and supervisors.
- Administers first aid and CPR during emergencies in accordance with American Red Cross standards.
- Conducts and practices emergency evacuation procedures, serious student accident injuries and fire evacuation procedures.
- Assist with special projects and other duties as needed

*This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned. It is not designed to be a comprehensive listing of activities, duties or responsibilities required.*

### Minimum Education, Training and Experience

- High School Diploma or GED
- 1 to 2 years related experience.

### Certifications, Licenses and Registrations

- ServSafe certification preferred
- Must satisfy criminal background check and drug screening as defined by state requirements.



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- Must possess and maintain a current valid driver's license in the state of employment (CDL may be required with State specified endorsement).
- Must obtain and maintain appropriate crisis intervention and physical restraint training and certification as defined by state requirements, e.g., Protective Action Response (PAR), Nonviolent Crisis Intervention (NCI), Crisis Prevention Institute (CPI), Safe Crisis Management (SCM).
- Must obtain and maintain current CPR and First Aid Certification by nationally recognized organization.

#### **KEY COMPETENCIES**

- Ability to interact and teach students of a variety of backgrounds and experience
- Ability to plan and organize work to ensure deadlines are met
- Ability to research issue and gather relevant information
- Good communication skills
- Good follow-up skills
- Ability to switch priorities and multi-task
- Exceptional integrity and ability to maintain confidentiality

#### **Environmental Conditions**

Work is typically performed in usual Kitchen conditions with some exposure to disagreeable environmental factors, e.g., heat, cold. Some tasks include potential for intermittent exposure to outdoor elements, e.g., heat, humidity, inclement weather. Some may involve working in and around moving vehicles and associated vehicle/equipment areas, where heightened awareness to surroundings and observance of established safety precautions is essential in avoidance of injury or accidents. Due to the nature and location of the work environment, incumbent must possess a tolerance and ability for working with adjudicated youths.

#### **Physical Requirements**

Tasks involve the ability to exert very moderate physical effort in light work, typically involving some combination of sitting, standing, walking, repetitive motions and finger dexterity, and which involve some lifting, carrying, pushing and/or pulling of objects and materials of moderate weight (10-50 pounds). Tasks may involve the intermittent performance of extremely physically demanding work, involving restraining procedures and physical intervention using a nationally recognized or state required nonviolent technique (weight exceeding 150 pounds).

*I have read and understand this job description and can perform all the duties listed with or without reasonable accommodations.*

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**EXECUTIVE DIRECTOR SIGNATURE**

\_\_\_\_\_  
**DATE**

# Henrietta H. Gethers

831 Parkersville Road  
PO Box 1964  
Pawleys Island, South Carolina 29585  
United States

**Tel (H):** 843 235 6707

**Tel (W):** 843 546 5478

**E-mail:** Hennypenny7@hotmail.com

## Work Experience

Georgetown Marine Institute 12/01/2006-Present  
Georgetown, South Carolina

### Director of Treatment

Overseeing two Lead Clinical Counselors and twenty Behavior Modification Specialist, adhering to Medicaid guides, meeting Medicaid expectations, providing counseling, training and developing treatment plans for students. Maintain contact with families and Probation Officers, developing Progress Summary Notes, facilitating groups for Cannabis Youth Treatment, Aggression Replacement Training and Skill Streaming (life skills) Facilitates Youth Assessment and Screening Instrument on students.

- Awarded "The Dedication Award" for Lead Clinical Counselors from The Associated Marine Institute 2006

Georgetown Marine Institute 08/01/1997-12/01/2006  
Georgetown, South Carolina

### Lead Clinical Counselor

Developed Service plans for students, wrote Progress Summary Notes and maintain contact with families and Probation Officers. Administered and monitored medication to students, served as a role model and facilitated moral activities with staff and students. Completed Youth Assessment and Screening Instrument on students.

- Awarded "Best of the Best" for Lead Clinical Counselors from The Associated Marine Institute 2001

## Education

### Master of Arts in Counseling

Webster University 10/01/2003-05/21/2005  
Myrtle Beach, South Carolina

# Michael Wright

## Objective

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To obtain position of Executive Director at AMIkids Georgetown.

## Experience

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**2-25-2009—2-10-2011**

**AMIkids Acadiana**

**Branch, LA**

### Executive Director

- Manages and oversees all program operations
- Manages all Institute administrative, financial and human resource system in an effective and efficient manner
- Contributes to organizational development and the AMIkids Vision
- Develops and maintains productive relationship with the local Board of Trustees and community
- Provide enhancements to contracts and adds value to program beyond requirements
- Assist in the development of individuals for future managerial positions

**11-1-1995—2-10-2009**

**AMIkids Georgetown**

**Georgetown, SC**

### Executive Director

- Manages and oversees all program operations
- Manages all Institute administrative and human resource system in an effective and efficient manner
- Contributes to organizational development and the AMIkids Vision
- Develops and maintains the local Board of Trustees and community relations
- Provide outreach and support to other programs
- Provide enhancements to contracts and adds value to program beyond requirements
- Assist in the development of individuals for future managerial positions

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**6-5-98—Present**

**Georgetown Police Department**

**Georgetown, SC**

### Patrol Officer

- To protect and serve the citizens of Georgetown
- Support an aid Local, State and Federal Law Enforcement Agencies

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**Interest and Activities**

**Phi Beta Sigma Incorporated**

**Georgetown, SC**

### Active Member

- Provide community service
  - Provide scholarships
-

## Michael Wright

### Interest and Activities

#### Men In The Gap

Georgetown, SC

##### President

- o Mentoring program that for young men between the ages of 13-18
- o Positive role model
- o Engage in community service with the young men

##### Chairperson

Georgetown Interagency

Georgetown, SC

- o Group of agencies such as CASA and Helping Hands that provides assistance to individuals in need.

##### Chairman

HEARTS Inc

Georgetown, SC

- o Organization working to reach the youth of Georgetown and surrounding counties.

##### Sergeant at Arms

Georgetown Rotary Club

Georgetown, SC

- o Work to prevent any occurrence that might detract from the dignity of the club.

## Education

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1990-1994 (Graduated 07)

Morris Brown College

Atlanta, GA

## Organization Management and Leadership

1984-1988 Graduated

Georgetown High School

Georgetown, SC

## References

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References are available on request.

**Patrick Cumbee**  
154 Freddie Lane  
Andrews, South Carolina 29510  
(843) 359-9021  
[cumbeepatrick@live.com](mailto:cumbeepatrick@live.com)

**OBJECTIVE:** To secure an opportunity that would allow me to utilize my analytical, communication, and organizational skills.

**EDUCATION:**

Benedict College  
Columbia, South Carolina  
Bachelor of Science, Criminal Justice

*August 1999-May 2003*

Andrews High School  
Andrews, South Carolina  
Diploma

*August 1995-May 1999*

**EXPERIENCE:**

Team Leader, AMI Kids  
Georgetown, South Carolina

*April 2009- Present*

Makes a positive impact on the students through role modeling, development, and motivation; serves as general leader and positive role model for assigned students; prevents and intervenes in student altercations and incidents; facilitates and participates in staff meetings and staff training sessions; ensures facility, equipment, and supply compliance with laws, regulations, and policies; maintains repair and maintenance logs and inventory of related equipment; assists in implementation of new policies and procedures; performs other duties as assigned by supervisors.

Police Officer, Andrews Police Department  
Andrews, South Carolina

*August 2004 - April 2009*

Provided for public safety by maintaining order, responding to emergencies, protecting people and property, enforcing motor vehicle and criminal laws, and promoting good community relations; Identified, pursue, and arrest suspects and perpetrators of criminal acts; Recorded facts to prepare reports that document incidents and activities; Reviewed facts of incidents to determine if criminal act or statute violations were involved; Rendered aid to accident victims and other persons requiring first aid for physical injuries; Testified in court to present evidence or act as witness in traffic and criminal cases

Correctional Officer, Georgetown County Detention Center  
Georgetown, South Carolina

*February 2003-August 2004*

Supervised and controlled inmate behavior during the operation of the detention center; communicated effectively and coherently with other staff or inmates with approved facility communication; demonstrated effective communicative skills with inmates, public and staff; Performed searches of people, vehicles, mail items, objects capable of concealing contraband; Maintained control over inmates by always being aware of their location and documenting such; Administered basic emergency first aid; Transported or escorted inmates (hostile, aggressive, passive, etc.) using handcuffs and other approved restraints in accordance to policy and procedure; Read and comprehend legal and non-legal documents including the processing of such documents as medical instructions, commitments, release orders, summons, and other documents

Youth Advisor, Epworth Children Home  
Columbia, South Carolina

*July 2002-January 2003*

Responsible for the supervision of adolescents/youth; utilizing strength based therapeutic intervention skills to develop a positive rapport; Followed agency rules, policies and procedures by administering and role modeling strength-based crisis prevention, intervention and conflict resolution skills; Communicated and documented adolescent/youth behaviors through participation in treatment team meetings, progress notes (DAP's), communication logs, critical incidents reports, etc; Ensured all documentation is completed before leaving each shift worked; Ensured the general security, maintenance and cleanliness of the facility equipment and supplies; reporting any necessary campus or dorm repairs and issues as needed; Adhered to agency rules, policies and procedures

**PERTINENT COMMUNITY SERVICE:**

Volunteer Coach Georgetown County Recreation Department

**PROFESSIONAL REFERENCES AVAILABLE UPON REQUEST**

**J. YVETTE WIJTHOFF-HERINGA**

90 Ricefield Place  
Georgetown SC 29440  
(843) 546 9610  
[ywijthoff@aol.com](mailto:ywijthoff@aol.com)

- Objective:** To obtain a position in an office environment that will challenge my interpersonal and organizational skills.
- Education:** International School for Hotel Management and Business Administration, the Hague, the Netherlands; Bachelors Degree in Finance and Economy. Currently enrolled in Cont. Ed. Courses at Trident Technical College for Medical Billing and Coding; second semester
- Work Experience:** Georgetown Greenhouses, Inc, Georgetown, SC
- 1995-present      Involved with all office functions for a 20-acre greenhouse facility, including invoicing, accounts payables, accounts receivables, bank account reconciliation, and clerical duties  
Responsible for all payroll related functions  
Customer relations
- 1991-1994      Duke University Office of Continuing Education, Durham, NC
- Program Coordinator for the short course program  
Registration Manager for the short course program
- 1982-1990      Radisson Governors Inn, Research Triangle Park, NC
- Director of Human Resources  
Assistant Maitre d'Hotel  
Dinner Theater Manager  
Assistant Reservations Manager
- Skills:** Proficient in Great Plains accounting software, Paychex, Novatime and ADP payroll software, Microsoft Word, Excel and Outlook  
Fluent in Dutch, French and German

Sherry C Reed  
786 Greentown Road, Georgetown, SC 29440  
843-325-9198  
Rissa9281@gmail.com

**Objective:** To obtain a position that will allow me to utilize my skills and abilities.

**Experience:** 01/2012 -11/2012 Shoreline Behavioral Health Conway, SC

**Clinical Counselor**

- Conducted Alcohol and drug assessments
- Facilitated group and individual therapy sessions
- Provided case management as needed

08/2011-01/2012 Piedmont Mental Health Center Columbia, SC

**Target Case Manager Coordinator**

- Serves as an Advocate for Mentally ill patients
- Performed in-depth assessment on clients to identify and determine needs, Referred clients to outside community agencies that will help/satisfy identified needs of clients.
- Completed documentation as related to contact with outside agencies as well as clients.

03/2007-08/2011 Piedmont Mental Health Center Columbia, SC

**Human Services Specialist II**

- Provide intensive case management, teaching and assisting with budgeting, medication compliance and recreational activity
- Asses client daily signs of non-compliance, relapse symptoms or other safety issues that might prevent reintegration into the community and Maintain medical records.
- Aide in client's safe reintegration in the community through assisting with formulation of service plans and reporting progress to treatment team while attending staff meeting, treatment team staffing and complete mandatory trainings.

7/2005-12/2006 SC Department of Juvenile Justice Columbia, SC

**Juvenile Correctional Officer**

- Maintain the safety, security and control of male adolescents.
- Escorted juveniles to and from scheduled appointments and school.
- Completed incident reports as needed.
- Followed standard policies and procedures.

**Education:** 2001-2005 Claflin University Orangeburg, SC

- B.A., Sociology

2005-2008 Webster University Columbia, SC

- M.A., Counseling

**Erik Wright** (843) 957-7749

Email: edwright67@gmail.com

### **Objective**

My ambition an objective is to be employed with a company that I can be an asset to as I continue to grow through experience and knowledge. I am not just looking for a job, I am looking for a career with a great company that I can consider family. I have a passion to help others.

### **Education**

Graduate of York Technical School -10/2010

Course taken: Heavy Equipment Operator

Recognized by NCCER (National Center for Construction and Research) as Heavy Equipment Operator

Graduate of Tractor Training school ,CDL qualified

TWIC card

DOT Card

### **Equipment experienced and trained on**

Backhoe

Loader

Excavator

Dozers

Skid steer loader

**Although** not experienced or trained on a forklift, I do have a desire to be trained and certified on Forklifts as well.

### **Personality & Character:**

Team player

Great work ethics

Trainable Willingness to learn

Fast learner

Willing to relocate

Diverse-willing to learn and work other aspect of job

Hard Worker

Honest

Dependable

### **Work History**

April-2012

To Present

**All-State Express**

**Logistic Expedite Driver**

As an expedite driver my responsibilities is to deliver clients cargo in safe and timely manner. Maintenance of vehicle, read and understand BOL, (Bill Of Lading).

**Kenersville, NC**

336-992-6880

May-2010

To Present

**Woodberry Trucking**

**Log Truck Driver**

As a log truck driver my duties was to transport logs to the

**Georgetown, S.C**

843-833-1731

mill plant for processing. Other duties included maintenance of tractor and trailer.

February 2010 May 2010	<b>Acadafiana Marine Institute</b> <b>Director of Operations.</b> I reported directly to the executive director of operation whom I assisted in keeping school in compliance with agency guild lines concerning the schools facility, students and employees	<b>Branch ,Louisiana</b> 337-334-4838 843-240-3676
August 2005 – Feb 2010	<b>Georgetown Marine Institute</b> <b>Team Leader/ acting Director of operations</b> <b>/Counsellor</b> Started out as a counsellor that counselled /supervised and educate troubled youth. Promoted to team leader that over saw daily operation of assigned team ,later promoted to acting Director of Operations my duties was to make sure school was in compliance with agencies guild lines concerning students as well as employees.	<b>Georgetown, SC</b> 843-546-5478
January 2000 - August 2007	<b>pet center</b> <b>Sales associate</b> As sales associate I was responsible for the sale of pets and pets supply as well as maintenance of facility.	<b>Surfside Beach, SC</b> 843-238-0888
April 1997 - May 2000	<b>Liberty Life Insurance</b> <b>Agent</b> As an agent I was responsible for sale of life insurance as well as account executive of existing insurance.	<b>Conway, SC</b> Bought out by RBC
March 1995 - June 1998	<b>Rack Room Shoes</b> <b>Assistant manager</b>	<b>Murrells Inlet, SC</b> Out of business

Started out as sales associate, was  
promoted to store assistant manager.  
Over saw sales, inventory, employees,  
and maintenance of store.

## References

Friend: Joe Wallace 843-461-0819

Employer: Luit Woodberry- 843-833-1731

Sister: Evelyn Grayson- 843-359- 9797



## B. Administrative and Financial Capability

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### 3. History and Background: AMKids, Inc. and AMKids Georgetown Marine Institute background in providing services to juvenile offenders

#### Organization Information, Background and Experience

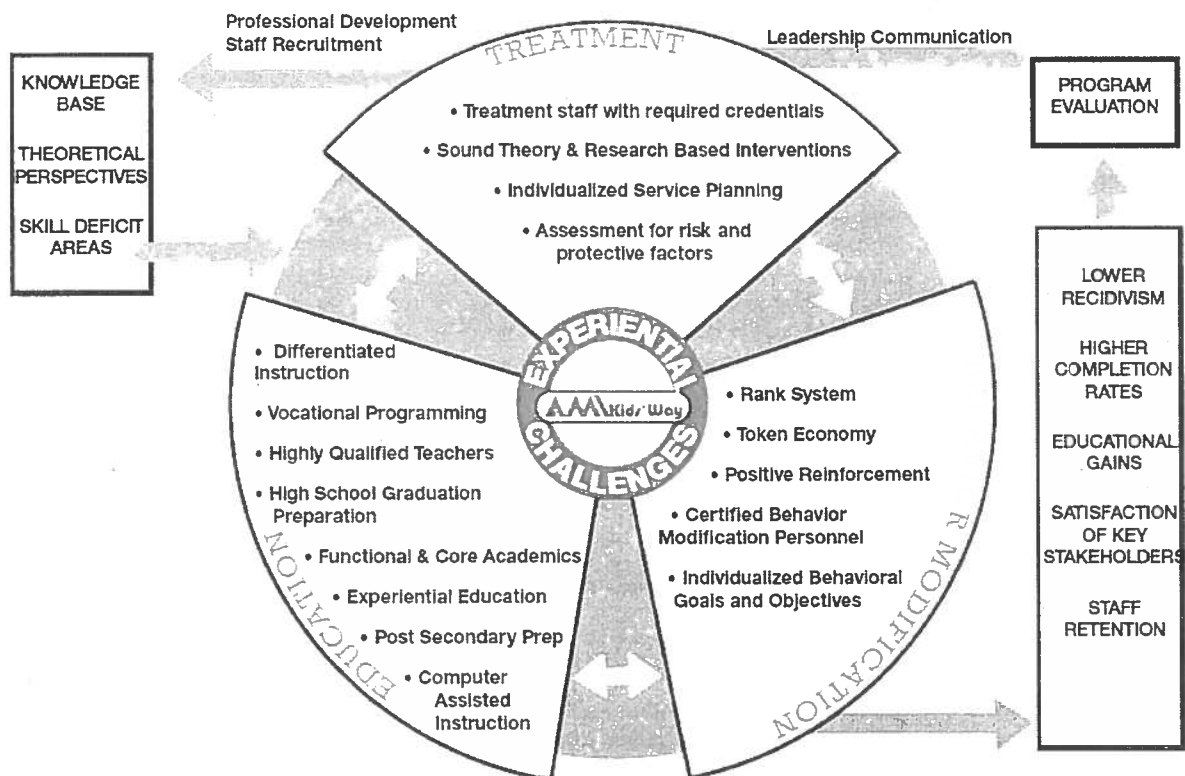
The first AMKids program, The Florida Oceanic Science Institute, was founded in 1969 by juvenile court judge, Judge Frank Orlando, and marine researcher, Bob Rosof, as an alternative to incarceration for troubled youth. The opening of the first AMKids program signaled the beginning of a legacy in youth programming. During the past **44 years**, AMKids has clearly demonstrated its ability to plan, develop, and oversee juvenile residential facilities effectively, while successfully responding to the mental health, substance abuse and behavioral health treatment needs of the youth. Combining its **44-year history** and **national expertise** with **community partnership**, AMKids, Inc. subcontracts with the local AMKids programs to offer a variety of program options to meet the needs of youth and communities, which include Residential, Day Treatment, Infinity Schools, Centers for Academic Discipline, Group Care and Family Services.

AMKids Georgetown Marine Institute, opened in **1989**, has served over **1500 youth** with a **97% favorable termination** rate and a **31% recidivism** rate recorded in our last study (2013 study CY2011). AMKids Georgetown Marine Institute operates 24 hours a day, 7 days a week with youth residing in dormitories on campus and leaving only for off-site, supervised program activities or approved home visitation. AMKids Georgetown Marine Institute differs from what most think of as a traditional residential program, accomplished through building a non-prison, staff secure, welcoming, safe, **family environment** where youth can grow emotionally, physically, intellectually and learn new skills for the future. The youth become part of a family and remain a part of the family even after they leave. AMKids currently contracts for residential facilities in multiple states with six (6) residential DJJ facilities in South Carolina: Georgetown Marine Institute, Camp Sand Hills, Piedmont Wilderness, Camp Bennettsville, Camp White Pines, and Beaufort Marine.

AMKids Georgetown Marine Institute is a different kind of youth programming that embraces the notion of creating a family environment and encouraging **gender specific growth** while still providing a safe, effective program model. AMKids Georgetown Marine Institute creates an environment that teaches boys incarceration is not their future and shows them how to thrive in a caring environment so they are prepared for the responsibilities that come from being a strong, positive male figure in their families and community. AMKids Georgetown Marine Institute teaches the youth critical thinking skills and prepares them to make choices that ensure a bright, crime-free future.



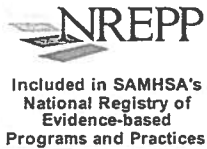
**The AMikids Way:** Giving youth the tools to grow personally is the backbone of AMikids' success. The AMikids Personal Growth Model<sup>®</sup> encapsulates AMikids' culture and values. The AMikids culture components include: **bonding, family atmosphere, non-prison environment, positive learning environment, gender responsiveness, and culturally-relevant programming.** The AMikids culture and values, including evidence-based practices, are threaded throughout the AMikids Personal Growth Model<sup>®</sup> and are manifested in program components such as experiential education, behavior modification, and treatment. Our staff focus on the positive aspects of a youth and his/her behaviors instead of pointing out the negative as so many have already done. This motivates the youth to strive for positive attention and praise instead of acting out to get attention. By celebrating the youth, he/she learns to focus on their own positive attributes and to start to think of themselves differently and picture a new, brighter future.



Since inception, AMikids Georgetown Marine Institute has helped over 1480 of South Carolina's youth change their futures by utilizing evidence-based practices and the AMikids Personal Growth Model<sup>®</sup> (APGM<sup>®</sup>). The APGM<sup>®</sup> has been assessed and listed as an evidence-based program by the *Substance Abuse and Mental Health Services Association (SAMHSA)* and can be found in the *SAMHSA National Registry of Evidence Based Practices and Programs (NREPP)*. The APGM<sup>®</sup> has also been listed in the *United States Department of Justice, Office of Juvenile Justice and Delinquency Prevention (OJJDP) Model Program Guide*. The APGM<sup>®</sup> is a **seamless continuum of care** encompassing educational; vocational; behavior modification; mental health and substance abuse; treatment; dual diagnosis treatment services; and gender specific



treatment including trauma informed care to ensure we are treating the child as a whole and touching on any and all possible needs.



The AMikids Personal Growth Model© (APGM©) has been nationally-recognized by the Substance Abuse Mental Health Services Administration (SAMHSA) National Registry of Evidence-based Programs and Practices as an “evidence-based” model for improving the academic achievement of at-risk students, and for reducing delinquent behavior.



The AMikids Day Treatment Model has been designated as a “promising model” by the Office of Juvenile Justice and Delinquency Prevention for reducing re-offending behaviors and is the only Day Treatment Model recognized.



The AMikids Day Treatment Model has been listed as an evidence-based “promising model” by the Office of Justice Programs Crime Solutions.



AMikids, Inc. has been recommended for national education accreditation by AdvancEd.

Description of all related programs (including the number of clients per year, the total annual program budget and the annual cost per child) administered during the past five years.

Name of Program	Brief Description	Number of Clients Per Year	Total Annual Budget	Annual Cost Per Client
<b>AMikids Big Cypress (Florida)</b>	AMikids Big Cypress is a Moderate Risk Boys Residential program serving males 14-18 years old who may also have Mental Health Overlay Service Needs (MHOS). The program has been in operation since 1995 and has served over 818 youth.	2009: 48 2010: 58 2011: 56 2012: 55 2013: 51	2009: \$1,584,075 2010: \$1,622,053 2011: \$1,789,379 2012: \$1,847,663 2013: \$1,882,758	2009: \$33,001 2010: \$29,966 2011: \$31,953 2012: \$33,593 2013: \$36,917
<b>AMikids Crossroads (Florida)</b>	AMikids Crossroads is currently a DSS facility (since 2012), but was previously a Florida Department of Juvenile Justice Residential Program serving males.	2009: 54 2010: 56 2011: 55 2012: 59 2013: 13 (Contract change in 2012-2013)	2009: \$1,529,207 2010: \$1,608,630 2011: \$1,838,682 2012: \$1,892,787 2013: \$1,406,607	2009: \$28,318 2010: \$28,725 2011: \$33,430 2012: \$32,081 2013: \$108,200



Name of Program	Brief Description	Number of Clients Per Year	Total Annual Budget	Annual Cost Per Client
	AMikids Crossroads opened in 1986 and has served over 1520 youth.			
<b>AMikids Escambia Boys Base (Florida)</b>	AMikids Escambia Boys Base (EBB) opened in June 2013. EBB is a Florida DJJ residential facility serving males 14-18 years old.		Program opened in 2013 so no past data is available.	
<b>AMikids Melbourne Center for Personal Growth (formerly AMikids Space Coast) (Florida)</b>	AMikids Melbourne Center for Personal Growth was incorporated in 1988 and is a Florida DJJ residential program for boys with Substance Abuse Overlay Service Needs (SAOS). The program has served over 1430 youth since opening.	2009: 49 2010: 43 2011: 41 2012: 51 2013: 37	2009: \$1,585,110 2010: \$1,565,376 2011: \$1,556,156 2012: \$1,559,204 2013: \$1,595,900	2009: \$32,349 2010: \$36,404 2011: \$37,955 2012: \$30,573 2013: \$43,132
<b>AMikids W.I.N.G.S. South Florida (Florida)</b>	AMikids WINGS (Women in Need of Greater Strength), incorporated in 2001 and closed in 2013, was a girls and babies residential program in Florida.	2009: 25 2010: 33 2011: 34 2012: 18 2013: 36	2009: \$1,423,870 2010: \$1,580,658 2011: \$1,560,596 2012: \$1,633,575 2013: \$1,655,794	2009: \$56,995 2010: \$47,899 2011: \$45,900 2012: \$90,754 2013: \$45,994
<b>AMikids YES (Florida)</b>	AMikids YES was incorporated in 1994 and has served over 900 youth. YES is a Florida DJJ residential program for boys ages 14-19 with Behavioral and/or Mental Health Overlay Service Needs (BHOS, MHOS).	2009: 40 2010: 51 2011: 45 2012: 37 2013: 54	2009: \$1,431,639 2010: \$1,455,198 2011: \$1,556,931 2012: \$1,721,846 2013: \$1,683,215	2009: \$35,791 2010: \$28,533 2011: \$34,598 2012: \$46,536 2013: \$31,170
<b>AMikids Acadiana (Louisiana)</b>	AMikids Acadiana, incorporated in 2007, is a Louisiana OJJ residential program for	2009: 57 2010: 67 2011: 68 2012: 72	2009: \$1,690,589 2010: \$1,787,860 2011: \$1,846,191 2012: \$1,878,559	2009: \$29,659 2010: \$26,684 2011: \$27,149 2012: \$26,091



Name of Program	Brief Description	Number of Clients Per Year	Total Annual Budget	Annual Cost Per Client
	male youth. AMikids Acadiana has served over 400 youth since opening.	2013: 78	2013: \$1,861,569	2013: \$23,866
<b>AMikids Beaufort (South Carolina)</b>	AMikids Beaufort, incorporated in 1985, is a South Carolina residential boys program.	2009: 77 2010: 100 2011: 97 2012: 100 2013: 89	2009: \$1,444,000 2010: \$1,362,888 2011: \$1,305,518 2012: \$1,347,969 2013: \$1,330,875	2009: \$18,753 2010: \$13,629 2011: \$13,459 2012: \$13,480 2013: \$14,954
<b>AMikids Bennettsville (South Carolina)</b>	AMikids Bennettsville, incorporated in 1996, is a South Carolina residential boys program.	2009: 91 2010: 114 2011: 108 2012: 100 2013: 101	2009: \$2,996,192 2010: \$1,560,950 2011: \$1,566,537 2012: \$1,394,882 2013: \$1,529,666	2009: \$32,925 2010: \$13,629 2011: \$14,505 2012: \$13,949 2013: \$15,145
<b>AMikids Georgetown (South Carolina)</b>	AMikids Georgetown, incorporated in 1989, is a South Carolina residential boys program	2009: 75 2010: 92 2011: 95 2012: 91 2013: 84	2009: \$1,394,659 2010: \$1,223,232 2011: \$1,212,035 2012: \$1,237,432 2013: \$1,314,594	2009: \$18,595 2010: \$13,297 2011: \$12,758 2012: \$13,598 2013: \$15,650
<b>AMikids Piedmont (South Carolina)</b>	AMikids Piedmont, incorporated in 1990, is a South Carolina residential boys program	2009: 79 2010: 92 2011: 105 2012: 106 2013: 88	2009: \$1,289,748 2010: \$1,243,709 2011: \$1,253,771 2012: \$1,248,333 2013: \$1,193,018	2009: \$16,326 2010: \$13,519 2011: \$11,941 2012: \$11,777 2013: \$13,557
<b>AMikids Sand Hills (South Carolina)</b>	AMikids Sand Hills, incorporated in 1996, is a South Carolina residential boys program.	2009: 93 2010: 124 2011: 114 2012: 105 2013: 101	2009: \$1,584,028 2010: \$1,472,062 2011: \$1,485,717 2012: \$1,358,129 2013: \$1,431,991	2009: \$17,033 2010: \$11,871 2011: \$13,033 2012: \$12,935 2013: \$14,178
<b>AMikids White Pines (South Carolina)</b>	AMikids White Pines, incorporated in 1990, is a South Carolina residential boys program.	2009: 84 2010: 107 2011: 117 2012: 107 2013: 94	2009: \$2,932,358 2010: \$2,817,787 2011: \$1,624,676 2012: \$1,413,772 2013: \$1,553,151	2009: \$34,909 2010: \$26,334 2011: \$13,886 2012: \$13,213 2013: \$16,523
<b>AMikids Rio Grande (Texas)</b>	AMikids Rio Grande, opened in 1986, has served over 1620 youth, is a Texas residential boys program.	2009: 58 2010: 39 2011: 29 2012: 32 2013: 34	2009: \$1,280,019 2010: \$1,110,721 2011: \$940,251 2012: \$1,107,861 2013: \$965,751	2009: \$22,069 2010: \$28,480 2011: \$32,422 2012: \$34,621 2013: \$28,404



## B. Administrative and Financial Capability

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### 4. Start-up Time

Georgetown Marine Institute has been successfully operated by AMKids since 1989 so there will be no lag time for start-up or enrollment of youth. In its 44-year history, AMKids, Inc. has overseen the **successful startup of over 50 different programs in 9 states**, starting from one program and expanding to include many different models throughout the country. AMKids has demonstrated understanding of the state, community and youth needs as well as successfully implementing the contracts and models awarded. Due to its 25 year history in effectively operating a staff secure Community Based Residential Services at Georgetown Marine Institute, AMKids' startup and implementation will provide an opportunity to enhance services already being provided. Wade Goss, AMKids, Inc. Regional Director will oversee the continuation of our quality programming and services. Wade and his implementation team (Michael Thornton, Director of Human Resources; Kim Hughes, Regional Director of Mental Health Services; LaTeesa Allen, Regional Education Director; Angee Hastings, Director of Training/Project Manager; Matt Frye, Director of Risk Management; Richard Hilton, Director of IT, Judy Estren, VP of Support Services; Heyward Golden, VP of Operations) have *extensive* Juvenile Justice and program experience.

AMKids Georgetown Marine Institute currently has the operating capacity to continue accepting referrals and clients throughout the RFP process and to continue to do so upon contract award. As evidenced by the organizational chart, AMKids Georgetown Marine Institute currently employs the needed positions to provide services as described without any startup delays. All current employees are trained to implement assigned services and all services as outlined in the RFP and the AMKids proposal response.



## Startup/Implementation Plan SITE/EQUIPMENT

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Identify/appoint functional committee for oversight of program startup</b>	VP of Operations	4/25/2014	4/23/2014	The Regional Director will oversee startup with the assistance of an identified AMKids, Inc. team	<ol style="list-style-type: none"><li>1. Team Lead – Regional Director – Wade Goss</li><li>2. Finance – Devon Simon, Mike Casas</li><li>3. Education – Phildra Swagger</li><li>4. Food Service – DeShawn Mason</li><li>5. Training – Angee Hastings</li><li>6. MH/SA/CM – Rosalyn Thomas</li><li>7. Medical/Health – Monica Nichols</li><li>8. Risk Management – Matt Frye</li><li>9. Research/Data – Dawn Jenkins</li><li>10. HR – Mike Thornton</li><li>11. IT – Richard Hilton</li><li>12. Facility – Matt Frye, Wendell Watson</li><li>13. Legal – Judy Estren</li></ol>
<b>Site and Equipment</b> *see individual sections for more specific tasks					
<b>RFP Site Visit</b>	Regional Director	4/30/2014	4/30/2014	Regional Director will assign individual to conduct site visit	No official site visit needed due to AMKids running all

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
				and complete site visit checklist	sites being bid on.
<b>Schedule Comprehensive Facility Site Visit</b>	Regional Director	4/30/2014	4/30/2014	Regional Director will work with DJJ to schedule a comprehensive walk through to determine all facility and equipment needs.	No official site visit needed due to AMKids running all sites being bid on.
<b>Startup Team Comprehensive Facility Site Visit</b>	Startup Team	N/A	N/A	Team will complete the walk through the day after award to determine needs for comprehensive facility plan.	Not applicable due to AMKids currently running sites.
<b>Comprehensive Facility Plan Startup Meeting</b>	Regional Director	N/A	N/A	Arrange meeting immediately following scheduling of walk through to review entire Facility Plan	Not applicable due to AMKids currently running sites
<b>Schedule required inspections</b>	Regional Director	N/A	Complete	Coordinate with all parties for the inspections required	All inspections are up to date.
<b>Utility Vendor Identification</b>	Miami-Dade BM	N/A	Complete	1. Phone 2. Cell phone 3. Water 4. Sewage 5. Power 6. Internet, etc.	All vendors identified and currently being utilized.
<b>Establish utility connections and accounts</b>	Regional Director, Erate coordinator, IT department	N/A	Complete	Coordinate all needed connections and involve all pertinent parties	All connections active
<b>Inventory all equipment</b>	Regional Director, IT, Support Services	N/A	Complete	Inventory all equipment and coordinate with all parties the ordering of additional equipment needed	All equipment inventory is kept up to date by current programs
<b>Identify vendors for</b>	Regional Director	N/A	Complete		All vendors identified and

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
needed repairs (use minority vendors when available)					currently being utilized.
Vehicle Requirements	Regional Director, Risk Management	N/A	Complete	Identify vehicles to be used. Complete inspection. Purchase new vehicles if needed	Programs have established vehicles and vendors

## Timeline/Implementation Schedule

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Staffing/Human Resources</b>					
Verify job descriptions	Dir. Of HR	5/15/2014	5/15/2014		All job descriptions verified and up to date.
Evaluate internal candidacy pool.	Dir. Of HR, Dir. Of Training	5/10/2014	Complete	<ol style="list-style-type: none"> <li>1. Assess internal candidates.</li> <li>2. AMKids Leadership University candidates will be assessed for possible leadership positions at the new program. A symposium is scheduled for Sept. 27-28.</li> <li>3. Discuss potential opportunities with current EDs, etc.</li> </ol>	All positions are currently filled.
Post positions internally.	Dir. Of HR	5/10/2014	Complete	Immediately upon notification of award the HR department will post all open	All positions currently filled

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
				positions internally and externally.	
<b>Post positions externally</b>	Dir. Of HR	5/10/2013	Complete	Positions posted externally on the following resources...	All positions currently filled
<b>Schedule comprehensive interviews for leadership and MH position.</b>	Dir. Of HR and Dir. Of MH Services	N/A	Complete		All leadership positions filled.
<b>Schedule comprehensive interviews for all positions.</b>	Dir. Of HR, ED, and Regional Dir. Of MH services	N/A	Complete	Interviews will be scheduled as soon as resumes are received.	All leadership positions currently filled
<b>Order Drug Testing Supplies</b>	Risk Management	N/A	Complete		Programs have supplies for any new hires.
<b>Identify candidate for each position</b>	Dir. Of HR, ED, Regional Dir. Of MH Services, NSLP Coordinator	5/30/2014	Complete		All positions currently filled
<b>Vocational services</b>	VP Support Services, Regional Director	5.15.2014	Complete	Identify any outside vocational contractors or needs.	All vocational services are currently being provided.
<b>New hire paperwork completion</b>	Dir. Of HR	As employees hired	N/A		All positions filled. This process continues through turnover and all new hires.
<b>Employee benefit orientation</b>	Risk Management/ Benefits	As employees hired	N/A		All positions filled and a Benefits training was held during open enrollment this year.

## Startup/Implementation Plan ACCOUNTS

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Accounts</b>					
<b>Identify financial institution</b>	ED/ Accountant	6/1/2014	Complete		Programs already have identified banks
<b>Set up financial accounts</b>	Regional Director/ Accountant	Upon Award	Complete		Accounts established
<b>Identify vendors</b>	ED/ Regional Director	6/1/2014	Complete		Vendors identified and being utilized
<b>Identify other vendors</b>	Regional Director/ ED	As needed	Complete		All vendors identified and being utilized
<b>Set up vendor accounts</b>	Regional Director/ED	Upon award	Complete		All vendor accounts set up

## Startup/Implementation Plan

### OTHER CONTRACTS

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Contracts and Licenses</b>					
<b>School District</b>	Reg. Dir. Of Education	Upon Award	Complete	Schedule initial meeting with school district after award to discuss contract and guidelines  Negotiate/Sign contracts with local school district	Already providing educational services at all site locations.
<b>Establish contact with UW</b>	Regional Director/ ED	1 month after Award	Complete		Contacts already established in the local community.
<b>Establish contact with local Workforce Board</b>	Regional Director/ Dir. Of Ed.	1 month after Award	Complete		Programs all currently utilizing local WIA agencies.
<b>Establish contact with community providers</b>	ED	Immediately upon award	Complete		All programs have established community support agencies.



## Startup/Implementation Plan

### CASE MANAGEMENT

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Case Management</b>					
<b>Assign a mentor to HSP Dept. for new HSPs and/or new programs</b>	Regional Director of MH Services/Regional Director	N/A	Complete		All programs have established and trained HSPs.
<b>Develop needed forms and sample book/file</b>	Mentor	N/A	Complete		All programs have established forms and systems.
<b>Create 10 case files ready for new youth</b>	Mentor/HSP	N/A	Complete	Put together case files to ensure the program is ready to accept new youth.	All programs have established youth, forms and systems.
<b>Organize office, files, calendars, etc.</b>	AMKids/ ED/ Business Manager	N/A	Complete		Program systems are established.
<b>Organize and set up needed space for groups/treatment teams, etc.</b>	Mentor/HSP	N/A	Complete		Programs have established space.
<b>Organize treatment team schedules, CM schedules, reminders, etc.</b>	Mentor/HSP	Upon Award	Complete	Establish new schedules if needed upon contract changes or award	Programs have established schedules which will be reviewed upon award to ensure all activities match new program outline.
<b>Review Contract requirements, QI</b>	Mentor/Regional Dir. Of MH	Upon Award		Review any new requirements with all	Programs have established systems, but

requirements, etc. and provide a copy to new personnel				personnel upon award	any new items from the RFP will be reviewed.
Introduce new personnel to contract monitor, commitment manager, etc.	Mentor/ Regional Director	Immediately upon new hires	Complete		All personnel are established in the community and with JJ agency officials.
Provide program a list of resources, contacts in the community	Mentor	10 days after award	Complete		Programs have established community connections.

## Startup/Implementation Plan

### EDUCATION/VOCATION

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Education/Vocation (School Board Providing Education)</b>					
Contact SCDJJ/School Board for personnel assigned, space needed, and start date, etc.	DJJ/ AMIkids	Immediately upon award	Complete		Program established.
Create exciting learning environment in classrooms	ED/Regional Director of Education	15 days after award	Complete		All learning environments established.
Assist with setting up classrooms, gathering supplies, books, etc.	ED/Regional Director of Education	15 days after award	Complete		All classrooms set up and supplies available.



## Startup/Implementation Plan

### BRANDING

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Branding</b>					
<b>Establish program name and logo</b>	DJJ/ AMIkids	Upon award	Complete		Program names and logos established
<b>Establish signage</b>	AMIkids	Upon Award	Complete		Programs already have signage.
<b>Identify vendor for cards/letterhead</b>	BM/ Regional Director	2 weeks after award	Complete		Programs have all materials needed.
<b>Order business cards and letterhead</b>	AMIkids/ ED/ Business Manager	2 weeks after award	Complete		Programs have all materials needed.

## Startup/Implementation Plan TRAINING

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Training</b>					
<b>Develop program specific new hire training plan to include dates of upcoming trainings.</b>	Dir. Of Training/ Dir. Of Ed./ Dir. Of MH	5/15/2014	Complete		No new trainings required.
<b>Staff Orientation training</b>	Dir of Training	Upon hire	Complete		No new trainings required. New hire training will be ongoing if turnover occurs.
<b>The Council Training</b>	Dir. Of Training	Upon hire	Complete		All programs offering The Council have trained personnel.
<b>ART Training</b>	Dir. Of Training	Upon hire	Complete		All programs have trained ART personnel
<b>TF-CBT</b>	Dir. Of Training	Upon hire	Complete		All programs offered TF-CBT have trained personnel.
<b>Send new staff to Kids First University or hold a KFU at the facility prior to startup.</b>	Dir. Of Training	As available upon hire	Complete		All program staff are employed. Any new staff brought on board will have this opportunity.
<b>Identify and schedule trainers and dates for CPR/FA/AED.</b>	Dir. Of Training	Upon Hire	Complete		All staff are currently employed and trained.
<b>Identify and schedule trainers and dates for CPI.</b>	Dir of Training	Upon Hire	Complete		All staff are trained and in compliance.
<b>Train management to assist with medication self-admin</b>	Nurse, ED	Upon Hire	Complete		Staff distributing meds are trained as per requirements.

<b>and policies</b>					
<b>Send experienced ED, BM, Dir. Of Txt, DO to program</b>	Dir. Of Training/ HR	immediately upon hire	N/A		All program leadership is experienced.
<b>Casey Life Skills Training (online training module)</b>	Dir. Of Ed/ ED	Immediately upon hire	Complete		Staff utilizing Casey are all trained.

# Startup/Implementation Plan

## Operations

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Operations</b>					
<b>Develop program specific Behavior Modification Systems (point cards, rank boards, CAP charts, token economy, etc.</b>	Dir. Of Training/ Regional Director/ ED	Prior to start date	Complete		All systems established and used.
<b>Develop student handbook and orientation materials</b>	ED/ Regional Director	3 weeks after award date	Complete		All systems established and used.
<b>Develop/modify schedule</b>	ED/ Dir. Of Ed./ Dir. Of MH	Upon award	Complete		Schedules are developed but will be reviewed upon award to ensure compliance with new contract.
<b>Organize student transportation systems</b>	ED/ Risk Management	4 weeks after award	Complete		Program has established system
<b>Develop Treatment Systems (group counseling, file systems, etc.</b>	ED/ Dir. Of MH	4 weeks after award	Complete		Program has established systems.
<b>Identify vendor for uniforms for students and staff</b>	ED/ Regional Director	4 weeks after award	Complete		All uniforms purchased.
<b>Order uniforms for students and staff</b>	ED/ Regional Director	4 weeks after award	Complete		All uniforms purchased.
<b>Obtain D &amp; O/ EPL insurance coverage (as of date of incorporation)</b>	Risk Management/ ED	Upon hire of first employee	Complete		
<b>Obtain GL/Excess insurance coverage (in place as of date of</b>	Risk Management/	Upon incorporation	Complete		

<b>incorporation)</b>	ED				
<b>Obtain WC insurance coverage (date of hire of first employee)</b>	Risk Management/ ED	Upon hire of first employee	Complete		
<b>Obtain student accident insurance</b>	Risk Management/ ED	Upon award	Complete		
<b>Obtain auto insurance on transferred and new vehicles (as of date of transferred vehicles and/or first employee hire)</b>	Risk Management/ ED	Upon Award	Complete		
<b>Obtain Property/Contents Insurance (as of date we become responsible for building)</b>	Risk Management/ ED	Upon Award	Complete		
<b>Obtain Certificate of insurance to school on placement coverage</b>	Risk Management/ ED	Upon Award	Complete		
<b>Identify and obtain additional coverage if needed</b>	Risk Management/ ED	Upon Award	Complete		
<b>Develop Policy and Procedures</b>	Regional Director/ Dept. Heads	4 weeks after award	Complete		Programs have established procedures, but they will be reviewed upon award.
<b>Organize motor vehicle registration for new staff</b>	Regional Director/ ED	Upon hire	Complete		All current staff are complete.
<b>Schedule key program staff to AMKids, Inc. offices</b>	Regional Director	Upon hire	Complete		All staff are established and experienced AMKids staff.
<b>Add new program to directory</b>	Office Manager	Upon Award	Complete		
<b>Create a coverage schedule including all hired program staff and utilizing staff from</b>	Regional Director	2 weeks after award	Complete		All programs have coverage schedules, but this will be reviewed upon contract

other local programs to assist in emergency situations.					award.
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## Startup/Implementation Plan

### COMMUNICATION

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Communication</b>					
<b>Educate local contacts (DJJ, Juvenile Justice Council, Judges, Mayor, Commissioners, School Board, JPOs, Law Enforcement, Judges, etc.) of program startup and goals</b>	Regional Director/ ED	6 weeks after award	Complete		Program is established in the community. If any significant changes come out of RFP process, the programs will educate all needed parties.
<b>Schedule friend-building/open house</b>	ED	1 month after startup with clients	N/A		All programs are established
<b>Issue press release</b>	AMikids PR	Upon Award			
<b>Establish contacts with voc. And tech. schools</b>	ED/ mentor	Prior to Startup Date	Complete		Contacts established.
<b>Identify Key Players in the community for board members</b>	ED/ VP Resource Development	4 weeks after award	Complete		All programs have active board members.
<b>Hold Board Meeting to introduce new team, educate board members on the new program and provide a tour of the facility.</b>	ED/ Regional Director	1 month after award			Upon award, the Board will meet to discuss changes



Identify potential local donors	VP Resource Development/ ED	Ongoing			The programs are established in the community, however fund and friend raising is an ongoing AMKids goal.



## Startup/Implementation Plan

### FINANCES

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Finances</b>					
<b>Copies of final budget to new ED/BM</b>	Accountant/ Regional Director	Upon ED/BM hire	5/15/2014		RFP budgets developed in concert with ED, BM and AMKids.
<b>Identify accountant, set up payroll and accounting records, order checks</b>	Accounting Dept.	Complete	Complete		
<b>Get AMKids/Program Sub-Contract Signed</b>	Accounting/ Support Services	Upon ED hire	Complete		
<b>Provide 501c-3</b>	Accounting	Upon Award and filing	Complete		
<b>Complete forms for franchise tax, tangible and intangible property tax, etc. if needed</b>	ED/ Accounting	Upon Award	Complete		
<b>Establish state tax exempt and federal ID</b>	ED/ Accounting	Upon Award	Complete		

## Startup/Implementation Plan

### IT

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>IT</b>					
<b>Complete comprehensive evaluation of IT infrastructure and needs during walk through</b>	IT lead	During scheduled walk through	Complete		AMikids currently operates the sites bid on.
<b>ISP with Dynamic IP address</b>	IT lead	1 week after award	Complete		
<b>Install on server and email</b>	IT lead	1 week after award	Complete		
<b>Install AMikids systems and give user permissions</b>	IT lead/ Director of Data Management	Upon hire	Complete		
<b>Identify local computer support</b>	IT lead	5/15/2014	Complete		Established vendors and support.
<b>Establish Erate requirements</b>	Erate Coordinator	3 weeks after award	Complete		All programs currently receiving erate support



## Startup/Implementation Plan

### HEALTH SERVICES

Posting of Decision: February 5, 2014

Execution Date: March 1, 2014

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>HEALTH SERVICES</b>					
Identify Health Services Partnerships/Contracting Agencies	Regional Director	Prior to 1 <sup>st</sup> client	Complete		All community partnerships established.
Identify program mentor for health services	Regional Director/ VP of Operations	N/A	N/A		
Identify local hospital for emergency care	Regional Director	Prior to 1 <sup>st</sup> client	Complete		
Identify local Dentist for regular and emergency dental care	Regional Director	Prior to 1 <sup>st</sup> client	Complete		
Identify program space for routine medical and Med management	Regional/Executive Director	Upon facility walk through	Complete		
Establish medication storage areas and policy	Regional Director/ Medical Staff	4 weeks after award	Complete		
Establish medical/health services policies and procedures	Regional Director/ Medical Staff/ Medical Mentor	4 weeks after award	Complete		
Establish filing systems	Medical Staff/ Medical Mentor	2 weeks after award	Complete		
Identify vendor for other health	Regional Director	3 weeks	Complete		

<b>services needs</b>		after award			
<b>Establish contract with vendor</b>	BM	4 weeks after award	Complete		
<b>Purchase all needed materials</b>	BM	4 weeks after award	Complete		
<b>Establish sick call procedures/forms</b>	ED	Prior to 1 <sup>st</sup> client	Complete		
<b>Establish medication procedures/forms</b>	ED/AMKids Nurse	Prior to 1 <sup>st</sup> Client	Complete		



## Startup/Implementation Plan HSP/MENTAL HEALTH/ SUBSTANCE ABUSE SERVICES

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>CLINICAL TREATMENT MENTAL HEALTH/SUBSTANCE ABUSE SERVICES</b>					
<b>Identify Mental Health Services Partnerships/Contracting Agencies</b>	Regional Director/ED	5/15/2014	Complete		Established partnerships
<b>Identify program mentor for mental health services</b>	Regional Director/ VP of Operations	5/20/2013	Complete		
<b>Identify local hospital for emergency care</b>	Regional Director	5/30/2014	Complete		
<b>Provide MH staff with all fidelity instruments and practices</b>	Regional Director of MH Services	Upon Award	Complete		
<b>Identify program space for mental health treatment/groups and counseling</b>	Regional/Executive Director	Upon walk though	Complete		
<b>Establish medication storage areas and policy</b>	Regional Director/ MH Staff	Prior to 1 <sup>st</sup> client	Complete		
<b>Establish filing systems</b>	MH Staff/ MH Mentor	2 weeks after award	Complete		
<b>Train staff in all EBP practices</b>	Director of Training	Upon hire	Complete		All personnel trained in EBP practices currently running at the programs.
<b>Assign fidelity mentors to new personnel.</b>	Regional Dir. Of MH Services	Upon hire	Complete		



## Startup/Implementation Plan

### DELINQUENCY INTERVENTIONS

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>Delinquency Interventions – Restorative Justice</b>					
Identify Community Service Locations	ED	5/22/2014	Complete		Programs currently providing services in the community.
Identify Service from the Heart Locations	Regional Director/ VP of Operations	6/15/2014	Complete		Program currently providing these services
Establish Student Council guidelines, requirements, meeting dates, etc.	Director of Training	5/22/2014	Complete		Programs offering student or youth councils.
Identify staff to run Student Council	ED	Upon hire/award	Complete		
Post Student Council sign up and information around program.	Regional/Executive Director	1 month after start date	Complete		
Train employees on off campus/community service procedures.	Dir of Training	Upon hire	Complete		
Train employees on requirements for AMikids Signature Events and determine which events the program will participate in.	ED/Dir. Of Training	Upon hire	Complete		
<b>Delinquency Interventions – EBP/Promising Practices</b>					
Train all appropriate	Regional Dir. Of MH	Upon hire	Complete		All programs have staff

employees on EBP/Promising Practices	Services				currently employed who are trained in EB practices offered.
<b>The Council</b>	Regional Dir. Of MH Services	Upon Hire	Complete		If providing council, staff are already trained.
<b>ART</b>	Dir of MH Services	Upon Hire	Complete		
<b>TF-CBT</b>	Dir. Of MH Services	Upon Hire	Complete		

## Startup/Implementation Plan

### FOOD SERVICE

Task	Responsible Parties	Target Date	Completion Date	Notes	Progress
<b>FOOD SERVICE</b>					
<b>Locate and negotiate with food vendors</b>	NSLP Director/ Regional Director	Upon award	Complete		Already providing food services with established vendors.
<b>Identify dietician</b>	NSLP Director	5/15/2014	5/1/2014		
<b>Train Food Services Staff to provide ServSafe</b>	NSLP Director	Upon hire	Complete		All programs have staff trained
<b>Order kitchen materials</b>	NSLP Director/Food Service Personnel	Upon award	Complete		
<b>Contract with food vendor</b>	NSLP Director/Food Service Personnel	Upon Award	Complete		
<b>Create menus for program</b>	NSLP Director/Food Service Personnel	5/15/2014	Complete		
<b>Create dining/food service allergy list</b>	NSLP Director/Food Service Personnel	Upon intake of clients	Complete		Ongoing with new client intakes.
<b>Create food service policies and procedures</b>	NSLP Director/Food Service	5/15/2014	Complete		
<b>Train new food service employees on utensil safety procedures</b>	NSLP Director	Upon hire	Complete		

## B. Administrative and Financial Capability

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### 5. Evaluation of Program Effectiveness and Outcomes.

AMKids, Inc. has operated some of the most effective Juvenile Justice programs in the county. AMKids contracts with an external evaluator, the Justice Research Center, to independently measure objective outputs and outcomes for each of its programs and services. This is done to advance the quality of the programming offered to youth and stakeholders and to ensure fidelity to the AMKids Personal Growth Model® (APGM®). The reports track youth released for programs two (2) calendar years prior through the end of the following calendar year to track subsequent juvenile justice system involvement. The following report information is for youth released from AMKids programs in calendar year (CY) 2011, allowing for a 12-month follow-up period ending in December 2012. While recidivism is the primary outcome measured in this report, youth characteristics, rates of completion, average lengths of service and educational performance were also examined. The following is a list of key findings from the AMKids 2013 Outputs & Outcomes Report for the AMKids, Inc. family of programs:

- Despite serving a higher risk population, the majority of youth entering AMKids community based and residential delinquency programs successfully completed services. In 2011, 74% of youth sanctioned to an AMKids community-based program completed services, increasing from 70% in FY 2005-06.
- AMKids has increased the efficiency of programming in recent years, with average lengths of service decreasing for both its community-based and residential delinquency interventions. Six years ago, it took an average of 197 days for youth to complete AMKids standard residential programs. This compares to an average of 168 days (5.6 months) in 2011.
- In 2011, AMKids delinquency programs admitted a higher risk population of youth who completed programming faster than their counterparts six years ago, yet still achieved relatively low rates of recidivism.
- Only 20% of youth completing AMKids community-based programs were subsequently adjudicated for a law violation and less than one-quarter (21%) of the higher risk youth who completed residential programming were re-adjudicated for a criminal offense within 12 months of release.
- Recidivism rates, including both law and non-law violations, for youth completing AMKids residential delinquency programs dropped 15%, or four percentage points, from 31% in FY 2005-05 to 27% in 2011.
- Educational programming is a cornerstone of all AMKids services. In 2011, the average grade level equivalent (GLE) of youth completing community-based and residential juvenile justice programs increased by more than one letter grade in math, reading and writing over the course of program services.
- A total of 169 youth earned their GEDs while being served in an AMKids delinquency program. On average, youth completing community-based interventions earned 4.4



high school credits, while those successfully graduating from residential programs earned an average of 4.0 credits.

- AMIkids operated four Infinity Schools that provided alternative educational services for 175 at-risk youth in 2011. Seventy-eight percent of these students successfully graduated from the program, with average math, reading and writing GLEs improving over the course of instruction.
- AMIkids provided Infinity services educational programming in the Brevard Group Treatment Home and Frances Walker Halfway House in 2011, with ninety-eight percent of the youth successfully completing services. On average math, reading and writing GLEs improved over the course of instruction for these students with reading GLEs increasing by more than 2 grade levels.

In the following pages, the summaries of evaluations for programs currently operating, which are similar to this program, are provided and the complete evaluation report can be found on the AMIkids webpage, [www.amikids.org](http://www.amikids.org).

## AMkids Acadiana

611 Celestine La Tortue  
Road  
Branch, LA 70516  
Phone: (337) 334-4838

Residential

AMkids Acadiana is located in Branch, Louisiana. In calendar year 2011, 73 youth were released from the program. Among these youth, 56 (77%) completed favorably. Youth stayed on average 29 weeks. Of the youth released, 100% were male and 89% were minorities. The average age at enrollment was 15.4 years.

## Program Measures

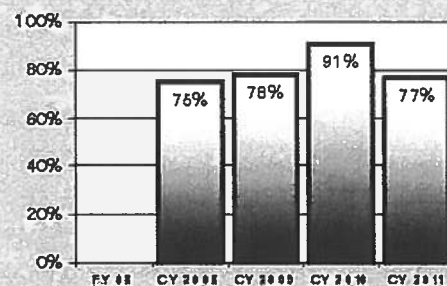
### Client Service Days

Budgeted Slots:  
12,404  
Actual Slots:  
10,751  
Slot Difference:  
-1,653

### Completion Measures

<b>Favorable</b>	<b>77%</b>
<b>Unfavorable</b>	<b>23%</b>
<b>Youth Released</b>	<b>73</b>
<b>Favorable Completions<sup>1</sup></b>	<b>56</b>

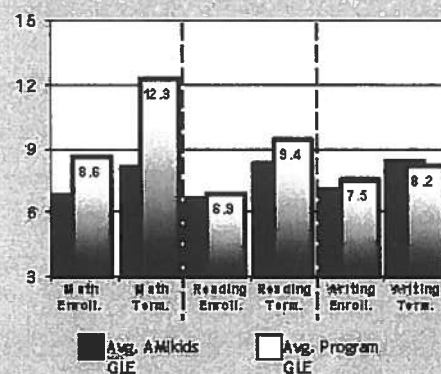
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	<i>At Enrollment (N)</i>	<i>At Termination (N)</i>
<b>Avg. Math GLE<sup>3</sup></b>	<b>8.6 (42)</b>	<b>12.3 (42)</b>
<b>Avg. Reading GLE</b>	<b>6.9 (43)</b>	<b>9.4 (43)</b>
<b>Avg. Writing GLE</b>	<b>7.5 (42)</b>	<b>8.2 (42)</b>
<b>Avg. High School Credits</b>		<b>2.9 (15)</b>
<b>Avg. College Credits Earned</b>		<b>n/a</b>
<b>Total GEDs Earned</b>		<b>0</b>

### Grade Level Equivalence Scores:



## Youth Demographics

### Gender

% Male	100%
% Female	0%

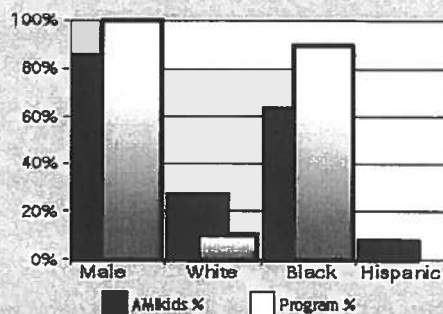
### Average Age

At Enrollment	15.4
At Termination	16.0

### Race/Ethnicity<sup>4</sup>

% White	11%
% Black	89%
% Hispanic	0%
% Other	0%

Demographic Percentages:



## Prior Offense History Summary

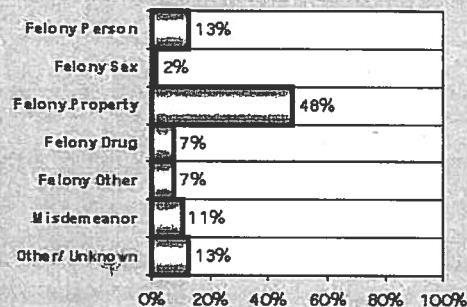
Percent With a Prior Offense: 100%<sup>N=5</sup>

Average Age at First Offense: 14.0

Average # of Prior Arrests: 2.3

Average # of Prior Convictions: 8.0

Most Serious Prior Offense:<sup>4</sup>



## Program Performance

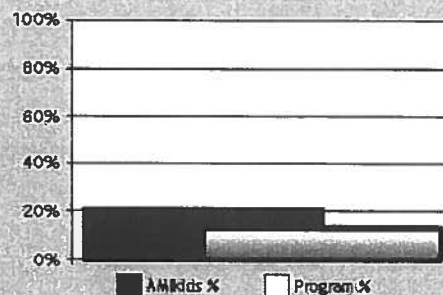
Juvenile Recidivism (2011): 13%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): 100%

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

Recidivism Comparison:



## AMkids Beaufort

60 Honeybee Island Rd  
Seabrook, SC 29940  
Phone: (843) 846-2128

Residential

AMkids Beaufort is located in Seabrook, South Carolina. In calendar year 2011, 93 youth were released from the program. Among these youth, 91 (98%) completed favorably. Youth stayed on average 15 weeks. Of the youth released, 100% were male and 73% were minorities. The average age at enrollment was 16.4 years.

## Program Measures

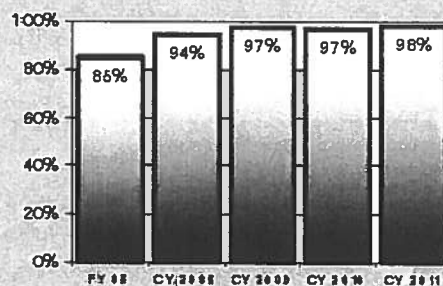
### Client Service Days

Budgeted Slots: 11,680  
Actual Slots: 10,333  
Slot Difference: -1,347

### Completion Measures

<b>Favorable</b>	<b>98%</b>
<b>Unfavorable</b>	<b>2%</b>
<b>Youth Released</b>	<b>93</b>
<b>Favorable Completions<sup>1</sup></b>	<b>91</b>

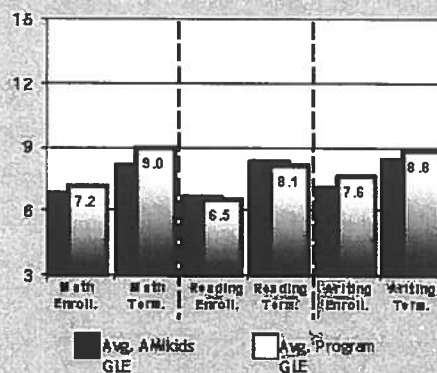
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	<i>At Enrollment (N)</i>	<i>At Termination (N)</i>
<b>Avg. Math GLE<sup>3</sup></b>	<b>7.2 (89)</b>	<b>9.0 (89)</b>
<b>Avg. Reading GLE</b>	<b>6.5 (89)</b>	<b>8.1 (89)</b>
<b>Avg. Writing GLE</b>	<b>7.6 (89)</b>	<b>8.8 (89)</b>
<b>Avg. High School Credits</b>		<b>2.5 (62)</b>
<b>Avg. College Credits Earned</b>		<b>n/a</b>
<b>Total GEDs Earned</b>		<b>14</b>

### Grade Level Equivalence Scores:



## AMkids Beaufort

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

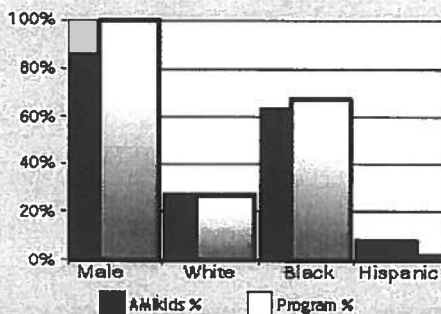
#### Average Age

At Enrollment	16.4
At Termination	16.7

#### Race/Ethnicity<sup>4</sup>

% White	27%
% Black	67%
% Hispanic	2%
% Other	3%

#### Demographic Percentages:



### Prior Offense History Summary

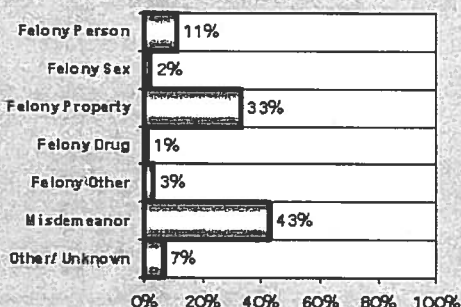
Percent With a Prior Offense: 100%<sup>N=91</sup>

Average Age at First Offense: 13.8

Average # of Prior Arrests: 4.6

Average # of Prior Convictions: 3.4

#### Most Serious Prior Offense:<sup>4</sup>



### Program Performance

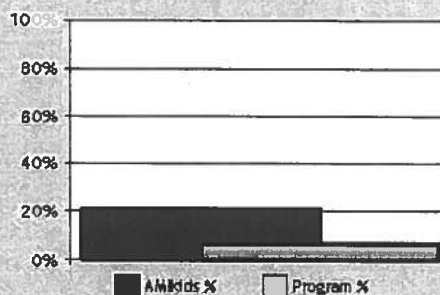
Juvenile Recidivism (2011): 7%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

#### Recidivism Comparison:



## AMKids Big Cypress

25959 Turner River Road  
Ochopee, FL 34141  
Phone: (239) 695-1001

Residential

AMKids Big Cypress is located in Ochopee, Florida. In calendar year 2011, 50 youth were released from the program. Among these youth, 50 (100%) completed favorably. Youth stayed on average 29 weeks. Of the youth released, 100% were male and 96% were minorities. The average age at enrollment was 16.4 years.

### Program Measures

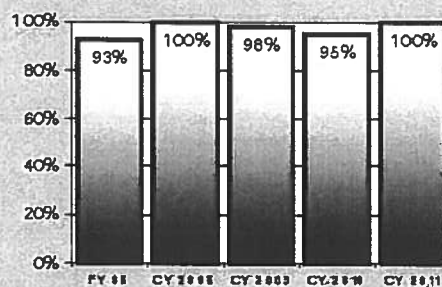
#### Client Service Days

Budgeted Slots: 12,775  
Actual Slots: 10,829  
Slot Difference: -1,946

#### Completion Measures

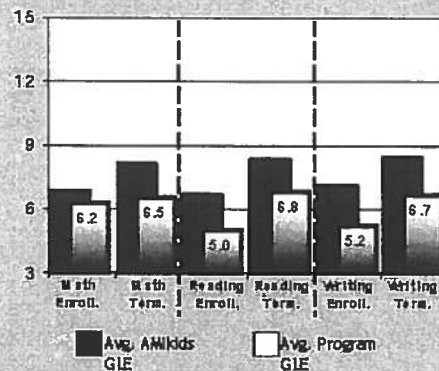
<b>Favorable</b>	<b>100%</b>
<b>Unfavorable</b>	<b>0%</b>
<b>Youth Released</b>	<b>50</b>
<b>Favorable Completions<sup>1</sup></b>	<b>50</b>

#### Completion Rates by Year:



Educational Performance <sup>2</sup>	At Enrollment (N)	At Termination (N)
Avg. Math GLE <sup>3</sup>	6.2 (38)	6.5 (38)
Avg. Reading GLE	5.0 (38)	6.8 (38)
Avg. Writing GLE	5.2 (38)	6.7 (38)
Avg. High School Credits		7.1 (47)
Avg. College Credits Earned		n/a
Total GEDs Earned		0

#### Grade Level Equivalence Scores:



## AMKids Big Cypress

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

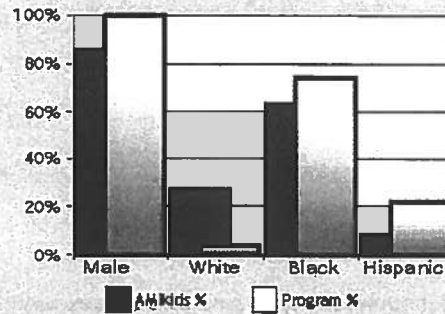
#### Average Age

At Enrollment	16.4
At Termination	17.0

#### Race/Ethnicity<sup>4</sup>

% White	4%
% Black	74%
% Hispanic	22%
% Other	0%

Demographic Percentages:



### Prior Offense History Summary

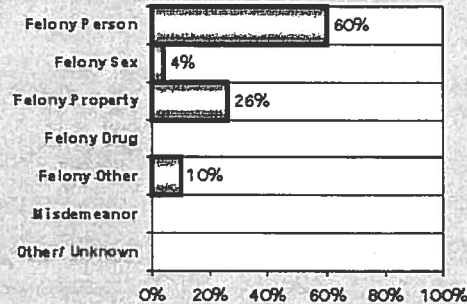
Percent With a Prior Offense: 100%<sup>N=50</sup>

Average Age at First Offense: 13.6

Average # of Prior Arrests: 11.3

Average # of Prior Convictions: 9.3

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

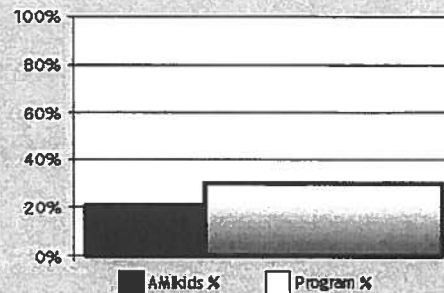
Juvenile Recidivism (2011): 30%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

QI Score (2012): 79%

Note: QI score: Overall measure of program performance and quality of provided service through a five-day peer review process. Similar to school grade scores, 90%-100% indicates exceptional performance and scores below 80% indicate failure to meet minimum standards.

Recidivism Comparison:



## AMKids Bennettsville

620 Marlboro Rd  
Bennettsville, SC 29512  
Phone: (843) 479-0420

Residential

AMKids Bennettsville is located in Bennettsville, South Carolina. In calendar year 2011, 106 youth were released from the program. Among these youth, 104 (98%) completed favorably. Youth stayed on average 18 weeks. Of the youth released, 100% were male and 80% were minorities. The average age at enrollment was 16.7 years.

### Program Measures

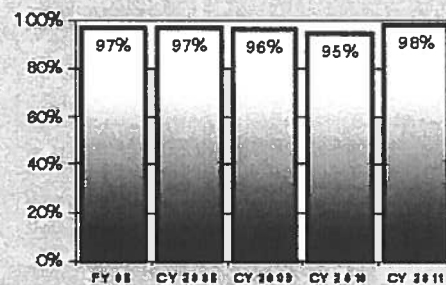
#### Client Service Days

Budgeted Slots: 14,600  
Actual Slots: 13,360  
Slot Difference: -1,240

#### Completion Measures

<b>Favorable</b>	<b>98%</b>
<b>Unfavorable</b>	<b>2%</b>
<b>Youth Released</b>	<b>106</b>
<b>Favorable Completions<sup>1</sup></b>	<b>104</b>

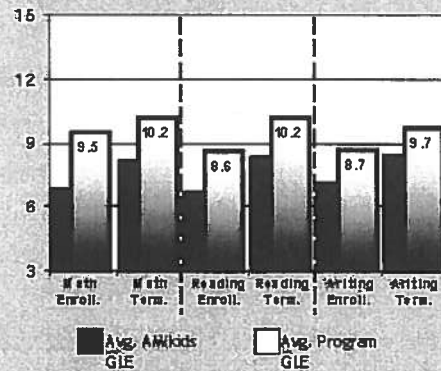
#### Completion Rates by Year:



#### Educational Performance<sup>2</sup>

	<sup>At</sup> Enrollment (N)	<sup>At</sup> Termination (N)
<b>Avg. Math GLE<sup>3</sup></b>	<b>9.5 (86)</b>	<b>10.2 (86)</b>
<b>Avg. Reading GLE</b>	<b>8.6 (86)</b>	<b>10.2 (86)</b>
<b>Avg. Writing GLE</b>	<b>8.7 (86)</b>	<b>9.7 (86)</b>
<b>Avg. High School Credits</b>		<b>3.4 (47)</b>
<b>Avg. College Credits Earned</b>		<b>4.5 (2)</b>
<b>Total GEDs Earned</b>		<b>7</b>

#### Grade Level Equivalence Scores:

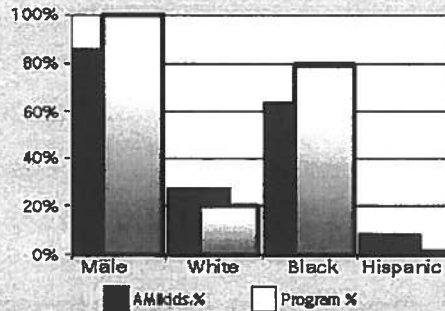


## AMikids Bennettsville

### Youth Demographics

Gender		Race/Ethnicity <sup>4</sup>	
% Male	100%	% White	20%
% Female	0%	% Black	79%
Average Age		% Hispanic	1%
		% Other	0%
At Enrollment	16.7		
At Termination	17.1		

Demographic Percentages:



### Prior Offense History Summary

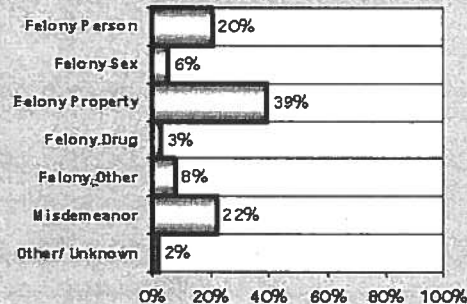
Percent With a Prior Offense: 100%<sup>N=104</sup>

Average Age at First Offense: 13.5

Average # of Prior Arrests: 5.6

Average # of Prior Convictions: 5.2

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

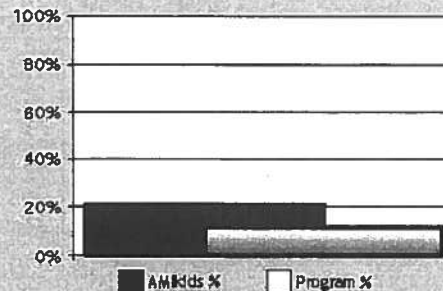
Juvenile Recidivism (2011): 12%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

Recidivism Comparison:



## AMKids Georgetown

Hwy 17 S 1590 East CCC  
Road  
Georgetown, SC 29440  
Phone: (843) 546-5478

Residential

AMKids Georgetown is located in Georgetown, South Carolina. In calendar year 2011, 91 youth were released from the program. Among these youth, 91 (100%) completed favorably. Youth stayed on average 18 weeks. Of the youth released, 100% were male and 76% were minorities. The average age at enrollment was 14.8 years.

## Program Measures

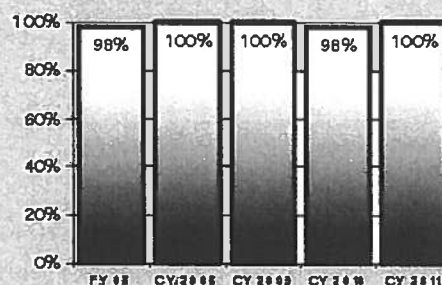
### Client Service Days

Budgeted Slots:  
12,410  
Actual Slots:  
11,554  
Slot Difference:  
-856

### Completion Measures

<b>Favorable</b>	<b>100%</b>
<b>Unfavorable</b>	<b>0%</b>
<b>Youth Released</b>	<b>91</b>
<b>Favorable Completions<sup>1</sup></b>	<b>91</b>

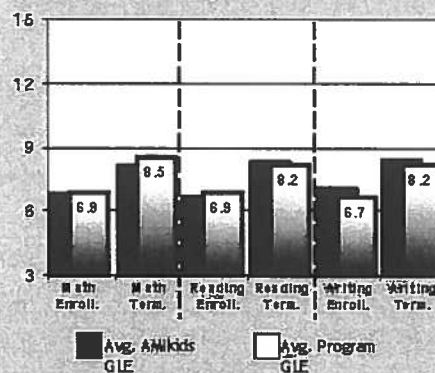
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
<b>Avg. Math GLE<sup>3</sup></b>	<b>6.9 (89)</b>	<b>8.5 (89)</b>
<b>Avg. Reading GLE</b>	<b>6.9 (89)</b>	<b>8.2 (89)</b>
<b>Avg. Writing GLE</b>	<b>6.7 (89)</b>	<b>8.2 (89)</b>
<b>Avg. High School Credits</b>		<b>2.0 (23)</b>
<b>Avg. College Credits Earned</b>		<b>n/a</b>
<b>Total GEDs Earned</b>		<b>0</b>

### Grade Level Equivalence Scores:



## AMikids Georgetown

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

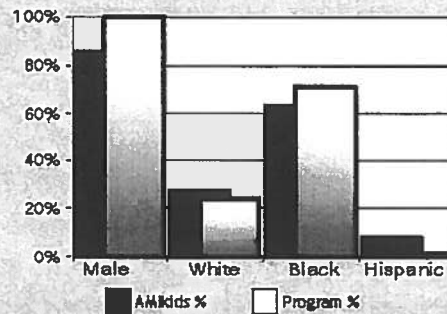
#### Average Age

At Enrollment	14.8
At Termination	15.1

#### Race/Ethnicity<sup>4</sup>

% White	24%
% Black	71%
% Hispanic	1%
% Other	3%

#### Demographic Percentages:



### Prior Offense History Summary

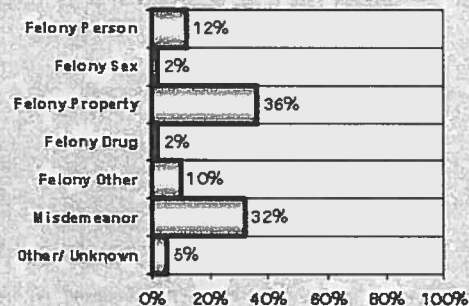
Percent With a Prior Offense: 100%<sup>N=91</sup>

Average Age at First Offense: 12.9

Average # of Prior Arrests: 4.6

Average # of Prior Convictions: 3.5

#### Most Serious Prior Offense:<sup>4</sup>



### Program Performance

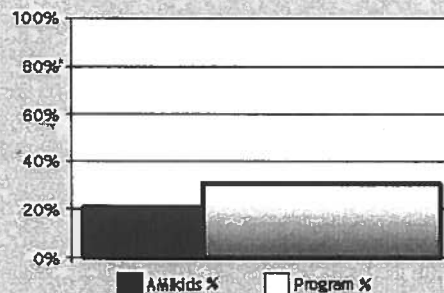
Juvenile Recidivism (2011): 31%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

#### Recidivism Comparison:



## AMKids Piedmont

20238 Hwy 72 East  
Clinton, SC 29325  
Phone: (864) 833-4505

Residential

AMKids Piedmont is located in Clinton, South Carolina. In calendar year 2011, 91 youth were released from the program. Among these youth, 83 (91%) completed favorably. Youth stayed on average 16 weeks. Of the youth released, 100% were male and 63% were minorities. The average age at enrollment was 16.0 years.

## Program Measures

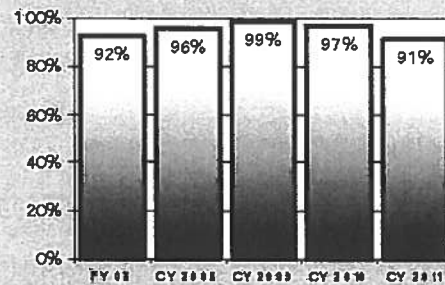
### Client Service Days

Budgeted Slots: 12,410  
Actual Slots: 10,297  
Slot Difference: -2,113

### Completion Measures

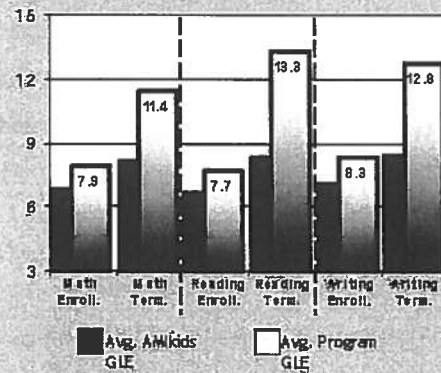
<b>Favorable</b>	<b>91%</b>
<b>Unfavorable</b>	<b>9%</b>
<b>Youth Released</b>	<b>91</b>
<b>Favorable Completions<sup>1</sup></b>	<b>83</b>

### Completion Rates by Year:



Educational Performance <sup>2</sup>	<sup>A+</sup> Enrollment (N)	<sup>A+</sup> Termination (N)
Avg. Math GLE <sup>3</sup>	7.9 (82)	11.4 (82)
Avg. Reading GLE	7.7 (82)	13.3 (82)
Avg. Writing GLE	8.3 (82)	12.8 (82)
Avg. High School Credits		2.6 (25)
Avg. College Credits Earned		n/a
Total GEDs Earned		12

### Grade Level Equivalence Scores:



## AMkids Piedmont

### Youth Demographics

#### Gender

% Male 100%

% Female 0%

#### Average Age

At Enrollment 16.0

At Termination 16.3

#### Race/Ethnicity<sup>4</sup>

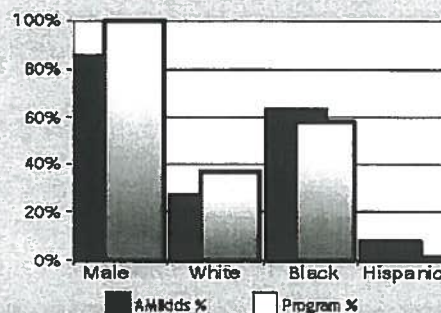
% White 37%

% Black 58%

% Hispanic 1%

% Other 4%

#### Demographic Percentages:



### Prior Offense History Summary

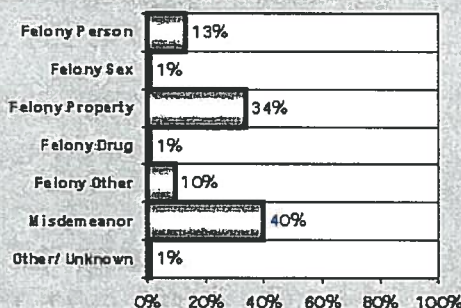
Percent With a Prior Offense: 100%<sup>N=83</sup>

Average Age at First Offense: 13.4

Average # of Prior Arrests: 5.2

Average # of Prior Convictions: 4.1

#### Most Serious Prior Offense:<sup>4</sup>



### Program Performance

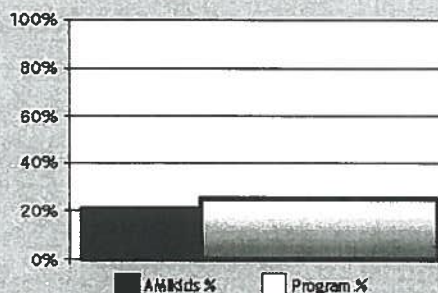
Juvenile Recidivism (2011): 25%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

#### Recidivism Comparison:



## AMkids Rio Grande Valley

27615 Buena Vista Road  
Los Fresnos, TX 78566  
Phone: (956) 233-5795

Residential

AMkids Rio Grande Valley is located in Los Fresnos, Texas. In calendar year 2011, 25 youth were released from the program. Among these youth, 19 (76%) completed favorably. Youth stayed on average 31 weeks. Of the youth released, 100% were male and 89% were minorities. The average age at enrollment was 16.8 years.

### Program Measures

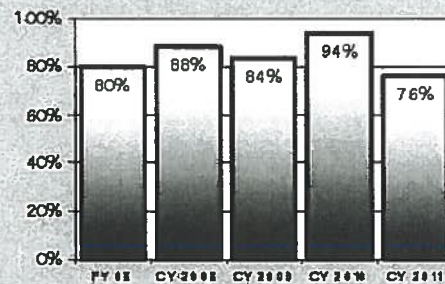
#### Client Service Days

Budgeted Slots: 10,950  
Actual Slots: 4,938  
Slot Difference: -6,012

#### Completion Measures

<b>Favorable</b>	<b>76%</b>
<b>Unfavorable</b>	<b>24%</b>
<b>Youth Released</b>	<b>25</b>
<b>Favorable Completions<sup>1</sup></b>	<b>19</b>

#### Completion Rates by Year:



#### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
<b>Avg. Math GLE<sup>3</sup></b>	n/a	n/a
<b>Avg. Reading GLE</b>	n/a	n/a
<b>Avg. Writing GLE</b>	n/a	n/a
<b>Avg. High School Credits</b>		3.4 (10)
<b>Avg. College Credits Earned</b>		7.8 (5)
<b>Total GEDs Earned</b>		7

#### Grade Level Equivalence Scores:

Educational Services are Provided and Data are Contained within the Local School System

■ Avg. AMkids GLE    □ Avg. Program GLE

## AMikids Rio Grande Valley

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

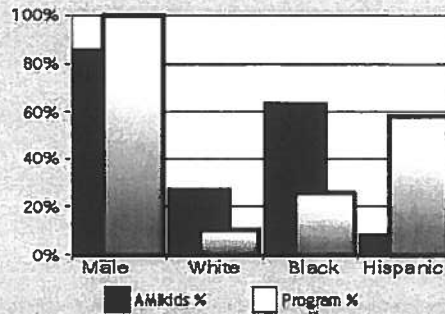
#### Average Age

At Enrollment	16.8
At Termination	17.4

#### Race/Ethnicity<sup>4</sup>

% White	11%
% Black	26%
% Hispanic	58%
% Other	5%

Demographic Percentages:



### Prior Offense History Summary

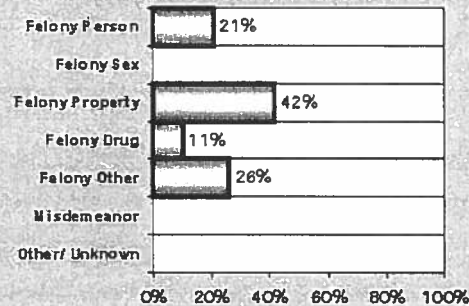
Percent With a Prior Offense: 100%<sup>N=19</sup>

Average Age at First Offense: 13.5

Average # of Prior Arrests: 3.9

Average # of Prior Convictions: 4.3

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

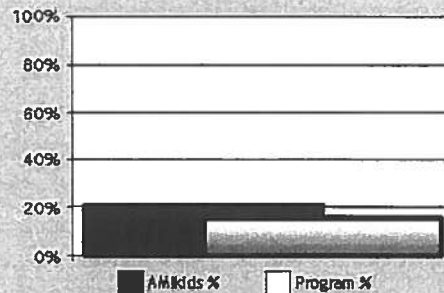
Juvenile Recidivism (2011): 16%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

Recidivism Comparison:



## AMkids Sand Hills

2381 Campbell Lake Rd  
Patrick, SC 29584  
Phone: (843) 921-3000

Residential

AMkids Sand Hills is located in Patrick, South Carolina. In calendar year 2011, 93 youth were released from the program. Among these youth, 85 (91%) completed favorably. Youth stayed on average 20 weeks. Of the youth released, 100% were male and 86% were minorities. The average age at enrollment was 16.4 years.

### Program Measures

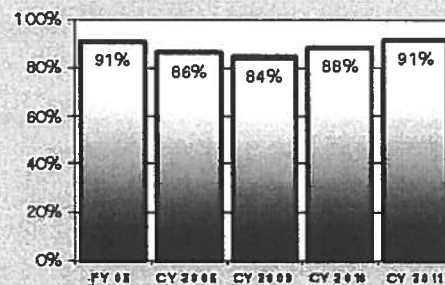
#### Client Service Days

Budgeted Slots: 14,600  
Actual Slots: 13,039  
Slot Difference: -1,561

#### Completion Measures

<b>Favorable</b>	<b>91%</b>
<b>Unfavorable</b>	<b>9%</b>
<b>Youth Released</b>	<b>93</b>
<b>Favorable Completions<sup>1</sup></b>	<b>85</b>

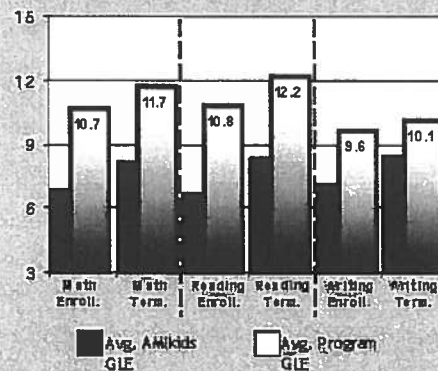
#### Completion Rates by Year:



#### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
Avg. Math GLE <sup>3</sup>	10.7 (78)	11.7 (78)
Avg. Reading GLE	10.8 (78)	12.2 (78)
Avg. Writing GLE	9.6 (78)	10.1 (78)
Avg. High School Credits		3.0 (44)
Avg. College Credits Earned		n/a
Total GEDs Earned		9

#### Grade Level Equivalence Scores:



## AMKids Sand Hills

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

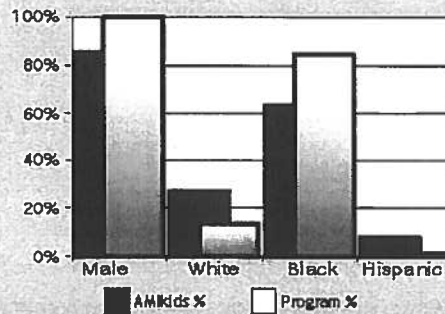
#### Average Age

At Enrollment	16.4
At Termination	16.8

#### Race/Ethnicity<sup>4</sup>

% White	14%
% Black	84%
% Hispanic	1%
% Other	1%

Demographic Percentages:



### Prior Offense History Summary

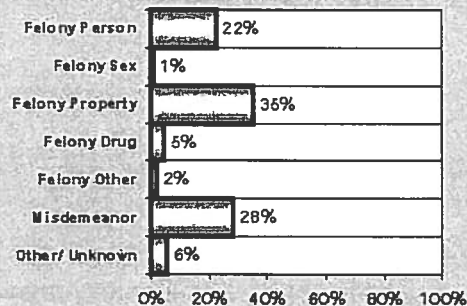
Percent With a Prior Offense: 100%<sup>N=85</sup>

Average Age at First Offense: 13.3

Average # of Prior Arrests: 5.6

Average # of Prior Convictions: 4.9

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

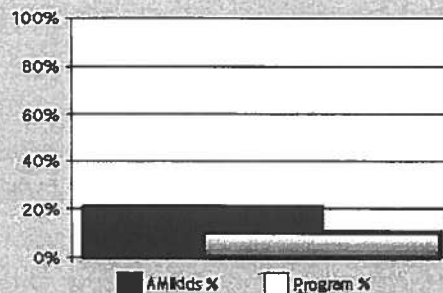
Juvenile Recidivism (2011): 11%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

Recidivism Comparison:



## AMkids Space Coast

1000 Inspiration Lane  
Melbourne, FL 32934  
Phone: (321) 752-3200

Residential

AMkids Space Coast is located in Melbourne, Florida. In calendar year 2011, 44 youth were released from the program. Among these youth, 43 (98%) completed favorably. Youth stayed on average 36 weeks. Of the youth released, 100% were male and 53% were minorities. The average age at enrollment was 16.5 years.

## Program Measures

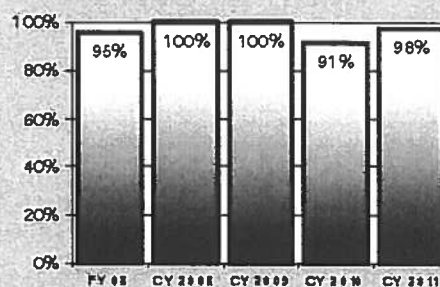
### Client Service Days

Budgeted Slots: 12,045  
Actual Slots: 10,807  
Slot Difference: -1,238

### Completion Measures

<b>Favorable</b>	<b>98%</b>
<b>Unfavorable</b>	<b>2%</b>
<b>Youth Released</b>	<b>44</b>
<b>Favorable Completions<sup>1</sup></b>	<b>43</b>

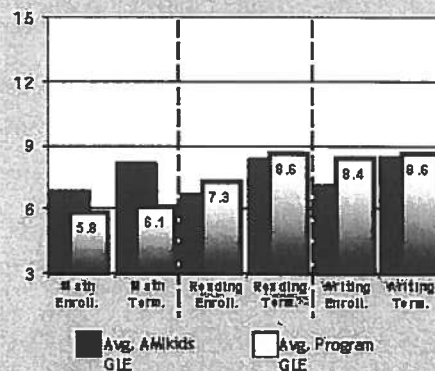
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
<b>Avg. Math GLE<sup>3</sup></b>	<b>5.8 (42)</b>	<b>6.1 (42)</b>
<b>Avg. Reading GLE</b>	<b>7.3 (42)</b>	<b>8.6 (42)</b>
<b>Avg. Writing GLE</b>	<b>8.4 (42)</b>	<b>8.6 (42)</b>
<b>Avg. High School Credits</b>		<b>4.6 (35)</b>
<b>Avg. College Credits Earned</b>		<b>n/a</b>
<b>Total GEDs Earned</b>		<b>16</b>

### Grade Level Equivalence Scores:



## AMikids Space Coast

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

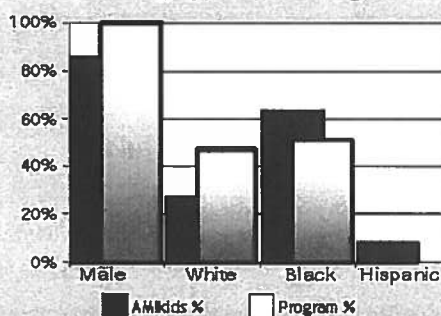
#### Average Age

At Enrollment	16.5
At Termination	17.2

#### Race/Ethnicity<sup>4</sup>

% White	47%
% Black	51%
% Hispanic	0%
% Other	2%

Demographic Percentages:



### Prior Offense History Summary

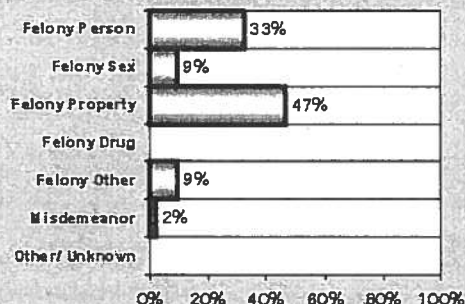
Percent With a Prior Offense: 100%<sup>N=43</sup>

Average Age at First Offense: 13.8

Average # of Prior Arrests: 12.8

Average # of Prior Convictions: 9.9

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

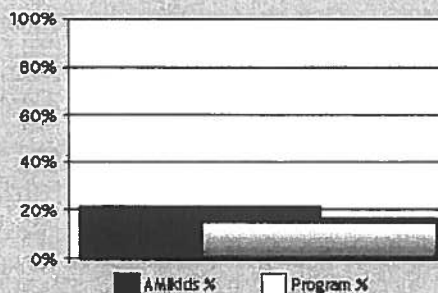
Juvenile Recidivism (2011): 16%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

QI Score (2011): 68%

Note: QI score: Overall measure of program performance and quality of services provided as measured through a five-day peer review process. Similar to school grade scores where 90%-100% indicates exceptional performance and scores below 60% indicate failure to meet minimum standards.

Recidivism Comparison:



## AMkids White Pines

742 T Bishop Rd  
Jonesville, SC 29353  
Phone: (864) 674-0458

Residential

AMkids White Pines is located in Jonesville, South Carolina. In calendar year 2011, 98 youth were released from the program. Among these youth, 97 (99%) completed favorably. Youth stayed on average 18 weeks. Of the youth released, 100% were male and 69% were minorities. The average age at enrollment was 15.3 years.

## Program Measures

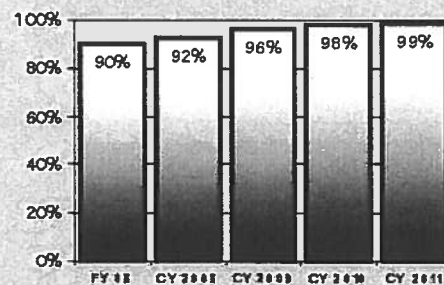
### Client Service Days

Budgeted Slots: 14,600  
Actual Slots: 13,509  
Slot Difference: -1,091

### Completion Measures

<b>Favorable</b>	<b>99%</b>
<b>Unfavorable</b>	<b>1%</b>
<b>Youth Released</b>	<b>98</b>
<b>Favorable Completions<sup>1</sup></b>	<b>97</b>

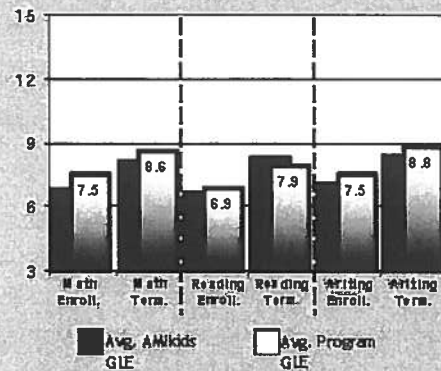
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
<b>Avg. Math GLE<sup>3</sup></b>	<b>7.5 (90)</b>	<b>8.6 (90)</b>
<b>Avg. Reading GLE</b>	<b>6.9 (90)</b>	<b>7.9 (90)</b>
<b>Avg. Writing GLE</b>	<b>7.5 (90)</b>	<b>8.8 (90)</b>
<b>Avg. High School Credits</b>		<b>3.3 (33)</b>
<b>Avg. College Credits Earned</b>		<b>n/a</b>
<b>Total GEDs Earned</b>		<b>6</b>

### Grade Level Equivalence Scores:



## AMKids White Pines

### Youth Demographics

#### Gender

% Male	100%
% Female	0%

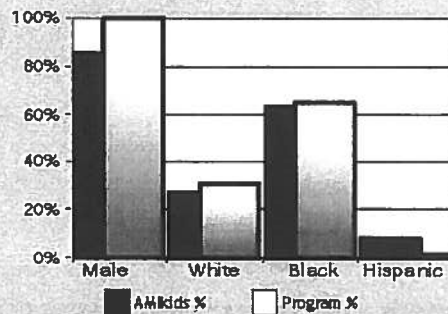
#### Average Age

At Enrollment	15.3
At Termination	15.7

#### Race/Ethnicity<sup>4</sup>

% White	31%
% Black	65%
% Hispanic	1%
% Other	3%

Demographic Percentages:



### Prior Offense History Summary

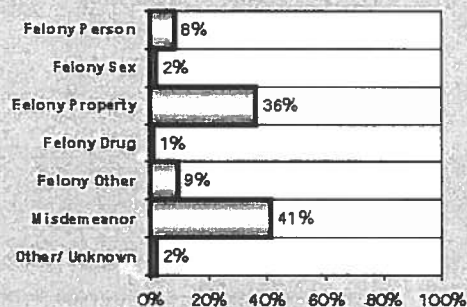
Percent With a Prior Offense: 100%<sup>N=97</sup>

Average Age at First Offense: 13.2

Average # of Prior Arrests: 4.7

Average # of Prior Convictions: 4.3

Most Serious Prior Offense:<sup>4</sup>



### Program Performance

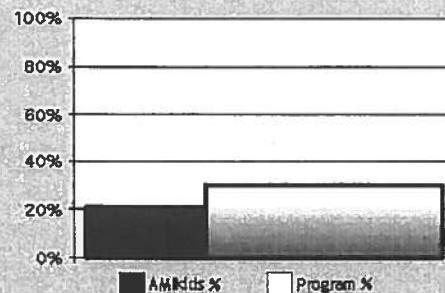
Juvenile Recidivism (2011): 30%

Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

ACA Score (2011): n/a

Note: ACA score: The measure of the program's compliance with the national non-mandatory standards toward accreditation. In order to be accredited, an agency must comply with 100% of all mandatory standards and 90% of all non-mandatory standards.

Recidivism Comparison:



## AMkids YES

4337 Saffold Rd  
Wimauma, FL 33598  
Phone: (813) 671-5213

Residential

AMkids YES is located in Wimauma, Florida. In calendar year 2011, 54 youth were released from the program. Among these youth, 54 (100%) completed favorably. Youth stayed on average 36 weeks. Of the youth released, 100% were male and 72% were minorities. The average age at enrollment was 16.1 years.

## Program Measures

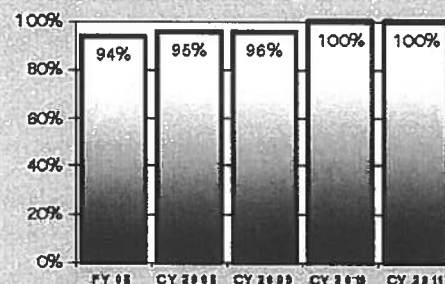
### Client Service Days

Budgeted Slots: 12,045  
Actual Slots: 11,829  
Slot Difference: -216

### Completion Measures

<b>Favorable</b>	<b>100%</b>
<b>Unfavorable</b>	<b>0%</b>
<b>Youth Released</b>	<b>54</b>
<b>Favorable Completions<sup>1</sup></b>	<b>54</b>

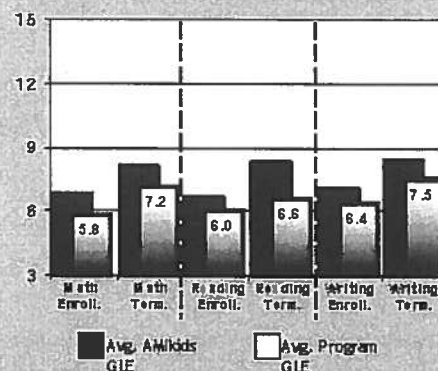
### Completion Rates by Year:



### Educational Performance<sup>2</sup>

	At Enrollment (N)	At Termination (N)
Avg. Math GLE <sup>3</sup>	5.8 (53)	7.2 (53)
Avg. Reading GLE	6.0 (53)	6.6 (53)
Avg. Writing GLE	6.4 (53)	7.5 (53)
Avg. High School Credits		6.1 (29)
Avg. College Credits Earned		n/a
Total GEDs Earned		6

### Grade Level Equivalence Scores:



## Youth Demographics

### Gender

% Male	100%
% Female	0%

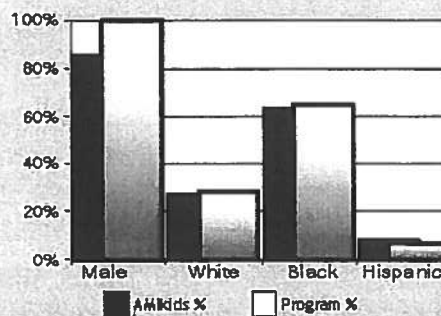
### Average Age

At Enrollment	16.1
At Termination	16.8

### Race/Ethnicity\*

% White	28%
% Black	65%
% Hispanic	7%
% Other	0%

Demographic Percentages:



## Prior Offense History Summary

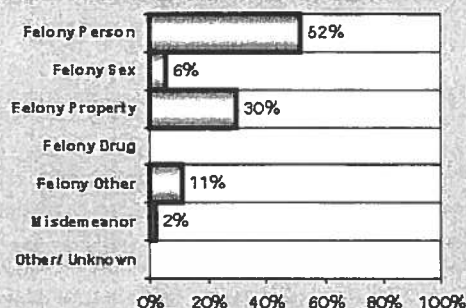
Percent With a Prior Offense: 100%<sup>N=54</sup>

Average Age at First Offense: 13.0

Average # of Prior Arrests: 12.6

Average # of Prior Convictions: 11.3

Most Serious Prior Offense:<sup>4</sup>



## Program Performance

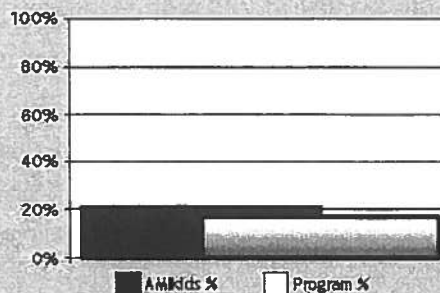
Juvenile Recidivism (2011): 17%

\*Note: Recidivism: Any subsequent juvenile misdemeanor or felony offense within one year of completion from the program that resulted in an adjudication. This does not include adult convictions.

QI Score (2012): 72%

Note: QI score: Overall measure of program performance and quality of provided services through a five-day peer review process. Similar to school grade scores where 90%-100% indicates exceptional performance and scores below 60% indicate failure to meet minimum standards.

Recidivism Comparison:





# **OFFICE OF COMMUNITY ALTERNATIVES**

**GEORGETOWN MARINE INSTITUTE**

**AWARD LETTER**

STATE OF SOUTH CAROLINA  
MATERIALS MANAGEMENT OFFICE  
CAPITAL CENTER  
1201 MAIN STREET, SUITE 600  
COLUMBIA SC 29201

**Statement of Award**

Posting Date: June 17, 2014

**Solicitation: 5400007516**

**Description: MARINE & WILDERNESS CAMPS FOR DJJ**

**Agency: SC Department of Juvenile Justice**

The State awards contracts noted below. This document becomes the final Statement of Award effective **8:00 A.M., June 18, 2014**. Unless otherwise provided in the solicitation, the final statement of award serves as acceptance of your offer.

Contractor should not perform work on or incur any costs associated with the contract prior to the effective date of the contract. Contractor should not perform any work prior to the receipt of a purchase order from the using governmental unit. The State assumes no liability for any expenses incurred prior to the effective date of the contract and issuance of a purchase order.

AWARD - ONE RESPONSE RECEIVED (FOR EACH LOCATION): IN ACCORDANCE WITH SC PROCUREMENT CODE 11-35-1520 (10) AWARD, "WHEN ONLY ONE RESPONSE IS RECEIVED, THE NOTICE OF INTENT TO AWARD AND THE DELAY OF AWARD MAY BE WAIVED."

PROTEST - CPO ADDRESS - MMO: Any protest must be addressed to the Chief Procurement Officer, Materials Management Office, and submitted in writing

(a) by email to [protest-mmo@mmo.sc.gov](mailto:protest-mmo@mmo.sc.gov) ,

(b) by facsimile at 803-737-0639 , or

(c) by post or delivery to 1201 Main Street, Suite 600, Columbia, SC 29201.

**Maximum Contract Period:** August 01, 2014 through July 31, 2019

**Initial Contract Period:** August 01, 2014 through July 31, 2015

**Contract Number:** 4400008565      **Vendor Number:** 7000023007  
**Awarded To:** AMIKIDS INC  
5915 BENJAMIN CENTER DRIVE  
TAMPA FL 33634

**\*Total Potential Value:**      \$ 6,892,750.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00001	Georgetown Marine Institute	\$1,378,550.00

**Contract Number:** 4400008566      **Vendor Number:** 7000023007  
**Awarded To:** AMIKIDS INC  
5915 BENJAMIN CENTER DRIVE  
TAMPA FL 33634

**Total Potential Value:**      \$ 6,892,750.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00002	Piedmont Wilderness Institute	\$1,378,550.00

**Contract Number:** 4400008567      **Vendor Number:** 7000023007  
**Awarded To:** AMIKIDS INC  
5915 BENJAMIN CENTER DRIVE  
TAMPA FL 33634

**Total Potential Value:**      \$ 7,734,100.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00003	Camp Bennettsville	\$1,546,820.00

**Contract Number:** 4400008568      **Vendor Number:** 7000023007  
**Awarded To:** AMIKIDS INC  
5915 BENJAMIN CENTER DRIVE  
TAMPA FL 33634

**Total Potential Value:**      \$ 7,745,915.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00004	Camp Sand Hills	\$1,549,183.00

**Contract Number:** 4400008569      **Vendor Number:** 7000023007  
**Awarded To:** AMIKIDS INC  
5915 BENJAMIN CENTER DRIVE  
TAMPA FL 33634

**Total Potential Value:**      \$ 7,701,190.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00005	Camp White Pines	\$1,540,238.00

**Contract Number:** 4400008581      **Vendor Number:** 7000118917  
**Awarded To:** COMMUNITY EDUCATION CENTERS INC  
35 FAIRFIELD PLACE  
WEST CALDWELL NJ 07006

**Total Potential Value:**      \$ 8,267,555.20

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00006	Camp Aspen	\$1,653,511.04

**Contract Number:** 4400008580      **Vendor Number:** 7000084060  
**Awarded To:** GENERATIONS ALTERNATIVE PROGRAM  
P.O. Box 80009  
SIMPSONVILLE SC 29680

**Total Potential Value:**      \$ 7,508,760.00

<b>Item</b>	<b>Description</b>	<b>**Yearly Budget</b>
00007	Generations Alternative Program	\$1,501,752.00

**\*Estimated for internal purposes only**

**\*\*Yearly Budgets for option years are dependent on available funding**

**Procurement Officer**  
CHRIS MANOS