

LOS ANGELES COUNTY DEPARTMENT OF MENTAL HEALTH
MHSA OUTREACH AND ENGAGEMENT SPENDING PLAN INSTRUCTIONS
as of 9-7-23

Directions: Spending Plans and All Backup Documentation Must Be Submitted to poeadmin@dmh.lacounty.gov for review and processing. Forms submitted to other email addresses will not be processed.

- 1. Spending Plans are specific to one event. Please complete one form per event

- 2. Spending plans are due at least 60 days prior to the event**
- 3. Spending plans must be signed by the SA District Chief and SA Analyst and the North/South County Lead Analyst prior to review and approval by MHSA Administration and Oversight Division.

- 5. When submitting a spending plan to MHSA Admin for processing, it must include the following back up documents:
 - 5.1 A formal itemized quote from any vendor in which goods or services will be purchased with requested POE funding (all vendors used must have a County WebVen Number)

 - 5.2 An Updated Annual Event Tracking Form with the list of events for the unit, including the event that funding is being requested

 - 5.3 An Updated PTS Tracking Log, including the event that funding is being requested

 - 5.4 An Updated Monthly Expenditure Summary Form, including the event that funding is being requested
 - 5.5 If Promotional Items (Swag) are being requested for the event, the Promotional (Swag) Request Form must also be completed and submitted. (Note: If an event only requires swag the swag request must still be completed)
- 6. Purchase of Gift Cards will not be approved for POE funding requests. If giveaways are needed for an event, please identify items that will be ordered through PTS (household goods, nonperishable food bags, etc.)

Program Allocation

- Clergy Engagement: \$10,000 (per Service Area)

- Health Neighborhoods: \$12,500 (per Service Area)

- SA Events (For Administration): \$10,000 (per Service Area)

- SALTs Community Events: \$50,000

- FBAC: \$350,000

- Wellness Outreach Workers (WOW): \$8,500

Note:The programs listed below are PEI funded and therefore not eligible for POE allocations. These programs can request promotional items through POE.

- Peer Resource Center/Peer Services

- Promoters

- Support Groups in Spanish & Latino Community Outreach Program

Purchasing Policy & Procedures - 14.1.4.2 Fragmenting (Split Purchasing)

Serial and fragmented purchasing are strictly prohibited. Serial purchasing is the practice of issuing a series of orders within a short period of time to the same vendor for the same or similar items or services to avoid the appropriate competitive process.

Fragmented purchasing is generally understood to be the intentional splitting of requisitions for like items or services to avoid the appropriate competitive process. It differs from serial purchasing in that the fragmented purchases usually occur at the same time, and the items may not be identical, but they are typically related by project or commodity.

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Avoiding fragmentation requires departments to consider the total value of all similar requirements for items or services that will be solicited during the same time from the same group of vendors when determining which type of solicitation to conduct. This means that if a department is aware that they will need \$2,000 worth of widgets this month and \$4,000 next month, they must combine those needs into a single procurement at the \$6,000 value. Some other examples of artificial fragmentation:

- *A department conducts five separate procurements to obtain five office tables for \$2,500 using informal bids. The department should have submitted a requisition for a formal bid process for the \$12,500 procurement.
- *In one day, a department makes multiple purchases for same or similar items from the same vendor, or multiple vendors for a value below the competitive threshold each purchase; but, had the total value of all purchase orders been taken into consideration, a competitive bid would have been required.
- *Fragmentation of needs, or splitting needs into different procurements, sometimes may be appropriate. When in doubt, discussion with the Purchasing Agent is recommended.

Quotes

PURCHASE VALUE	APPLICABLE INFORMATION (Non-Agreement requests)
Up to \$1,500	One quote is required.
\$1,501 to \$5,000	Three bids are required. Use DMH Solicitation for quote template to request three quotes. When using a certified Preference Program Entity (PPE) vendor to fulfill the requirement one PPE vendor quote is needed.
5,001 to 10,000	Three bids are required. Use DMH Solicitation for quote template to request three quotes. When using a certified Preference Program Entity (PPE) vendor to fulfill the requirement two PPE vendor quotes are needed.
\$10,000+	Limited to the Purchasing Agent.

Note: Sole Source requests \$5,000.00 or greater are processed by ISD.

5.1 A formal itemized quote from any vendor in which goods or services will be purchased with requested POE funding (all vendors used must have a County WebVen Number)

**QUOTES ARE NEEDED FOR ANY ITEM
TO BE PURCHASED BY A VENDOR...
DON'T FORGET YOUR QUOTES!**

Requesting Unit:

Cost Center: _____

Service Area Analyst:

Service Area:

[illegible]

Cost Center: _____

Service Area: _____

[illegible]

POE - ANNUAL SPENDING PLAN SUMMARY

Requesting Unit: _____

Cost Center: _____

Service Area Analyst: _____

Service Area: _____

Enter cost of each monthly event in appropriate column below:

Month	Clergy Engagement	Health Neighborhood	SA Community Collaborations	SALT	FBAC	WOW
July						
August						
September						
October						
November						
December						
January						
February						
March						
April						
May						
June						
Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total Annual O&E Costs: \$0.00

SERVICE AREA APPROVAL

Signature & Date
DMH Service Area Chief

Signature & Date
SA Analyst

North/South County
Lead Analyst

MHSA APPROVAL

MHSA Analyst

MHSA Program

DMH Staff Name:





Event Name:

Unit/Division:

Event Date:

Service Area:

Date Swag Requested (Date Form Completed and Submitted:

ITEM DETAIL			PROGRAM STAFF COMPLETE	MHSA ADMIN STAFF COMPLETE			
PHOTO	ITEM	Comments/color options	QUANTITY REQUEST	QUANTITY PROVIDED	DATE PICKED UP	PROGRAM STAFF PICK UP PRINTED NAME	PROGRAM STAFF PICK UP SIGNATURE
1 	Hand Sanitizer	Made in FDA registered facility, Prop 65 compliant. Full color label. Clear or black plastic cases, 70% alcohol by volume					
2 	Lip Balm	This SPF15 lip balm complies with all FDA monographs for personal care products; manufactured in an FDA registered facility domestically.					
3 	Sunscreen SPF 30	1.9 oz. Made in FDA registered facility meets FDA standards for broad spectrum, this is also reef friendly.					
4 	Mints	Produced in the united states in FDA registered facility. Choose from Cinnamon (Pink) and Peppermint (White), each case comes with 25 toothpicks					

DMH Staff Name:



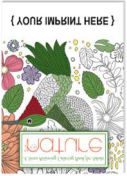

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Unit/Division:

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5 	Wild Smilez Ballpoint Pen	Red Blue Lime Green Orange Purple					
6 	Stackable Colored Pencil (ONLY DISTRIBUTED WITH ADULT COLORING BOOKS)						
7 	Color Comfort Coloring Book for Adults	Themes: Oceans, patterns, nature, zen doodle, animals, brighter minds					
8 	Crayon Fun Pack (ONLY DISTRIBUTED WITH CHILDREN'S COLORING BOOKS)	Blank/undecorated					

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<div>9</div> 	Fun Time Coloring Book	1 color imprint on the front cover					
	Stress Reliever	black, blue, burgundy, red, gold, green, orange, pink, purple, silver, teal, white, sunshine					
<div>10</div> 	Power Clip with Magnet	Variuos colors available, see picture					
<div>11</div> 							

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12		Sandwich Fan with Wooden Handle (PRIDE BRANDED ONLY)	Only PRIDE BRANDING AVAILABLE				
13		Cooling Towel	Only Blue and Black				
14		Charging Cables with Phone Stand (minimum 100)	black, royal blue, lime, orange, red, white, incoming stock of 01/09/2023 One color imprint				

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15 	Bracelet	Silicone color filled wristbands various wristband colors are available					
16 	Pop Socket	Swappable Popsocket - new design allows for wireless charging					
17 	Notepad with Pen	Black, lime green, and blue Size is 5.5"x7.25"					
18 	Clear Tote						