

			coordinate resident wraparound support services referral/transition process	and working in NCP areas	supported, referred and/or transitioned as needed; expected contact/reach 75 residents
	6	0.75	NEIGHBORHOOD OUTREACH: Host Community Conversation re: NCP plans and progress	Community conversation event hosted in each NCP area (NW, NE, SW)	NCP Community Conversation held in all three neighborhood areas (NW, SW, NE); expected contact/reach 80 residents
	7	0.50	EVALUATION: Collect, measure and compare NCP data, indicators and expected outcomes	NCP data, indicators and expected outcomes	NCP data, indicators and expected outcomes collected and shared
	8	0.25	PROJECT MGMT: NCP Planning & Progress Discussions	NCP Project Team Meetings held regularly	NCP Project Team acknowledges, reviews, acts upon and is accountable for all NCP deliverables and expectations
	9	0.25	FISCAL REPORTING: NCP's fiscal process followed; timely submission of fiscal reimbursement process documentation	Reimbursement documentation completed by each funded partner agency	NCP expenditures accurately documented, submitted and fully reimbursed
	10	0.75	NEIGHBORHOOD OUTREACH: Host Canopy pop-up event in each NCP area	Canopy Pop-up events held within each NCP area	Canopy Pop-up events held in each NCP area to address identified neighborhood needs and expectations; expected contact/reach 185 residents
4	1	0.75	NEIGHBORHOOD OUTREACH: Continue NCP neighborhood engagement walks (NW, SW, NE)	At least two (2) NCP neighborhood engagement walks conducted monthly (NW, SW, NE)	Residents' needs identified and addressed; referrals/transitions completed, feedback received via NCP neighborhood engagement walks completed each month in NW, SW and NE NCP areas; expected contact/reach 210 residents
	2	0.75	NEIGHBORHOOD OUTREACH: Host Community Conversation re: NCP plans and progress	Community conversation event hosted in each NCP area (NW, NE, SW)	NCP Community Conversation held in all three neighborhood areas (NW, SW, NE); expected contact/reach 80 residents

3	0.25	<b>SERVICES NETWORK:</b> Connect, build and coordinate neighborhood Partner Agencies networks (NW, SW, NE)	Regular check-in meetings between MC2, BTS and supporting partner agencies	Coordinated activity, program and/or services via NCP and its supporting partner agencies achieved in support of resident and neighborhood needs
4	0.75	<b>SERVICES NETWORK:</b> Continue to connect and coordinate resident wraparound support services referral/transition process	Service delivery model developed and working in NCP areas	NCP clients/neighborhood residents are informed, supported, referred and/or transitioned as needed; expected contact/reach 75 residents
5	1.00	<b>ANCHOR AGENCIES:</b> Continue working Anchor Agency's Capacity Building and Workforce Development plan	NCP Anchor Agency Asset Building Plan implemented and monitored with fidelity; course correcting as needed	NCP Anchor Agency capacity building and workforce development activities completed as planned - Year 4
6	0.25	<b>EVALUATION:</b> Collect, measure and compare NCP data, indicators and expected outcomes	NCP data, indicators and expected outcomes	NCP data, indicators and expected outcomes collected and shared
7	0.50	<b>PROJECT MGMT:</b> Continued working of NCP Implementation Plan (phase 1-4)	NCP Implementation Plan (phase 1-4) followed	NCP four phase plan of implementation documented (Prepare, Practice, Pilot, Proceed) - Year 4 PROCEED
8	0.25	<b>PROJECT MGMT:</b> NCP Planning & Progress Discussions	NCP Project Team Meetings held regularly	NCP Project Team acknowledges, reviews, acts upon and is accountable for all NCP deliverables and expectations
9	0.75	<b>FISCAL REPORTING:</b> Complete Grant Award Close-out Requirements & Reporting	Reimbursement and year-end close out documentation completed by each funded partner agency	NCP expenditures accurately documented, submitted and fully reimbursed

## Case Caico, Rebecca

---

**From:** Case Caico, Rebecca <RebeccaCaico@monroecounty.gov>  
**Sent:** Saturday, February 11, 2023 5:41 PM  
**To:** Neighborhood Collaborative Project; Janelle Duda-Banwar; jrbasley@c3consultancy.org  
**Cc:** Pelow, Faye  
**Subject:** NCP Budget - Monroe County ARPA Survey (3).xlsx  
**Attachments:** NCP Budget - Monroe County ARPA Survey (3).xlsx

Happy Saturday-

Sorry to be sending this on the weekend, but we are finalizing the documents for the contract and we noticed that your revised budget does not reflect the amount awarded. Your award amount is \$7,160,849 but your revised budget lists \$7,280,262.

Can you please upload a budget into the survey to reflect the approved award amount.

Thank you so much.

Rebecca Case Caico (She/Her/Hers)  
Deputy Director  
Planning and Development  
(585) 753-2005  
1150 City Place  
50 W. Main St.  
Rochester, NY 14614



Adam J. Bello  
COUNTY CLERK



# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

Neighborhood Collaborative Project (NCP) Workers (Cameron, FTAC, SWAN)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
Neighborhood Collaborative Project (NCP) Workers (Cameron, FTAC, SWAN)	\$ 187,500	\$ 808,146
On-Site Vocational Trainers (Cameron, FTAC, SWAN)	\$ 206,250	\$ 888,966
On-Site Social Workers (Cameron, FTAC, SWAN)	\$ 225,000	\$ 969,780
Neighborhood Collaborative Project (NCP) Liaison (BTS)	\$ 62,500	\$ 269,382
Full-Time Social Worker (MC2)	\$ 75,000	\$ 323,260
Part-time Social Worker (MC2)	\$ 37,500	\$ 161,630
NCP Local Researcher (OTG)	\$ 78,000	\$ 336,190
Student Research Assistant (OTG)	\$ 10,400	\$ 44,825
Communications Coordinator (OTG)	\$ 18,000	\$ 77,582
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 900,150</b>	<b>\$ 3,879,761</b>
<b>Other Than Personnel Services Costs</b>		
Vocational Training Stipends: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 54,000	\$ 232,746
Neighborhood Outreach Supplies: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 10,800	\$ 45,183
Office Supply Supplement: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 7,200	\$ 30,120
Facility Use / Operations Support: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 36,000	\$ 150,612
Snacks, Swag/Incentive Supplies: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 7,200	\$ 30,120
Credibility Trust /Brand Value: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 54,000	\$ 225,915
10% de minimis indirect cost rate: Anchor Agencies (Cameron, FTAC, SWAN)	\$ 78,795	\$ 338,160
Administrative Support: Support Services Partners (LABA, BMC,BSCSC)	\$ 81,000	\$ 338,871
Food Pantry Supplies (TPP)	\$ 27,000	\$ 112,957
Per Diem Stipends for Peer Outreach Workers (AFC)	\$ 27,000	\$ 112,957
Staff Mileage Reimbursement (BTS, C3)	\$ 2,088	\$ 8,737
Contracted Services: NCP Client Wraparound Support Services (BTS)	\$ 54,000	\$ 232,747
Contracted Services: Anchor Agency Social Worker Supervision (MC2)	\$ 22,000	\$ 94,823
Research Supplies (OTG)	\$ 3,000	\$ 12,551
NCP Marketing & Communications (OTG)	\$ 8,000	\$ 32,000
Software and Subscriptions (OTG)	\$ 15,855	\$ 66,336
Contracted Services: Project Lead / Community Consultant (C3)	\$ 75,000	\$ 323,260
Contracted Services: Historian / Neighborhood Legacy (C3)	\$ 25,000	\$ 107,754
Contracted Services: On-Site / Field Coordinator (C3)	\$ 18,750	\$ 80,816
Contracted Services: Neighborhood Ambassadors (C3)	\$ 45,000	\$ 188,264
RTS Bus Passes/Transportation Assistance	\$ 4,644	\$ 19,427
Per Diem Stipends for Event Logistics Helpers (C3)	\$ 1,200	\$ 5,020
Microsoft Surface Pro Packages - 5 (C3)	\$ 10,875	\$ 18,602
NCP Supplies & Materials (C3)	\$ 1,200	\$ 5,020
10% de minimis indirect cost rate (BTS, MC2, OTG, C3)	\$ 56,802	\$ 240,824
Fiscal Sponsor Administrative Cost Rate - 5% (CRC)	\$ 81,328	\$ 346,679
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 807,737</b>	<b>\$ 3,400,501</b>
<b>Total Project Cost:</b>	<b>\$ 1,707,887</b>	<b>\$ 7,280,262</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

Organization Name:

Fiscal Sponsor: Community Resource Collaborative

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	\$ -	\$ -
<b>Other Than Personnel Services Costs</b>		
Fiscal Sponsor Administrative Cost (5%)	\$ 81,328	\$ 346,679
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 81,328</b>	<b>\$ 346,679</b>
<b>Total Project Cost:</b>	<b>\$ 81,328</b>	<b>\$ 346,679</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

NW Anchor Agency: Cameron Community Ministries (Cameron)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
Neighborhood Collaborative Project (NCP) Worker	\$ 62,500	\$ 269,382
On-Site Vocational Trainer(Workforce Development / Employment)	\$ 68,750	\$ 296,322
On-Site Social Worker(Health / Human Services)	\$ 75,000	\$ 323,260
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 206,250</b>	<b>\$ 888,964</b>
Other Than Personnel Services Costs		
Vocational Training Stipends for Community Members	\$ 18,000	\$ 77,582
Outreach Supplies & Materials (walks & corner pop-ups)	\$ 3,600	\$ 15,061
Office Supply Supplement	\$ 2,400	\$ 10,040
Facility Use / Operations Supplement	\$ 12,000	\$ 50,204
Snacks, Incentives, Swag for Community Distribution	\$ 2,400	\$ 10,040
Neighborhood Credibility / Trust Value (AA's brand identity / reputation)	\$ 18,000	\$ 75,305
10% de minimis indirect cost rate	\$ 26,265	\$ 112,720
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 82,665</b>	<b>\$ 350,952</b>
<b>Total Project Cost:</b>	<b>\$ 288,915</b>	<b>\$ 1,239,916</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

NE Anchor Agency: Father Tracy Advocacy Center (FTAC)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
Neighborhood Collaborative Project (NCP) Worker	\$ 62,500	\$ 269,382
On-Site Vocational Trainer(Workforce Development / Employment)	\$ 68,750	\$ 296,322
On-Site Social Worker (Health / Human Services)	\$ 75,000	\$ 323,260
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 206,250</b>	<b>\$ 888,964</b>
<b>Other Than Personnel Services Costs</b>		
Vocational Training Stipends for Community Members	\$ 18,000	\$ 77,582
Outreach Supplies & Materials (walks & corner pop-ups)	\$ 3,600	\$ 15,061
Office Supply Supplement	\$ 2,400	\$ 10,040
Facility Use / Operations Supplement	\$ 12,000	\$ 50,204
Snacks, Incentives, Swag for Community Distribution	\$ 2,400	\$ 10,040
Neighborhood Credibility / Trust Value (AA's brand identity / reputation)	\$ 18,000	\$ 75,305
10% de minimis indirect cost rate	\$ 26,265	\$ 112,720
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 82,665</b>	<b>\$ 350,952</b>
<b>Total Project Cost:</b>	<b>\$ 288,915</b>	<b>\$ 1,239,916</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

SW Anchor Agency: SWAN at Montgomery Neighborhood Center (SWAN)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
Neighborhood Collaborative Project (NCP) Worker	\$ 62,500	\$ 269,382
On-Site Vocational Trainer(Workforce Development / Employment)	\$ 68,750	\$ 296,322
On-Site Social Worker(Health / Human Services)	\$ 75,000	\$ 323,260
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 206,250</b>	<b>\$ 888,964</b>
<b>Other Than Personnel Services Costs</b>		
Vocational Training Stipends for Community Members	\$ 18,000	\$ 77,582
Outreach Supplies & Materials (walks & corner pop-ups)	\$ 3,600	\$ 15,061
Office Supply Supplement	\$ 2,400	\$ 10,040
Facility Use / Operations Supplement	\$ 12,000	\$ 50,204
Snacks, Incentives, Swag for Community Distribution	\$ 2,400	\$ 10,040
Neighborhood Credibility / Trust Value (AA's brand identity / reputation)	\$ 18,000	\$ 75,305
10% de minimis indirect cost rate	\$ 26,265	\$ 112,720
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 82,665</b>	<b>\$ 350,952</b>
<b>Total Project Cost:</b>	<b>\$ 288,915</b>	<b>\$ 1,239,916</b>



## Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

NE Support Service Partner: The Peoples' Pantry (TPP)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Other Than Personnel Services Costs</b>		
Food Pantry Supplies	\$ 27,000	\$ 112,957
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 27,000</b>	<b>\$ 112,957</b>
<b>Total Project Cost:</b>	<b>\$ 27,000</b>	<b>\$ 112,957</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

Organization Name:

SW Support Service Partner: Barakah Muslim Charities (BMC)

<b>Personnel Costs</b> <b>List Each Employee Name, Title/Position</b>	<b>Proposed Expenditures for Year 1 (2023)</b>	<b>Proposed Expenditures for years 1-4 (2023-2026)</b>
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Other Than Personnel Services Costs</b>		
Administrative Support (i.e. operations, emergencies, referral mgmt, supplies, etc.)	\$ 27,000	\$ 112,957
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 27,000</b>	<b>\$ 112,957</b>
<b>Total Project Cost:</b>	<b>\$ 27,000</b>	<b>\$ 112,957</b>

## Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

Citywide Support Service Partner: Action for a Better Community Action Front Center (AFC)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
<i>Fringe Benefits</i>		
<i>Total Personnel Costs:</i>	\$ -	\$ -

Other Than Personnel Services Costs	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
Per Diem Stipends for Peer Outreach Workers	\$ 27,000	\$ 112,957
<i>Total Other Than Personnel Services Costs:</i>	\$ 27,000	\$ 112,957
<i>Total Project Cost:</i>	\$ 27,000	\$ 112,957

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

Citywide Support Service Partner: Baden Street Counseling and Support Center (BSCSC)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
<i>Fringe Benefits</i>		
<i>Total Personnel Costs:</i>	\$ -	\$ -
<b>Other Than Personnel Services Costs</b>		
Administrative Support (i.e. operations, emergencies, referral mgmt, supplies, etc.)	\$ 27,000	\$ 112,957
<i>Total Other Than Personnel Services Costs:</i>	\$ 27,000	\$ 112,957
<i>Total Project Cost:</i>	\$ 27,000	\$ 112,957

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

Citywide Service Support Partner: Beyond the Sanctuary (BTS)

<b>Personnel Costs</b> <b>List Each Employee Name, Title/Position</b>	<b>Proposed Expenditures for Year 1 (2023)</b>	<b>Proposed Expenditures for years 1-4 (2023-2026)</b>
Neighborhood Collaborative Project (NCP) Liaison	\$ 62,500	\$ 269,382
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 62,500</b>	<b>\$ 269,382</b>

**Other Than Personnel Services Costs**

Mileage Reimbursement for NCP Liaison	\$ 696	\$ 2,913
Contracted Services: Client Wraparound Support Services	\$ 54,000	\$ 232,747
10% de minimis indirect cost rate	\$ 11,720	\$ 50,504
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 66,416</b>	<b>\$ 286,164</b>
<b>Total Project Cost:</b>	<b>\$ 128,916</b>	<b>\$ 555,546</b>



# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

MC Collaborative (MC2)

<b>Personnel Costs</b> List Each Employee Name, Title/Position	<b>Proposed Expenditures for Year 1 (2023)</b>	<b>Proposed Expenditures for years 1-4 (2023-2026)</b>
Full-Time Social Worker (Health / Human Services)	\$ 75,000	\$ 323,260
Part-time Social Worker (Health / Human Services)	\$ 37,500	\$ 161,630
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ 112,500</b>	<b>\$ 484,890</b>
<b>Other Than Personnel Services Costs</b>		
Contracted Services: Supervision for Anchor Agency's NCP Social Workers	\$ 22,000	\$ 94,823
10% de minimis indirect cost rate	\$ 13,450	\$ 57,972
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 35,450</b>	<b>\$ 152,795</b>
<b>Total Project Cost:</b>	<b>\$ 147,950</b>	<b>\$ 637,685</b>

# Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

On The Ground Research (OTG)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
NCP Local Researcher (part-time)	\$ 78,000	\$ 336,190
Student Research Assistant	\$ 10,400	\$ 44,825
Communications Coordinator	\$ 18,000	\$ 77,582
<i>Fringe Benefits</i>		
<i>Total Personnel Costs:</i>	\$ 106,400	\$ 458,597

<b>Other Than Personnel Services Costs</b>
--

Research Supplies	\$ 3,000	\$ 12,551
NCP Marketing & Communications	\$ 8,000	\$ 32,000
Software and Subscriptions	\$ 15,855	\$ 66,336
10% de minimis indirect cost rate	\$ 13,326	\$ 56,949
<i>Total Other Than Personnel Services Costs:</i>	\$ 40,181	\$ 167,836
<i>Total Project Cost:</i>	\$ 146,581	\$ 626,433

## Bring Monroe Back - Monroe County ARPA Budget Proposal

**Organization Name:**

C3 Consultancy Services, LLC (C3)

Personnel Costs List Each Employee Name, Title/Position	Proposed Expenditures for Year 1 (2023)	Proposed Expenditures for years 1-4 (2023-2026)
<i>Fringe Benefits</i>		
<b>Total Personnel Costs:</b>	<b>\$ -</b>	<b>\$ -</b>

### Other Than Personnel Services Costs

Contracted Services: Project Lead / Community Consultant	\$ 75,000	\$ 323,260
Contracted Services: Project Historian / Neighborhood Legacy Coordinator	\$ 25,000	\$ 107,754
Contracted Services: On-Site / Field Coordinator	\$ 18,750	\$ 80,816
Contracted Services: Neighborhood Ambassadors / Credible Messengers	\$ 45,000	\$ 188,264
Mileage Reimbursement for Contracted Staff	\$ 1,392	\$ 5,824
Bus Passes / Transportation Assistance	\$ 4,644	\$ 19,427
Per Diem Stipends	\$ 1,200	\$ 5,020
Microsoft Surface Pro Packages (5)	\$ 10,875	\$ 18,602
Supplies & Materials	\$ 1,200	\$ 5,020
10% de minimis indirect cost rate	\$ 18,306	\$ 75,399
<b>Total Other Than Personnel Services Costs:</b>	<b>\$ 201,367</b>	<b>\$ 829,386</b>
<b>Total Project Cost:</b>	<b>\$ 201,367</b>	<b>\$ 829,386</b>



## Pelow, Faye

---

**From:** Case Caico, Rebecca <RebeccaCaico@monroecounty.gov>  
**Sent:** Monday, February 13, 2023 9:42 AM  
**To:** Neighborhood Collaborative Project  
**Cc:** Janelle Duda-Banwar; Pelow, Faye; jrbasley@c3consultancy.org  
**Subject:** RE: NCP Budget - Monroe County ARPA Survey (3).xlsx

Thank you so much!

Rebecca Case Caico (She/Her/Hers)  
Deputy Director  
Planning and Development  
(585) 753-2005  
1150 City Place  
50 W. Main St.  
Rochester, NY 14614



Adam J. Bello  
COMPTROLLER & DIRECTOR



**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Monday, February 13, 2023 9:31 AM  
**To:** Case Caico, Rebecca <RebeccaCaico@monroecounty.gov>  
**Cc:** Janelle Duda-Banwar <janelle@onthegroundny.com>; Pelow, Faye <FayePelow@monroecounty.gov>; jrbasley@c3consultancy.org  
**Subject:** Re: NCP Budget - Monroe County ARPA Survey (3).xlsx

**CAUTION:** This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~  
Good morning,

It seems there was a miscalculation in our original budget submission that self-corrected when we created a separate spreadsheet for each of the 12 agencies.

I'll need to review each spreadsheet to see where and how adjustments can be made to get back to the actual award amount. I have a break in meetings later this afternoon and evening so I can figure out the correction and resubmit. Also, I spoke with Tina and she'll reach out this morning to her insurance company and get the revised certificates.

As always, we appreciate your continued assistance and support.  
Jocelyn

On Sat, Feb 11, 2023 at 5:41 PM Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)> wrote:

This message was sent securely using ZixCorp.

Happy Saturday-

Sorry to be sending this on the weekend, but we are finalizing the documents for the contract and we noticed that your revised budget does not reflect the amount awarded. Your award amount is \$7,160,849 but your revised budget lists \$7,280,262.

Can you please upload a budget into the survey to reflect the approved award amount.

Thank you so much.

Rebecca Case Caico (She/Her/Hers)

Deputy Director

Planning and Development

(585) 753-2005

1150 City Place  
[50 W. Main St.](#)  
[Rochester, NY 14614](#)



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This message was secured by Zix<sup>&#174;</sup>.

## Case Caico, Rebecca

---

**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Monday, February 13, 2023 10:13 PM  
**To:** Case Caico, Rebecca  
**Cc:** Janelle Duda-Banwar; Pelow, Faye; jrbasley@c3consultancy.org  
**Subject:** Re: NCP Budget - Monroe County ARPA Survey (3).xlsx

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

Rebecca & Faye,

As promised, the corrected NCP budget has been uploaded to the County's ARPA survey portal. No changes were needed for the narrative.

*Jocelyn Basley, Community Consultant*

**Project Lead for the Neighborhood Collaborative Project (NCP)**

On Mon, Feb 13, 2023 at 9:30 AM Neighborhood Collaborative Project  
<[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)> wrote:

Good morning,

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Thank you so much.

Rebecca Case Caico (She/Her/Hers)

Deputy Director

Planning and Development

(585) 753-2005

1150 City Place  
[50 W. Main St.](#)  
[Rochester, NY 14614](#)



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**Pelow, Faye**

---

**From:** Rebecca Case Caico <noreply@monroecounty.gov>  
**Sent:** Wednesday, March 1, 2023 3:59 PM  
**To:** Kim Boedicker; Laura Smith; Rebecca Case Caico; Faye Pelow  
**Subject:** Re: Exhibit G

This is an automated email from Monroe County's Contract Management System (<http://contracthq.com>).  
DO NOT REPLY TO THIS EMAIL.

-----  
To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10312/messages/view/70953#70957>

I have updated Exhibit G. I cannot delete the NCP version.

To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10312/messages/view/70953#70957>

-----  
This is an automated email from Monroe County's Contract Management System (<http://contracthq.com>).  
DO NOT REPLY TO THIS EMAIL.

## Case Caico, Rebecca

---

**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Thursday, March 9, 2023 8:03 PM  
**To:** Pelow, Faye  
**Cc:** Tina Paradiso; Ian Smith; Case Caico, Rebecca; Boedicker, Kim C  
**Subject:** Re: Insurance Expiring on 2/16/23- \$3M in Aggregate Coverage Needed

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

SUCH WONDERFUL NEWS!!! On behalf of NCP and all of our partners, we appreciate your continued support and guidance throughout this process. THANK YOU ALL!!!



*Jocelyn Basley, Community Consultant*

**Project Lead for the Neighborhood Collaborative Project (NCP)**

On Thu, Mar 9, 2023 at 4:41 PM Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)> wrote:

This message was sent securely using ZixCorp.

Thanks Tina! I have put the packet together, uploaded everything into ContractHQ and moved the contract forward to routing. We will let you know if anything else is needed.

Best,

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Sent:** Thursday, March 9, 2023 11:22 AM  
**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Jocelyn Basley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>; Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Cc:** Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>; Boedicker, Kim C <[KimBoedicker@monroecounty.gov](mailto:KimBoedicker@monroecounty.gov)>  
**Subject:** Re: Insurance Expiring on 2/16/23- \$3M in Aggregate Coverage Needed

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~~~~~  
All:  
Please see attached. I think this covers it....

On 2/27/2023 10:02 AM, Pelow, Faye wrote:

This message was sent securely using ZixCorp.

Hi Tina and Jocelyn,

I do see the \$3M aggregate (with the umbrella) for General Liability- thank you! I do not, however, see the additional Professional Liability Policy that is required with \$1M per occurrence and \$3M aggregate- this is usually listed separately on the ACORD. Insurance documents are not in my normal day job, though (this is something that Rebecca and I are doing specifically for ARPA) so I could certainly be missing something. I am CCing Kim Boedicker who is much more familiar with these documents than I am to also assist and explain what the County requires.

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150



Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Sent:** Friday, February 24, 2023 4:48 PM  
**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Jocelyn Basley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>; Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Cc:** Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>  
**Subject:** Re: Insurance Expiring on 2/16/23- \$3M in Aggregate Coverage Needed

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~~~~~

That's what I sent you - it has the 3MM aggregate - its the way they show it. I am ccing in my insurance agent in case I am using the wrong words. But that's what I got.

Ian:  
Can you chime in please? Because I appear to be lost.

Thanks!  
Tina

On 2/24/2023 4:42 PM, Pelow, Faye wrote:

Zix

Hi Tina,

Thank you! I have uploaded these documents into ContrackHQ. The only thing that appears to be missing from the ACORD form is the Professional Liability policy (\$1M per occurrence, \$3M aggregate). Could you please have proof of this policy sent to me or update this in ContrackHQ (in the Professional Liability section)? We should then be able to move your contract forward!

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

**Sent:** Friday, February 24, 2023 3:08 PM

**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Jocelyn Basley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>

**Cc:** Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>

**Subject:** Re: Insurance Expiring on 2/16/23- \$3M in Aggregate Coverage Needed

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~~~~~

Happy Friday!! Please see attached.

Have a great weekend!

Tina

On 2/24/2023 1:09 PM, Pelow, Faye wrote:



Hi Tina,

Just following up on this- any news?

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Sent:** Friday, February 17, 2023 9:43 AM  
**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Jocelyn Basley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>  
**Cc:** Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>  
**Subject:** Re: Insurance Expiring on 2/16/23- \$3M in Aggregate Coverage Needed

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~~~~~

Dr. Pelow:  
Hoping all is well. Happy Friday! I am just waiting for the insurance company to update and send the umbrella agreement. They tell me it takes a few days. You will be the second to receive it, that I promise.

More to follow,  
Tina

On 2/17/2023 9:24 AM, Pelow, Faye wrote:

Zix

Hi Tina,

Do you have any updates on this? Your insurance certificates are the last thing we need to move your contract forward in ContractHQ. Also, rather than a copy of your whole policy, we will need an ACORD form or one of the form types in the memo attached.

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning &  
Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

---

**From:** Pelow, Faye

**Sent:** Monday, February 13, 2023 3:20 PM

**To:** 'Tina Paradiso'

[<tinap@commresourcecollab.org>](mailto:tinap@commresourcecollab.org); Jocelyn Basley

[<neighborhoodcollaborative@gmail.com>](mailto:neighborhoodcollaborative@gmail.com)

**Cc:** Case Caico, Rebecca

[<RebeccaCaico@monroecounty.gov>](mailto:RebeccaCaico@monroecounty.gov)

**Subject:** RE: Insurance Expiring on 2/16/23- \$3M  
in Aggregate Coverage Needed

Great- thanks Tina!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning &  
Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Tina Paradiso

[<tinap@commresourcecollab.org>](mailto:tinap@commresourcecollab.org)

**Sent:** Monday, February 13, 2023 1:15 PM

**To:** Pelow, Faye

[<FayePelow@monroecounty.gov>](mailto:FayePelow@monroecounty.gov); Jocelyn Basley

[<neighborhoodcollaborative@gmail.com>](mailto:neighborhoodcollaborative@gmail.com)

**Cc:** Case Caico, Rebecca

[<RebeccaCaico@monroecounty.gov>](mailto:RebeccaCaico@monroecounty.gov)

**Subject:** Re: Insurance Expiring on 2/16/23- \$3M  
in Aggregate Coverage Needed

CAUTION: This email originated from outside  
Monroe County systems. Exercise caution when  
opening attachments or clicking links, especially  
from unknown senders.

~~~~~

All:

I am hoping to have this updated and to you by tomorrow. Sent the request in this morning to my insurance carrier.

Have a great day!

Tina

On 2/10/2023 11:58 PM, Pelow, Faye wrote:

Zix

Hi Jocelyn and Tina,

We are working on setting up your contract in ContractHQ and I noticed some potential issues with your insurance certificates- your Worker's Comp and Disability certificates that were submitted in the portal will expire on 2/16. We will need active policies to enter into a contract. Could you please send me the updated policies?

Also, please see the attached insurance memo that identifies the General and Professional Liability insurance that is required to be a vendor with the County. We need \$3 Million in aggregate coverage but from this plan it look like you have \$1 million in coverage. Can you please send me an updated policy that reflects this change?

Thanks!

**Dr. Faye Pelow**

*Community Development  
Initiatives Manager*

Monroe County Department of  
Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

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Executive Director  
Community Resource Collaborative, Inc.

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**Pelow, Faye**

---

**From:** noreply-contrackhq@monroecounty.gov  
**Sent:** Friday, March 10, 2023 8:09 AM  
**To:** FayePelow@monroecounty.gov  
**Subject:** Contract Approval Requested

This is an automated email from Monroe County's Contract Management System (<http://contrackhq.com>).  
DO NOT REPLY TO THIS EMAIL.

-----

The following contract requires your approval / signature. You are receiving this email because you have been specified as the user responsible for completing this approval step. Please visit the address given at the bottom of this email to approve or reject this contract.

Vendor: Community Resource Collaborative, Inc.  
Contract: ARPA Subaward Grant Agreement - Neighborhood Collaborative Project (NCP)  
Department: Planning and Development  
Division:  
Start Date: 03/01/2023  
End Date: 12/31/2026  
Type: New Contract

Name of approval step:

Planning & Dev review

Message / Additional Instructions:

Hi Faye-  
Please hold in your queue until the umbrella endorsement is obtained.  
If Law provides you with a waiver for the umbrella endorsement, please let me know and I can regenerate the contract.  
thank you-  
Kim

You can access this contract at this address:

<http://contrackhq.com/contract/10313>

-----  
This is an automated email from Monroe County's Contract Management System (<http://contrackhq.com>).  
DO NOT REPLY TO THIS EMAIL.

## Case Caico, Rebecca

---

**From:** Tina Paradiso <tinap@commresourcecollab.org>  
**Sent:** Friday, March 10, 2023 3:05 PM  
**To:** Boedicker, Kim C; noreply; Smith, Laura M; Case Caico, Rebecca; Pelow, Faye; Jocelyn Bassley; Cynthia Gates  
**Subject:** Re: Insurance Required- Endorsement for Umbrella Policy

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

Thanks!! I am cc'ing in Cynthia from my insurance company.

Cynthia:  
Can you please send over.

On 3/10/2023 2:48 PM, Boedicker, Kim C wrote:

This message was sent securely using ZixCorp.

Hi Tina-

Your attachment that you provided indicates that endorsement form should be on a "1/95" form (see screen shot below) but I don't see where that endorsement form is located in the attached document. Can you kindly go back to your insurance agency and ask them for that "1/95" form and an umbrella endorsement? The attachment you provided are declarations and the County is looking for the umbrella endorsement form.

It should look just like the general liability endorsement form but it would state "umbrella endorsement" on it.

Hope this helps!

Kim



Coverage Form(s) and Endorsement(s) made a part of t  
**See Enc**

Agent: **AMWINS INSURANCE BROKERAGE LLC (LIVERPO**  
**200 Elwood Davis Road, Suite 200**  
**Liverpool, NY 13088**

Broker: **Gerard P Smith Agency Inc**  
**4 E Main Street**  
**Webster, NY 14580**

**UPD (08-07) THESE DECLARATIONS TOGETHER WITH**  
**COVERAGE PART COVERAGE FORM(S) /**  
**COMPLETE THE ABOVE NUMBERED POL**  
**(Free Trade Zone Statistical Code 2-13000)**

**EXTENSI**

**Policy No. CUP1572065**

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

**Sent:** Friday, March 10, 2023 2:37 PM

**To:** noreply <[noreply@monroecounty.gov](mailto:noreply@monroecounty.gov)>; Boedicker, Kim C <[KimBoedicker@monroecounty.gov](mailto:KimBoedicker@monroecounty.gov)>;  
Smith, Laura M <[LauraSmith@monroecounty.gov](mailto:LauraSmith@monroecounty.gov)>; Case Caico, Rebecca  
<[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>; Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Jocelyn Bassley  
<[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>

**Subject:** Re: Insurance Required- Endorsement for Umbrella Policy

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~~~~~

All:  
See attached.

Attached is the Umbrella policy providing \$1 million coverage, which goes over the General Liability

If this does not suffice - someone needs to define endorsement for me.

On 3/10/2023 12:32 PM, Faye Pelow wrote:

This is an automated email from Monroe County's  
Contract Management System (<http://contractkhq.com>).  
DO NOT REPLY TO THIS EMAIL.

-----  
To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10313/messages/view/71194>

Hi Tina,

We received this feedback on your insurance packet from Kim:

I have confirmed everything except the GL. I let Tina know this on 3/2/23 and 3/7/23 in email: If they are using the umbrella policy to meet the Gen Liability requirement of \$3M aggregate, they would also need to provide an endorsement form for the umbrella policy.

Can you please provide an endorsement for the umbrella policy? Once received, I will add this to the packet and then continue the contract in the routing process.

Thanks!  
Faye

To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10313/messages/view/71194>

Contract Information:

<http://contractkhq.com/contract/10313>

Vendor: Community Resource Collaborative, Inc.  
Contract: ARPA Subaward Grant Agreement - Neighborhood Collaborative Project (NCP)  
Department: Planning and Development  
Division:  
Start Date: 03/01/2023  
End Date: 12/31/2026  
Type: New Contract

-----  
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Tina Paradiso  
Executive Director  
Community Resource Collaborative, Inc.

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--

Tina Paradiso  
Executive Director  
Community Resource Collaborative, Inc.

## Pelow, Faye

---

**From:** Pelow, Faye <FayePelow@monroecounty.gov>  
**Sent:** Monday, March 13, 2023 12:17 PM  
**To:** Boedicker, Kim C  
**Cc:** Case Caico, Rebecca  
**Subject:** FW: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

Hi Kim,

Are you by any chance available for a brief meeting with Tina, Jocelyn and their insurance rep tomorrow afternoon to confirm that they have everything they need to move forward with the contract routing?

Thanks!

### **Dr. Faye Pelow**

*Community Development Initiatives Manager*  
Monroe County Department of Planning & Development  
50 West Main Street, Suite 1150  
Rochester, NY 14614  
(585)753-2033 - Office  
(585)233-2030 - Mobile

**From:** Jocelyn Basley <jrbasley@c3consultancy.org>  
**Sent:** Monday, March 13, 2023 12:04 PM  
**To:** Pelow, Faye <FayePelow@monroecounty.gov>  
**Cc:** Ian Smith <ian@rochesterinsurance.com>; Tina Paradiso <tinap@commresourcecollab.org>  
**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

Good morning Faye,

Tina and I are hoping you can jump on a quick call with us and our insurance agent tomorrow at 4 to review the County requirements and make sure we're all on the same page and have everything in place to move our contract forward. It should be a fairly quick call so thank you in advance for your assistance and time. I'll forward a Google Meet link via a separate email.

On Mon, Mar 13, 2023 at 11:55 AM Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)> wrote:

How about 4:00?

Ian C. Smith, CIC

President & CEO

*"We protect you as if you were family"*

Gerard P Smith Insurance Agency

**4 East Main Street**

**Webster, N.Y. 14580**

585-872-5700 (office)

585-872-2073 (fax)

585-613-5138 (cell)



**[www.RochesterInsurance.com](http://www.RochesterInsurance.com)**

\*\*\*\*Please remember we cannot honor any request to bind and/or effect coverage, alter, and/or amend coverage or terms of any policy via e-mail or voice mail\*\*\*\*

---

**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

**Sent:** Monday, March 13, 2023 11:55 AM

**To:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>; Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>

**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

**EXTERNAL: Proceed with Caution Think before clicking.**



Or before 10:00

On 3/13/2023 11:53 AM, Jocelyn Basley wrote:

I think it's important for you to be there so let's find a time that works for you. Can you do earlier?

On Mon, Mar 13, 2023 at 11:52 AM Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)> wrote:

I cant do 11 - but if everyone else can I am good with that so long as I get the cliff notes.

----- Forwarded Message -----

**Subject:**RE: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

**Date:**Mon, 13 Mar 2023 15:44:11 +0000

**From:**Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>

**To:**Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>

**CC:**Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

Can we do 11:00 tomorrow?

Ian C. Smith, CIC

President & CEO

*"We protect you as if you were family"*

Gerard P Smith Insurance Agency

**4 East Main Street**

**Webster, N.Y. 14580**

585-872-5700 (office)

585-872-2073 (fax)

585-613-5138 (cell)



[www.RochesterInsurance.com](http://www.RochesterInsurance.com)

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**From:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>  
**Sent:** Monday, March 13, 2023 11:14 AM  
**To:** Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Cc:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

**EXTERNAL: Proceed with Caution Think before clicking**

My calendar is open after 3 today and tomorrow between 10:30 and noon. I'm appreciative of your time and expertise but just want to ensure that the County has what they need. 😊

On Mon, Mar 13, 2023, 9:39 AM Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)> wrote:

Hi Jocelyn – I think it would make most sense to have a quick call. Can we do that today?

Ian C. Smith, CIC

President & CEO

*"We protect you as if you were family"*

Gerard P Smith Insurance Agency

**4 East Main Street**

**Webster, N.Y. 14580**

585-872-5700 (office)

585-872-2073 (fax)

585-613-5138 (cell)

\*\*\*\*Please remember we cannot honor any request to bind and/or effect coverage, alter, and/or amend coverage or terms of any policy via e-mail or voice mail\*\*\*\*

---

**From:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>  
**Sent:** Friday, March 10, 2023 3:50 PM  
**To:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Cc:** Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Subject:** [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

---

Ian, thank you for all you've done to support us through this process. Tina knows I'm not an insurance expert and all of this is foreign to me. However I think our program officer Faye Pelow is accustomed to seeing and receiving a specific set of forms. Perhaps if you send a message explaining how their request for a separate endorsement has been fulfilled via the umbrella policy you've provided, you can help us all learn and alleviate any additional confusion or concerns.

----- Forwarded Message -----

**Subject:** Insurance Required- Endorsement for Umbrella Policy  
**Date:** Fri, 10 Mar 2023 12:32:24 -0500  
**From:** Faye Pelow <[noreply@monroecounty.gov](mailto:noreply@monroecounty.gov)>  
**To:** Kim Boedicker <[kimboedicker@monroecounty.gov](mailto:kimboedicker@monroecounty.gov)>, Laura Smith <[LauraSmith@monroecounty.gov](mailto:LauraSmith@monroecounty.gov)>, Rebecca Case Caico <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>, Pelow <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>, Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>, Joc Bassley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>

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DO NOT REPLY TO THIS EMAIL.

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To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10313/messages/view/71194>

Hi Tina,

We received this feedback on your insurance packet from Kim:

I have confirmed everything except the GL. I let Tina know this on 3/2/23 and 3/7/23 in

email: If they are using the umbrella policy to meet the Gen Liability requirement of \$3M aggregate, they would also need to provide an endorsement form for the umbrella policy.

Can you please provide an endorsement for the umbrella policy? Once received, I will add this to the packet and then continue the contract in the routing process.

Thanks!  
Faye

To reply to this message & download attachments, visit:  
<https://contracts.monroecounty.gov/contract/10313/messages/view/71194>

Contract Information:

<http://contracthq.com/contract/10313>

Vendor: Community Resource Collaborative, Inc.  
Contract: ARPA Subaward Grant Agreement - Neighborhood Collaborative Project (NCP)  
Department: Planning and Development  
Division: Start Date: 03/01/2023  
End Date: 12/31/2026  
Type: New Contract

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*Stay safe and be well . . . Best wishes for a fabulous day!*

*Jocelyn Basley, Community Consultant*

*C3 Consultancy Services*

--

Tina Paradiso  
Executive Director  
Community Resource Collaborative, Inc.

--

*Stay safe and be well . . . Best wishes for a fabulous day!*  
*Jocelyn Basley, Community Consultant*  
*C3 Consultancy Services*

## Case Caico, Rebecca

---

**From:** Jocelyn Basley <jrbasley@c3consultancy.org>  
**Sent:** Tuesday, March 14, 2023 4:08 PM  
**To:** Tina Paradiso  
**Cc:** Pelow, Faye; Case Caico, Rebecca; Ian Smith; Boedicker, Kim C  
**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

Ian & Tina - thank you for this last piece of information and with this, I believe we've met and submitted all of the necessary insurance requirements and documentation.

Kim and Faye - I realize there have been multiple emails regarding our insurance coverage documentation so please confirm that you are in receipt of each required item and let me know which if any need to be resent or uploaded.

*Stay safe and be well . . . Best wishes for a fabulous day!*  
*Jocelyn Basley, Community Consultant*  
*C3 Consultancy Services*

On Tue, Mar 14, 2023 at 3:56 PM Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)> wrote:

All:  
Please see attached Umbrella form 1/95.

Thanks!  
Tina

On 3/13/2023 2:27 PM, Pelow, Faye wrote:

[This message was sent securely using ZixCorp.](#)

Hi Jocelyn,

Of course! We all want to get your contract where it needs to be! I spoke to Kim and unfortunately her schedule is very closed over the next few weeks and she is unable to meet. She wanted me to send along the attached document that outlines everything that we require. If you pass this along to your insurance rep, it should hopefully help them to get the full picture of what we are looking for. As far as I know, the last thing that we are waiting for (Per Kim) is the umbrella endorsement on the 1/95 form. Once I have that, I will attach it to

your packet and move it along in the contract routing. If legal requires anything else, they will let us know.

If you still would still like to meet tomorrow, I am happy to do so- just let me know.

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>

**Sent:** Monday, March 13, 2023 12:31 PM

**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>

**Cc:** Boedicker, Kim C <[KimBoedicker@monroecounty.gov](mailto:KimBoedicker@monroecounty.gov)>; Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>; Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>; Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~

Thank you so much for your continued assistance and support. We're hopeful that tomorrow's meeting will help get us across the finish line!



On Mon, Mar 13, 2023 at 12:20 PM Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)> wrote:

[This message was sent securely using ZixCorp.](#)

Hi Jocelyn,

I am checking with Kim to see if she is also available to meet. Kim is more familiar with the Monroe County insurance requirements and what is needed for the routing process so she would have a better idea of whether or not we have everything we need (I believe we are still waiting on the umbrella endorsement on a 1/95 form) to move your contract forward.

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

[50 West Main Street, Suite 1150](#)

[Rochester, NY 14614](#)

[\(585\)753-2033](#) - Office

[\(585\)233-2030](#) - Mobile

**From:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>

**Sent:** Monday, March 13, 2023 12:04 PM

**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>

**Cc:** Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>; Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

**Subject:** Re: [EXTERNAL] Re: Insurance Required- Endorsement for Umbrella Policy

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~~~~~

Good morning Faye,

Tina and I are hoping you can jump on a quick call with us and our insurance agent tomorrow at 4 to review the County requirements and make sure we're all on the same page and have everything in place to move our contract forward. It should be a fairly quick call so thank you in advance for your assistance and time. I'll forward a Google Meet link via a separate email.

On Mon, Mar 13, 2023 at 11:55 AM Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)> wrote:

How about 4:00?

**Ian C. Smith, CIC**

**President & CEO**

*"We protect you as if you were family"*

**Gerard P Smith Insurance Agency**

**[4 East Main Street](#)**

**[Webster, N.Y. 14580](#)**

585-872-5700 (office)

585-872-2073 (fax)

585-613-5138 (cell)



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**From:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Sent:** Monday, March 13, 2023 11:55 AM  
**To:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>; Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Subject:** Re: [EXTERNAL] Re: Insurance Required-Endorsement for Umbrella Policy

**EXTERNAL: Proceed with Caution Think before clicking.**

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Or before 10:00

On 3/13/2023 11:53 AM, Jocelyn Basley wrote:

I think it's important for you to be there so let's find a time that works for you. Can you do earlier?

On Mon, Mar 13, 2023 at 11:52 AM Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)> wrote:

I cant do 11 - but if everyone else can I am good with that so long as I get the cliff notes.

----- Forwarded Message -----

**Subject:** RE: [EXTERNAL] Re: Insurance Required- Endorsement for Umbre  
**Date:** Mon, 13 Mar 2023 15:44:11 +0000  
**From:** Ian Smith <[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**To:** Jocelyn Basley <[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>  
**CC:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>

Can we do 11:00 tomorrow?

**Ian C. Smith, CIC**

**President & CEO**

*"We protect you as if you were  
family"*

**Gerard P Smith Insurance  
Agency**

**4 East Main Street**

**Webster, N.Y. 14580**

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honor any request to bind and/or**

effect coverage, alter, and/or amend coverage or terms of any policy via e-mail or voice mail\*\*\*\*

**From:** Jocelyn Basley  
<[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>  
**Sent:** Monday, March 13, 2023  
11:14 AM  
**To:** Ian Smith  
<[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
**Cc:** Tina Paradiso  
<[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Subject:** Re: [EXTERNAL] Re:  
Insurance Required- Endorsement  
for Umbrella Policy

**EXTERNAL: Proceed with Caution  
Think before clicking**

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My calendar is open after 3 today and tomorrow between 10:30 and noon. I'm appreciative of your time and expertise but just want to ensure that the County has what they need.☺

On Mon, Mar 13, 2023, 9:39 AM  
Ian Smith  
<[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>  
wrote:

Hi Jocelyn – I think it would make most sense to have a quick call. Can we do that today?

**Ian C. Smith, CIC**

**President & CEO**

*"We protect you as if  
you were family"*

**Gerard P Smith  
Insurance Agency**

**4 East Main Street**

**Webster, N.Y.  
14580**

585-872-5700  
(office)

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remember we cannot  
honor any request to  
bind and/or effect  
coverage, alter,  
and/or amend  
coverage or terms of  
any policy via e-mail  
or voice mail\*\*\*\*

**From:** Jocelyn  
Basley  
<[jrbasley@c3consultancy.org](mailto:jrbasley@c3consultancy.org)>

**Sent:** Friday, March  
10, 2023 3:50 PM

**To:** Tina Paradiso  
<[tinap@commresourcescollab.org](mailto:tinap@commresourcescollab.org)>

**Cc:** Ian Smith  
<[ian@rochesterinsurance.com](mailto:ian@rochesterinsurance.com)>

**Subject:**  
[EXTERNAL] Re:  
Insurance Required-  
Endorsement for  
Umbrella Policy

---

Ian, thank you for all  
you've done to  
support us through  
this process. Tina

knows I'm not an insurance expert and all of this is foreign to me. However I think our program officer Faye Pellow is accustomed to seeing and receiving a specific set of forms. Perhaps if you send a message explaining how their request for a separate endorsement has been fulfilled via the umbrella policy you've provided, you can help us all learn and alleviate any additional confusion or concerns.

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**Subject:** Insurance Required- Endorsement for Umbrella Policy  
**Date:** Fri, 10 Mar 2023 12:32:24 -0500  
**From:** Faye Pellow <[noreply@monroecounty.gov](mailto:noreply@monroecounty.gov)>  
Kim Boedicker <[kimboedicker@monroecounty.gov](mailto:kimboedicker@monroecounty.gov)>  
**To:** <[LauraSmith@monroecounty.gov](mailto:LauraSmith@monroecounty.gov)>, Rebecca Case C  
Faye Pellow <[FayePellow@monroecounty.gov](mailto:FayePellow@monroecounty.gov)>, Tina  
Jocelyn Bassley <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>

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Community Resource Collaborative, Inc. Contract: ARP A Subward Grant Agreement - Neighborhood Collaborative Project (NCP)  
Department: Planning and Development Division:  
Start Date: 03/01/2023  
End Date: 12/31/2026  
Type: New Contract

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*Stay safe and be well . . . Best wishes for a  
fabulous day!*

*Jocelyn Basley, Community Consultant*

*C3 Consultancy Services*

--  
Tina Paradiso  
Executive Director  
Community Resource Collaborative, Inc.

--

*Stay safe and be well . . . Best wishes for a fabulous day!*

*Jocelyn Basley, Community Consultant*

*C3 Consultancy Services*

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*Stay safe and be well . . . Best wishes for a fabulous day!*

*Jocelyn Basley, Community Consultant*

*C3 Consultancy Services*

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-- Tina Paradiso  
Executive Director  
Community Resource Collaborative, Inc.



## EXTENSION OF DECLARATIONS

Policy No. CUP1572065

Effective Date: 02/24/2023

12:01 AM STANDARD TIME AT YOUR MAILING ADDRESS

### FORMS AND ENDORSEMENTS

**The following forms apply to the policy**

<i>Endt#</i>	<i>Revised</i>	<i>Description of Endorsements</i>
CUP	07/05	Commercial Umbrella Policy
CUP 549	09/16	Exclusion - Unmanned Aircraft
CUP-542	12/20	Exclusion of War and Certified Acts of Terrorism
IUL100	07/06	Expected or Intended Injury Exclusion
IUL117	09/10	Nuclear Energy Liability Exclusion (Broad Form)
IULNY	06/10	New York Changes
JACKET NY	12/19	Policy Jacket
L-472	07/08	Exclusion - Injury To Performers Or Entertainers
L-536	09/09	Exclusion - Participation In Athletic Activity, Physical Activity Or Sports
L-622	07/08	Abuse Or Molestation Exclusion
TRIADN NY	12/20	Policyholder Disclosure Notice of Terrorism Insurance Coverage
UL370	04/04	Exclusion - Liability As A Result Of Owned Autos

**Pelow, Faye**

---

**From:** noreply-contrackhq@monroecounty.gov  
**Sent:** Friday, March 17, 2023 1:30 AM  
**To:** FayePelow@monroecounty.gov  
**Subject:** Contract Waiting For Your Action (1 Week Notice)

This is an automated email from Monroe County's Contract Management System (<http://contrackhq.com>).  
DO NOT REPLY TO THIS EMAIL.

-----

The following contract requires your action. You are receiving this email because it has been 1 week since the last email sent and no action has been taken. Please use the link provided at the bottom of this email to access this contract.

Reason:

Approval Needed

Waiting Since:

03/10/2023

Vendor: Community Resource Collaborative, Inc.  
Contract: ARPA Subaward Grant Agreement - Neighborhood Collaborative Project (NCP)  
Department: Planning and Development  
Division:  
Start Date: 03/01/2023  
End Date: 12/31/2026  
Type: New Contract

You can access this contract at this address:

<http://contrackhq.com/contract/10313>

-----  
This is an automated email from Monroe County's Contract Management System (<http://contrackhq.com>).  
DO NOT REPLY TO THIS EMAIL.

## Case Caico, Rebecca

---

**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Tuesday, April 4, 2023 10:03 AM  
**To:** Pelow, Faye; Case Caico, Rebecca  
**Cc:** Tina Paradiso; Andy Carey; Dr. Janelle Duda-Banwar; Carmen Allen  
**Subject:** Just a few comments, questions and clarifications re: NCP's ARPA contract

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~  
Good morning Faye and Rebecca,

Thank you for our meeting last Friday and the advancement of our ARPA contract through the County's approval process. In reviewing the final version of the contract, here are a few items that need further clarification:

**EXHIBITS:** Are all of the exhibits referenced in the contract available via the ARPA portal and if not, where might we find copies of those that aren't? For example, exhibits A and B should be our approved action plan and budget/ Would exhibit D be the documents we reviewed last Friday during our data and reporting discussions? Exhibit E is our MWBE plan from Matt, exhibit F was provided with the contract, exhibits I and L provided previously, I believe we signed off on exhibits C, J and K in the portal with our pre-award portal submission however I don't recall seeing or receiving exhibits G, H-1, H-2.

**TERMINOLOGY:** Clearly CRC is the Subrecipient on behalf of NCP. The contract only uses the word subcontract and subcontractor in four locations specific to a federally assisted construction project and/or in reference to the Davis-Bacon Act.

Please confirm the appropriate language CRC should use in referring to each of the NCP partner agencies funded through this award? Our expectation has been partners operating through a memorandum of understanding (MOU) or partnership agreement, a document between two parties that allows each group to outline their expectations of the project and its deliverables, not subcontractors. Similarly, we did not expect the County would need to review the "agreement" between CRC and each of the NCP partner agencies funded through this award, please confirm this as well. However, we will share and review the full contract with each agency so they are aware and understand the obligations and compliance requirements set forth.

**SECTION 23:** what is the definition and dollar limit for micropurchase and/or would this be applicable to NCP?

Looking forward to your response so that we can continue to move this forward!

*Jocelyn Basley, Community Consultant*

**Project Lead for the Neighborhood Collaborative Project (NCP)**

## Case Caico, Rebecca

---

**From:** Pelow, Faye <FayePelow@monroecounty.gov>  
**Sent:** Thursday, April 6, 2023 11:02 AM  
**To:** Neighborhood Collaborative Project; Case Caico, Rebecca  
**Cc:** Tina Paradiso  
**Subject:** RE: Just a few comments, questions and clarifications re: NCP's ARPA contract

Hi Jocelyn,

We are checking in with legal on your questions. We will send you some answers as soon as we have them for you!

Thanks!

**Dr. Faye Pelow**  
*Community Development Initiatives Manager*  
Monroe County Department of Planning & Development  
50 West Main Street, Suite 1150  
Rochester, NY 14614  
(585)753-2033 - Office  
(585)233-2030 - Mobile

**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Thursday, April 6, 2023 10:59 AM  
**To:** Pelow, Faye <FayePelow@monroecounty.gov>; Case Caico, Rebecca <RebeccaCaico@monroecounty.gov>  
**Cc:** Tina Paradiso <tinap@commresourcecollab.org>  
**Subject:** Re: Just a few comments, questions and clarifications re: NCP's ARPA contract

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~  
Good morning ladies, hope your week is going well. Just circling back to see if you have any updates or responses to our earlier email in preparation for our team meeting tomorrow?

*Jocelyn Basley, Community Consultant*  
**Project Lead for the Neighborhood Collaborative Project (NCP)**

On Tue, Apr 4, 2023 at 10:02 AM Neighborhood Collaborative Project <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)> wrote:

Good morning Faye and Rebecca,

Thank you for our meeting last Friday and the advancement of our ARPA contract through the County's approval process. In reviewing the final version of the contract, here are a few items that need further clarification:

## Case Caico, Rebecca

---

**From:** Pelow, Faye <FayePelow@monroecounty.gov>  
**Sent:** Friday, April 7, 2023 11:43 AM  
**To:** Jocelyn Basley  
**Cc:** Case Caico, Rebecca  
**Subject:** Follow Up: ARPA Data Reporting Review- Neighborhood Collaborative Project  
**Attachments:** Data Summary Sheet.docx; mwbe-chq-overview.pdf; Quarterly Data Report Form Final.xlsx; ARPA Data Guidebook- Updated.pdf; NCP- Quarterly Data Report Form Final.xlsx; community Resource Collaborative Budget Year 1.xlsx

Good Morning Jocelyn,

I apologize- I thought I had sent this last week, but looking through my sent messages I am not seeing it. Sending again in case it did not make its way to you!

Thank you again for meeting with us to review the data reporting and budget forms. We have attached all of the documents that we reviewed both in the calendar invitation of the data review meeting and also in this email for your reference. We hope that you find them helpful as you navigate the reporting process!

If you have any questions at any time, please do not hesitate to reach out. We look forward to working with you and are excited to see the impact your program will have on Monroe County!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*  
Monroe County Department of Planning & Development  
50 West Main Street, Suite 1150  
Rochester, NY 14614  
(585)753-2033 - Office  
(585)233-2030 - Mobile

## ARPA REPORTING SUMMARY

Name of Report	Components required	Frequency	Submission Location
Quarterly Report	Data, Action Items	Every 3 months	ARPA Portal
Interim Report	Data, Action Items, Interim Narrative	Annually	ARPA Portal
Annual Report	Data, Action Items, Annual Narrative	Annually	ARPA Portal
MWBE	Status of MWBE Spending	Monthly	ContractHQ
Vouchers	Voucher Budget	Depends on Risk Assignment	ARPA Portal

Risk Assignment	Financial Voucher Minimum Submission Requirements*
HIGH	Monthly
MEDIUM	Every other Month
LOW	Quarterly

\*Regardless of risk assignment, all grantees may voucher as often as monthly.

Components	Requirements
Data	Demographics, services, and outcomes of people served. See ARPA Data Guidebook, Quarterly Data Report Form, Agency Data Report Form.
Action Items	Indicate whether Action Items outlined in Scope of Work are completed. See Action Items sample on next page.
Interim Narrative (1 Page)	<ol style="list-style-type: none"> <li>1. Please describe any budgetary or programmatic variances, potential challenges or victories encountered during reporting period – previous 6 months.</li> <li>2. Do you have any questions, concerns or recommendations you would like to share?</li> </ol>
Annual Narrative (3 Pages)	<ol style="list-style-type: none"> <li>1. Please outline the key programmatic activities of your program, expanding on specific accomplishments over the reporting period – previous year.</li> <li>2. If your program has not met the budgetary or programmatic requirements outlined in your contract, please explain why and how you plan to address it in the future.</li> <li>3. Please describe any new programs, partnerships, or relationships with providers, employers, educational institutions, government entities or nonprofit organizations that your program has built or improved upon during the reporting period.</li> <li>4. Did your program create any jobs? If so, describe.</li> <li>5. Please provide a story, personal account or other narrative that highlights the success of your program and could be highlighted by Monroe County in a public report.</li> <li>6. Do you have any questions, concerns or recommendations you would like to share?</li> </ol>
Voucher Budget	See agency spreadsheet from approved contractual budget.

## ACTION ITEMS

For each quarter, indicate whether or not you have completed the action items you initially outlined in your Scope of Work. This will help us to monitor your progress and ensure compliance with the Federal ARPA regulations. See examples below.

Time Period	Action	Deliverable	Performance Measurement	Has Performance Measurement Been Met This quarter?	Unique Individuals Served	Supporting Documents	Comments
	<i>(e.g., hire 2 new staff members for the project)</i>  <i>*this will pull from your initial survey</i>	<i>(e.g., deliver staffing plan to County)</i>  <i>*this will pull from your initial survey</i>	<i>(e.g., Subawardee is fully staffed to manage project)</i>  <i>*this will pull from your initial survey</i>	<i>(Check Yes or No)</i>	<i>(input number of unique individuals you have served for this part of the program in this quarter)</i>	<i>(Upload training documents, agendas, marketing flyers etc. to demonstrate how your deliverables have been met. You do not need to include receipts as these will have been included during the vouchering process.)</i>	<i>(Provide commentary on your progress this quarter. If you did not quite meet your performance measurement, explain what factors contributed to that discrepancy. If you exceeded expectations, you can provide some further details about your success.)</i>
2023 2 <sup>nd</sup> Quarter	Equip new office space	Purchased office supplies, enrolled with utilities, acquired internet and bought office furniture; provided invoices to County for reimbursement	Office space will be ready to serve Monroe County residents by 7/1	✓ Yes	N/A	* Copy of lease  * Copy of invitation to stakeholders inviting them to grand opening of new space	We obtained a new office space which was ready to serve Monroe County residents on 6/15/23. We provided monthly vouchers to the County for all corresponding expenses. Since it opened, we have served 25 individuals in the space.
2023 3 <sup>rd</sup> Quarter	Increase access to healthcare by providing <u>population served</u> (specify for your program-veterans/seniors/families/youth etc.)  access to at least 3 preventative	Provide transportation, referrals, counseling, training and other support to <u>population served</u> .	150 <u>population served</u> will access healthcare screens and/or mental health services.	✓ No	100	* Copy of updated brochure  * Outreach event schedule  * List of training events and corresponding materials	Though we increased our outreach to <u>population served</u> by 50% this quarter, we found it difficult to get individuals to attend healthcare screens or actively pursue mental health services. We did increase our referral rate significantly and have joined forces with 3 additional community

	ve healthcare screens and/or mental health services.						partners. We hope that this number will increase in the next quarter to match our ARPA goals.
2023 4 <sup>th</sup> Quarter	Hire Program Staff	Hire Executive Director, Program Coordinator, Administrative Assistant; deliver staffing plan to County	Project is fully staffed	✓ Yes	N/A	*Staffing Plan *Resume of new hires	Our program is now fully staffed per the ARPA Scope of Work.

## 2023

April	Vouchers (High)
17	MWBE (ALL)
May	Vouchers (High/Medium)
15	MWBE (ALL)
June	Vouchers (High)
15	MWBE (ALL)
July	Interim Report (ALL)
17	Vouchers (High/Medium/Low)
	MWBE (ALL)
August	Vouchers (High)
15	MWBE (ALL)
September	Vouchers (High/Medium)
15	MWBE (ALL)
October	Quarterly Report (ALL)
17	Vouchers (High/Low)
	MWBE (ALL)
November	Vouchers (High/Medium)
15	MWBE (ALL)
December	Vouchers (High)
15	MWBE (ALL)



# 2024

January  
16  
Annual Report (ALL)  
Vouchers (High/Medium/Low)  
MWBE (ALL)

February  
15  
Vouchers (High)  
MWBE (ALL)

March  
15  
Vouchers (High/Medium)  
MWBE (ALL)

April  
15  
Quarterly Report (ALL)  
Vouchers (High/Low)  
MWBE (ALL)

May  
15  
Vouchers (High/Medium)  
MWBE (ALL)

June  
17  
Vouchers (High/Low)  
MWBE (ALL)

July  
15  
Interim Report (ALL)  
Vouchers (High/Medium/Low)  
MWBE (ALL)

August  
15  
Vouchers (High)  
MWBE (ALL)

September  
16  
Vouchers (High/Medium)  
MWBE (ALL)

October  
15  
Quarterly Report (ALL)  
Vouchers (High/Low)  
MWBE (ALL)

November  
15  
Vouchers (High/Medium)  
MWBE (ALL)

December  
16  
Vouchers (High)  
MWBE (ALL)

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# 2025

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<b>January</b> 16	Annual Report (ALL) Vouchers (High/Medium/Low) MWBE (ALL)
<b>February</b> 17	Vouchers (High) MWBE (ALL)
<b>March</b> 17	Vouchers (High/Medium) MWBE (ALL)
<b>April</b> 15	Quarterly Report (ALL) Vouchers (High/Low) MWBE (ALL)
<b>May</b> 15	Vouchers (High/Medium) MWBE (ALL)
<b>June</b> 16	Vouchers (High/Low) MWBE (ALL)
<b>July</b> 15	Interim Report (ALL) Vouchers (High/Medium/Low) MWBE (ALL)
<b>August</b> 15	Vouchers (High) MWBE (ALL)
<b>September</b> 15	Vouchers (High/Medium) MWBE (ALL)
<b>October</b> 15	Quarterly Report (ALL) Vouchers (High/Low) MWBE (ALL)
<b>November</b> 17	Vouchers (High/Medium) MWBE (ALL)
<b>December</b> 15	Vouchers (High) MWBE (ALL)

# 2026

January  
15  
Annual Report (ALL)  
Vouchers (High/Medium/Low)  
MWBE (ALL)

February  
17  
Vouchers (High)  
MWBE (ALL)

March  
16  
Vouchers (High/Medium)  
MWBE (ALL)

April  
15  
Quarterly Report (ALL)  
Vouchers (High)  
MWBE (ALL)

May  
15  
Vouchers (High/Medium)  
MWBE (ALL)

June  
15  
Vouchers (High/Low)  
MWBE (ALL)

July  
15  
Interim Report (ALL)  
Vouchers (High/Medium/Low)  
MWBE (ALL)

August  
17  
Vouchers (High)  
MWBE (ALL)

September  
15  
Vouchers (High/Medium)  
MWBE (ALL)

October  
15  
Quarterly Report (ALL)  
Vouchers (High/Low)  
MWBE (ALL)

November  
16  
Vouchers (High/Medium)  
MWBE (ALL)

December  
15  
Vouchers (High)  
MWBE (ALL)

January 15  
2027  
FINAL REPORT (ALL)  
FINAL VOUCHER (ALL)  
FINAL MWBE (ALL)

Demographics									
UNIQUE ID	First Date Served	Most Recent Date Served	Services Ongoing/Complete	Entry Point for Services	AGE	RACE/ETHNICITY	GENDER IDENTITY	DISABILITY	VETERAN
Input	Input	Input	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1
						Caucasian/White; African-American/Black; Latino or Hispanic; Asian; Native American; Native Hawaiian or Pacific Islander; Two or more; Other/Unknown; Prefer not to say	Male; Female; Gender Queer or Non-Binary; A gender not specified; Prefer not to say	Yes; No; Prefer not to say	Yes; No; Prefer not to say
			Open; Closed; Reopened	Mobile Unit; Onsite Location; Outreach Event; Partner Site	under 18; 18-24; 25-34; 35-44; 45-54; 55-64; 65+				



PLACED IN TRAINING 3	TRAINING COMPLETED 3	PLACED IN TRAINING 4	TRAINING COMPLETED 4	PLACED IN TRAINING 5	TRAINING COMPLETED 5	PLACED IN TRAINING 6	TRAINING COMPLETED 6	PLACED IN TRAINING 7
Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1
Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology



### Output- In-House Trainings/Programs

TRAINING COMPLETED 7	PLACED IN TRAINING 8	TRAINING COMPLETED 8	PLACED IN TRAINING 9	TRAINING COMPLETED 9	PLACED IN PROGRAM 1	PROGRAM COMPLETED 1	PLACED IN PROGRAM 2	PROGRAM COMPLETED 2
Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No
	Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development	

PLACED IN PROGRAM 3	PROGRAM COMPLETED 3	PLACED IN PROGRAM 4	PROGRAM COMPLETED 4	PLACED IN PROGRAM 5	PROGRAM COMPLETED 5	PLACED IN PROGRAM 6	PROGRAM COMPLETED 6	PLACED IN PROGRAM 7
Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1
Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development



		Output - Community F						
PROGRAM COMPLETED 7	PROGRAM COMPLETED IN PROGRAM 8	PROGRAM COMPLETED 8	COMMUNITY RESOURCES OFFERED - Child Care	COMMUNITY RESOURCES OFFERED - Food	COMMUNITY RESOURCES OFFERED - Financial	COMMUNITY RESOURCES OFFERED - Housing	COMMUNITY RESOURCES OFFERED - Language	COMMUNITY RESOURCES OFFERED - Employment
Yes/No	Choose 1	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
	Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development							

Resources Offered							Outcome - Employ		
COMMUNITY RESOURCES OFFERED - Legal	COMMUNITY RESOURCES OFFERED - Physical Health	COMMUNITY RESOURCES OFFERED - Mental/ Behavioral Health	COMMUNITY RESOURCES OFFERED - Social Services	COMMUNITY RESOURCES OFFERED - Technology	COMMUNITY RESOURCES OFFERED - Other	OBTAINED JOB	LIST NEW EMPLOYER	INDUSTRY OF NEW EMPLOYER	
Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Input	Choose One	
								Agriculture; Arts; Business/Finance; Construction; Education; Government; Health; Legal; Life Sciences; Manufacturing; Media; Not-for-Profit; Optics/Photonics/ima ging; Service; Skilled Trades; Software/IT; Utilities; Other	

ment		Outcome- Housing					Outco
LEVEL OF EMPLOYMENT	LIST NEW INDIVIDUAL ANNUAL INCOME/SALARY	OBTAINED HOUSING	TYPE OF HOUSING OBTAINED	ZIP CODE OF HOUSING	IS THIS TEMPORARY HOUSING?	IF THIS IS TEMPORARY HOUSING, INDICATE LENGTH OF AVAILABLE STAY	OBTAINED IMPROVED TRANSPORTATION 1
Choose one	Input \$	Yes/No	Choose one	Input	Yes/No	Choose one	Choose one
Full Time; Part Time			Apartment; Permanent Supportive Housing; Single Family Home; Transitional Housing			Less than 1 Month; 1-6 Months; 6-12 Months; 1-2 Years; 2+ Years	Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport



Outcome- Transportation		Outcome- Food	Outcome- Education				
OBTAINED IMPROVED TRANSPORTATION 2	OBTAINED IMPROVED TRANSPORTATION 3	TYPE OF FOOD SUPPORT	ENROLLED IN EDUCATIONAL COURSEWORK 1	OBTAINED EDUCATIONAL MILESTONE 1	AREA OF EXPERTISE 1	ENROLLED IN EDUCATIONAL COURSEWORK 2	OBTAINED EDUCATIONAL MILESTONE 2
Choose one	Choose one	Choose one	Choose One	Choose One	Input	Choose One	Choose One
Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport	Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport	Short-term; Long-term; Short & Long term	HSE, High School Diploma; Educational Certificate; ESOL Certification; Skilled Trades Certification; Associates Degree; Bachelor's Degree	HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; Completed Coursework; Associates Degree; Bachelors Degree		HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; ESOL Certification; Skilled Trades Certification; Associates Degree; Bachelor's Degree	HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; Completed Coursework; Some Associates Degree; Bachelors Degree



Outcome-Health Care						
AREA OF EXPERTISE 2	OBTAINED PHYSICAL HEALTH SERVICES 1	OBTAINED PHYSICAL HEALTH SERVICES 2	OBTAINED PHYSICAL HEALTH SERVICES 3	OBTAINED PHYSICAL HEALTH SERVICES 4	OBTAINED BEHAVIORAL/MENTAL HEALTH SERVICES 1	OBTAINED BEHAVIORAL/MENTAL HEALTH SERVICES 2
Input	Choose One	Choose One	Choose One	Choose One	Choose One	Choose One
	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support	Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support

Outcome-Finances					Outcome - Community Engagement
	IMPROVED HOUSEHOLD FINANCES - Increased Yearly Income Input Yearly Increase \$	IMPROVED HOUSEHOLD FINANCES - Decreased Yearly Expenses Input Yearly Decrease \$	SOURCE OF YEARLY INCOME INCREASE OR EXPENSE DECREASE Input	OBTAINED LOAN/GRANT Choose one	
Choose One				LOAN/GRANT AMOUNT Input \$	ENHANCED ENGAGEMENT OR LEADERSHIP WITH COMMUNITY Choose one
Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support				Business Capital; Home Improvement; MWBE Business Capital; Vehicle; Other	Volunteers/supports agency program; Volunteers/supports unaffiliated community program or organization; Other





Demographics									
UNIQUE ID	First Date Served	Most Recent Date Served	Services Ongoing/Complete etc	Entry Point for Services	AGE	RACE/ETHNICITY	GENDER IDENTITY	DISABILITY	VETERAN
Input	Input	Input	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1	Choose 1
						Caucasian/White; African-American/Black; Latino or Hispanic; Asian; Native American; Native Hawaiian or Pacific Islander; Two or more; Other/Unknown; Prefer not to say	Male; Female; Gender Queer or Non-Binary; A gender not specified; Prefer not to say	Yes; No; Prefer not to say	Yes; No; Prefer not to say
			Open; Closed; Reopened	Mobile Unit; Onsite Location; Outreach Event; Partner Site	under 18; 18-24; 25-34; 35-44; 45-54; 55-64; 65+				



LGBTQIA+		INDIVIDUAL YEARLY INCOME	HOUSEHOLD YEARLY INCOME	# OF HOUSEHOLD MEMBERS	PREFERRED LANGUAGE	ZIP CODE	PLACED IN TRAINING 1	TRAINING COMPLETED 1	PLACED IN TRAINING 2	TRAINING COMPLETED 2
Choose 1	Input	Input	Input	Input	Input	Input	Choose 1	Yes/No	Choose 1	Yes/No
Yes; No; Prefer not to say							Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology	

PLACED IN TRAINING 3	TRAINING COMPLETED 3	PLACED IN TRAINING 4	TRAINING COMPLETED 4	PLACED IN TRAINING 5	TRAINING COMPLETED 5	PLACED IN TRAINING 6	TRAINING COMPLETED 6	PLACED IN TRAINING 7
Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1
Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology

**Output- In-House Trainings/Programs**

TRAINING COMPLETED 7	PLACED IN TRAINING 8	TRAINING COMPLETED 8	PLACED IN TRAINING 9	TRAINING COMPLETED 9	PLACED IN PROGRAM 1	PROGRAM COMPLETED 1	PLACED IN PROGRAM 2	PROGRAM COMPLETED 2
Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No
	Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Academic Advancement; Citizen Prep; Culture; Employment; Financial; Health; Language; Personal Development; Technology		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development	



PLACED IN PROGRAM 3	PROGRAM COMPLETED 3	PLACED IN PROGRAM 4	PROGRAM COMPLETED 4	PLACED IN PROGRAM 5	PROGRAM COMPLETED 5	PLACED IN PROGRAM 6	PROGRAM COMPLETED 6	PLACED IN PROGRAM 7
Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1	Yes/No	Choose 1
Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development		Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development

Output - Community R								
PROGRAM COMPLETED 7	PROGRAM COMPLETED IN PROGRAM 8	PROGRAM COMPLETED 8	COMMUNITY RESOURCES OFFERED - Day Care	COMMUNITY RESOURCES OFFERED - Food	COMMUNITY RESOURCES OFFERED - Financial	COMMUNITY RESOURCES OFFERED - Housing	COMMUNITY RESOURCES OFFERED - Language	COMMUNITY RESOURCES OFFERED - Employment
Yes/No	Choose 1	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
	Food; Health and Wellness; Individual Coaching/ Mentoring/ Counseling; Loan/Grant; Peer Support; Public Safety; Transportation; Workforce Development							



Resources Offered							Outcome - Employ		
COMMUNITY RESOURCES OFFERED - Legal	COMMUNITY RESOURCES OFFERED - Physical Health	COMMUNITY RESOURCES OFFERED - Mental/ Behavioral Health	COMMUNITY RESOURCES OFFERED - Social Services	COMMUNITY RESOURCES OFFERED - Technology	COMMUNITY RESOURCES OFFERED - Other	OBTAINED JOB	LIST NEW EMPLOYER	INDUSTRY OF NEW EMPLOYER	
Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Input	Choose One	
									Agriculture; Arts; Business/Finance; Construction; Education; Government; Health; Legal; Life Sciences; Manufacturing; Media; Not-for-Profit; Optics/Photonics/ima ging; Service; Skilled Trades; Software/IT; Utilities; Other

ment		Outcome- Housing						Outco
LEVEL OF EMPLOYMENT	LIST NEW INDIVIDUAL ANNUAL INCOME/SALARY	OBTAINED HOUSING	TYPE OF HOUSING OBTAINED	ZIP CODE OF HOUSING	IS THIS TEMPORARY HOUSING?	IF THIS IS TEMPORARY HOUSING, INDICATE LENGTH OF AVAILABLE STAY	OBTAINED IMPROVED TRANSPORTATION 1	
Choose one	Input \$	Yes/No	Choose one	Input	Yes/No	Choose one	Choose one	
Full Time; Part Time			Apartment; Permanent Supportive Housing; Single Family Home; Transitional Housing			Less than 1 Month; 1-6 Months; 6-12 Months; 1-2 Years; 2+ Years	Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport	



Outcome- Transportation		Outcome- Food	Outcome- Education				
OBTAINED IMPROVED TRANSPORTATION 2	OBTAINED IMPROVED TRANSPORTATION 3	TYPE OF FOOD SUPPORT	ENROLLED IN EDUCATIONAL COURSEWORK 1	OBTAINED EDUCATIONAL MILESTONE 1	AREA OF EXPERTISE 1	ENROLLED IN EDUCATIONAL COURSEWORK 2	OBTAINED EDUCATIONAL MILESTONE 2
Choose one	Choose one	Choose one	Choose One	Choose One	Input	Choose One	Choose One
Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport	Bus Passes; Car Access; Car Leased/Purchased; Employment Transport; Medical Transport; Obtain Driver's License; Other Special Needs Transport	Short-term; Long-term; Short & Long term	HSE, High School Diploma; Educational Certificate; ESOL Certification; Skilled Trades Certification; Associates Degree; Bachelor's Degree	HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; Completed Coursework; Associates Degree; Bachelors Degree		HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; ESOL Certification; Completed Coursework; Some Associates Degree; Bachelors Degree	HSE, High School Diploma; ESOL Certification; Skilled Trades Certification; Educational Certificate; Completed Coursework; Some Associates Degree; Bachelors Degree



**Outcome-Health Care**

AREA OF EXPERTISE 2	OBTAINED PHYSICAL HEALTH SERVICES 1	OBTAINED PHYSICAL HEALTH SERVICES 2	OBTAINED PHYSICAL HEALTH SERVICES 3	OBTAINED PHYSICAL HEALTH SERVICES 4	OBTAINED BEHAVIORAL/MENTAL HEALTH SERVICES 1	OBTAINED BEHAVIORAL/MENTAL HEALTH SERVICES 2
Input	Choose One	Choose One	Choose One	Choose One	Choose One	Choose One
	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Created Pathway to Core Medical Care; Created Pathway to Specialized Medical Care; Substance Use Support; Insurance Coverage Obtained/Expanded	Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support	Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support

Outcome-Finances					Outcome - Community Engagement
	IMPROVED HOUSEHOLD FINANCES - Increased Yearly Income Input Yearly Increase \$	IMPROVED HOUSEHOLD FINANCES - Decreased Yearly Expenses Input Yearly Decrease \$	SOURCE OF YEARLY INCOME INCREASE OR EXPENSE DECREASE Input	OBTAINED LOAN/GRANT Choose one	LOAN/GRANT AMOUNT Input \$
OBTAINED BEHAVIORAL/MENTAL HEALTH SERVICES 3					
Choose One				Choose one	Choose one
Obtained short-term or emergency mental/behavioral health intervention; Established ongoing relationship with mental/behavioral health professional; Attends ongoing group support				Business Capital; Home Improvement; MWBE Business Capital; Vehicle; Other	Volunteers/supports agency program; Volunteers/supports unaffiliated community program or organization; Other



## Case Caico, Rebecca

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**From:** Neighborhood Collaborative Project <neighborhoodcollaborative@gmail.com>  
**Sent:** Wednesday, April 12, 2023 10:42 AM  
**To:** Pelow, Faye  
**Cc:** Case Caico, Rebecca; Tina Paradiso  
**Subject:** Re: Just a few comments, questions and clarifications re: NCP's ARPA contract

CAUTION: This email originated from outside Monroe County systems. Exercise caution when opening attachments or clicking links, especially from unknown senders.

~~~~~  
Any updates? We are anxiously awaiting and ready to proceed in order to meet the April 17th invoice submission deadline. Please advise.

*Jocelyn Basley, Community Consultant*  
**Project Lead for the Neighborhood Collaborative Project (NCP)**

On Fri, Apr 7, 2023 at 11:37 AM Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)> wrote:

This message was sent securely using Zix

Hi Jocelyn,

Our ARPA legal representative is out of the office today so unfortunately we will not have answers for you this morning. I just wanted to let you know as you plan for your meeting today. We will get back to you as soon as we can with answers to your questions below.

Thank you!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

(585)233-2030 - Mobile

**From:** Pelow, Faye  
**Sent:** Thursday, April 6, 2023 11:02 AM  
**To:** 'Neighborhood Collaborative Project' <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>; Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>  
**Cc:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Subject:** RE: Just a few comments, questions and clarifications re: NCP's ARPA contract

Hi Jocelyn,

We are checking in with legal on your questions. We will send you some answers as soon as we have them for you!

Thanks!

**Dr. Faye Pelow**

*Community Development Initiatives Manager*

Monroe County Department of Planning & Development

50 West Main Street, Suite 1150

Rochester, NY 14614

(585)753-2033 - Office

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**From:** Neighborhood Collaborative Project <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)>  
**Sent:** Thursday, April 6, 2023 10:59 AM  
**To:** Pelow, Faye <[FayePelow@monroecounty.gov](mailto:FayePelow@monroecounty.gov)>; Case Caico, Rebecca <[RebeccaCaico@monroecounty.gov](mailto:RebeccaCaico@monroecounty.gov)>  
**Cc:** Tina Paradiso <[tinap@commresourcecollab.org](mailto:tinap@commresourcecollab.org)>  
**Subject:** Re: Just a few comments, questions and clarifications re: NCP's ARPA contract

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Good morning ladies, hope your week is going well. Just circling back to see if you have any updates or responses to our earlier email in preparation for our team meeting tomorrow?

*Jocelyn Basley, Community Consultant*

**Project Lead for the Neighborhood Collaborative Project (NCP)**

On Tue, Apr 4, 2023 at 10:02 AM Neighborhood Collaborative Project <[neighborhoodcollaborative@gmail.com](mailto:neighborhoodcollaborative@gmail.com)> wrote:

Good morning Faye and Rebecca,

Thank you for our meeting last Friday and the advancement of our ARPA contract through the County's approval process. In reviewing the final version of the contract, here are a few items that need further clarification:

**EXHIBITS:** Are all of the exhibits referenced in the contract available via the ARPA portal and if not, where might we find copies of those that aren't? For example, exhibits A and B should be our approved action plan and budget/ Would exhibit D be the documents we reviewed last Friday during our data and reporting discussions? Exhibit E is our MWBE plan from Matt, exhibit F was provided with the contract, exhibits I and L provided previously, I believe we signed off on exhibits C, J and K in the portal with our pre-award portal submission however I don't recall seeing or receiving exhibits G, H-1, H-2.

**TERMINOLOGY:** Clearly CRC is the Subrecipient on behalf of NCP. The contract only uses the word subcontract and subcontractor in four locations specific to a federally assisted construction project and/or in reference to the Davis-Bacon Act.

Please confirm the appropriate language CRC should use in referring to each of the NCP partner agencies funded through this award? Our expectation has been partners operating through a memorandum of understanding (MOU) or partnership agreement, a document between two parties that allows each group to outline their expectations of the project and its deliverables, not subcontractors. Similarly, we did not expect the County would need to review the "agreement" between CRC and each of the NCP partner agencies funded through this award, please confirm this as well. However, we will share and review the full contract with each agency so they are aware and understand the obligations and compliance requirements set forth.

SECTION 23: what is the definition and dollar limit for micropurchase and/or would this be applicable to NCP?

Looking forward to your response so that we can continue to move this forward!

*Jocelyn Basley, Community Consultant*

**Project Lead for the Neighborhood Collaborative Project (NCP)**

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## Case Caico, Rebecca

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**From:** Pelow, Faye <FayePelow@monroecounty.gov>  
**Sent:** Tuesday, April 25, 2023 3:24 PM  
**To:** Alexandra Cicero; Clark, Allison; Alyssa Whitfield; Amy DAmico; Liss, Ana J; agramham@rawny.org; AnneByer; Annie Wells; Carol Tegas; Carolyn Hunt; Chad Rieflin; Diana Pryntz; Elizabeth McDade; Erin DiCesare; Gerard Hunt; Gerard Hunt 2; hdiaz@badenstreet.org; Jeffrey Kaczorowski; Jennifer Sahrle; Jessica Kingsley; jwilson19@trilliumhealth.org; Jocelyn Basley; Katherine Rogala; Kelly Coleman; KEREEM BERRY (kberry@rocmapp.org); Laura Merkl; Laura Stradley; Istradley@vocroc.org; Lisa Mattoon; Meaghan D; MichaelColeman; Pat Drake; Rebecca Ferri; Mikell, Rokele; rthomas@badenstreet.org; Sherita Bullock; StephSaph; Suzanne Nye; Sciarabba, Tony; Tree.Clemonds@dor.org; Wayne Rainey  
**Cc:** Case Caico, Rebecca; Adell, Cynthia  
**Subject:** Final Data Report File and Guidebook  
**Attachments:** Quarterly Data Report Form Final.xlsx; ARPA Data Guidebook- Updated.pdf

Good Afternoon All,

Thank you all again for meeting with us to discuss the data reporting. After our meetings with you, we did make a few changes to the original version of the Data Report Form. Attached is the most updated file that incorporates all of your helpful suggestions and feedback. Also included is an updated version of the Guidebook. Please let us know if you have any questions about the excel file or the guidebook.

Please also note (since a few have asked) that in order for the file to be compatible with the portal, you are not able to combine columns or change any of the terminology as written to specifically fit to your program. We ask that you find the term that you can most closely relate to your training or program. If you have a question about this or are unsure of how to classify an aspect of your project, please feel free to reach out at any time and we will work with you to find the appropriate designation.

Thank you!

**Dr. Faye Pelow**  
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