

# Administrative Office of the Courts

Supreme Court of New Mexico

Arthur W. Pepin, Director

Kristen Frueh Leyba,  
Statewide Program Manager  
505-470-9505  
[aockrf@nmcourts.gov](mailto:aockrf@nmcourts.gov)



237 Don Gaspar, Rm 25  
Santa Fe, NM 87501

## **SAFE EXCHANGE AND SUPERVISED VISITATION PROGRAM San Miguel, Mora, and Guadalupe Counties Provider Request for Letters of Interest**

The Administrative Office of the Courts (AOC) invites letters from all professionals (Offerors) interested in providing supervised visitation and exchange services in accordance with the specifications contained in this Request for Letters of Interest (RLI). The purpose of this Request for Letters of Interest is to establish a contract for a Safe Exchange and Supervised Visitation (SESV) program to provide support services for domestic relations cases for the Fourth Judicial District Court in San Miguel, Mora, and Guadalupe Counties pursuant to NMSA Section 40-12-5.1

According to the statute, a judicial district may create a Safe Exchange & Supervised Visitation program by local court rule approved by the Supreme Court. "The program shall be used when, in the opinion of the court, the best interests of the child are served if confrontation or contact between the parents is to be avoided during exchanges of custody or if contact between a parent and a child should be supervised." The District Court may employ one or more contractors for Safe Exchange & Supervised Visitation services by a person (1) with whom a child may be left by one parent for a short period while waiting to be picked up by the other parent; or (2) to supervise visits among one or both parents and the child.

### **Letters of Interest**

Letters of interest must contain all information requested and must be received by **Wednesday, October 5, 2022 at 1:00 PM**. Submissions received after this time will not be considered. A list of qualifications and specific duties is included in this Request.

### **Please address any questions about this Request to:**

Kristen Frueh Leyba, Statewide Program Manager  
Administrative Office of the Courts  
Phone: (505) 470-9505  
Email: [aockrf@nmcourts.gov](mailto:aockrf@nmcourts.gov)

**A. Scope of Work:**

**The Offeror shall perform the following services:**

1. Provide safe exchanges and supervised visits in domestic matters, domestic violence, and other appropriate cases referred by the Court;
2. Maintain strong working relationships with the Court; meet on a quarterly basis, or more frequent if needed.
3. Provide intakes for each parent and orientation for the child(ren) to determine the family's needs and resources. This activity includes explaining program procedures and expectations, and obtaining the parents' agreement to participate and comply with program rules;
4. Provide supervised visits between the parent and child(ren), as directed by the Court. Visits shall be conducted under the supervision of fully trained and qualified staff in a location provided by the Offeror. Supervised visitation may include, but is not limited to group or individual visits which are observed at all times, parent coaching, and therapeutic supervision with a licensed counselor as directed by the Court and/or funding availability. The extent to which therapeutic visits will be provided shall be determined during negotiations with the finalist Offeror(s);
5. Provide safe exchanges in a neutral location for parents to drop off and pick up their child(ren) for visitation. Offeror(s) shall provide the location for the safe exchanges;
6. Provide services in the language used by participating clients, including sign language;
7. Provide SESV services during weekday, evening and weekend hours as needed to assist the Court and accommodate the schedules of parents and children. The number of hours per week of program services shall be determined during negotiations with the finalist Offeror(s);
8. Report to the Court on observations made during visits and exchanges, participation by the child(ren) and parents, payment of fees, and compliance with the Court's order for services; determine when reports will be submitted and to whom;
9. Promote the program with the referring Courts and attorneys representing parents and children. This activity includes providing a description of successes and innovations quarterly to the AOC for performance measure reporting;

10. Refer parents to community resources to address their other needs, as appropriate;
11. Submit to the Court and the AOC a final budget for the months of October 15, 2022 through June, 30, 2023, including funding received through this Agreement, estimated parent fees to be collected in that same period of time, and other potential resources; attachment C
12. Utilize the Supreme Court approved sliding fee scale as defined in Order 18-8500-001 in accordance with Subsection C of Section 40-12-5.1 (NMSA 1978 as amended) to make parent fee determinations and file the determination with ordering court; attachment B
13. Collect and process parent fees per the *Safe Exchange & Supervised Visitation Parent Fee Standard Operating Procedures for Providers*, per Order 18-8500-012.
14. A potential Offeror must be able to account for all parent fee revenues received and expended *separately* from the funds provided under this Agreement and any other funding received by the service provider. Unexpended fee revenues shall be remitted to the 4th Judicial District Court in accordance with the Court's procedures by July 31, 2023, as required by law;
15. Achieve and maintain the *New Mexico Court Standards for Safe Exchange & Supervised Visitation (Court Standards)*. This activity may require revision of program rules, policies, and procedures to address new requirements or amendments to the *Court Standards*. Work with the evaluator on *SESV Best Practices*, assessments, and any work plans created;
16. Provide evidence to the AOC that each person prior to providing direct services has successfully completed or will successfully complete a national criminal background check and child abuse and neglect screen conducted by the New Mexico Children, Youth and Families Department (CYFD), in accordance with the *Court Standards*. (A packet regarding the CYFD Background Check information can be found on the following page: [https://sesv.nmcourts.gov/wp-content/uploads/sites/35/2020/12/Facility\\_Center\\_Packet.pdf](https://sesv.nmcourts.gov/wp-content/uploads/sites/35/2020/12/Facility_Center_Packet.pdf)). The Offeror shall submit or agree to submit a copy of CYFD's letter of approval for each individual successfully completing the background checks and providing direct services;
17. Ensure that staff is appropriately trained to maintain confidentiality and neutrality in handling individual clients and case files, and to keep client and case file information separate from any other program files and information. A potential Offeror shall demonstrate the process used to ensure that no conflicts of interest exist between staff and clients;
18. Submit to the AOC the Staff Credentials Form quarterly listing the staff

members with their position title that will be providing direct services showing the additional hours of training obtained by each individual during FY 2023 and topics of training/coursework, to meet the *Court Standards* requirements;

19. Develop and maintain written program rules, policies, and procedures, promptly submitting updates to the AOC, as changes occur;
20. Submit accurate monthly data reports to the SESV automated database system no later than the fifth calendar day of the month following the end of the month in which services were delivered;
21. Develop a plan and timeline needed to achieve a **monthly** performance target of **16 hours** of exchange and visitation **services** during the period beginning October 15, 2022 through July 31, 2023. The number of hours of program services shall be determined during negotiations with the finalist Offeror(s). Information about the number of service hours currently being provided in a particular service area is available from the Procurement Manager;
22. Submit accurate reports as required in this Agreement or otherwise requested by the Court or the AOC;
23. Participate in required AOC-sponsored trainings/meetings, site visits, program evaluations, and audits of the SESV program, and meet any requirements or requests of the Court or the AOC, or others designated by the Court or the AOC resulting from these visits, evaluations, and audits; and
24. Maintain and provide complete access to detailed records documenting services provided, fee revenues collected, and expenses incurred, as required by the AOC, and permit the Court, the AOC, and their designees to inspect the place of business for services.

**B. Business Specifications:**

**1. Program Time Frame**

The contract becomes effective on October 15, 2022, or as otherwise negotiated in the contract, and services must be available for parties in the proposed counties in the 4th Judicial District for cases referred by the Court beginning on that date through the close of business on June 30, 2023. Offeror(s) shall submit a detailed plan and timeline demonstrating their ability to commence services on October 15, 2023, or as soon thereafter as possible, including the human resources, financial, and automated systems capacity necessary to perform the Scope of Work set forth in section A.

**2. Facilities**

Offerors shall provide a detailed narrative description of the available facility(ies), which shall include a safety plan and precautions available beginning October 15,

2023. The Offeror shall develop the program's safety plan in coordination with local law enforcement, pursuant to the *Court Standards*. Copies of the safety plan shall be submitted to the Court and the AOC.

Offerors shall also provide a description of the toys, equipment and play spaces for children and their parents, office space, computers and equipment to perform the day-to-day administrative processes required to operate the program.

Offerors shall provide evidence of general liability insurance, no less than \$1 million, covering injury to any program participant or third party for injuries arising out of actions of program staff.

### 3. Interaction with the AOC and the Court

The AOC will assign a staff person, the Statewide Program Manager, to work with the Offeror(s) and the 4th Judicial District Court to manage the contract, its requirements and deliverables, including overseeing the timeliness of the responses of the potential contractor(s) regarding insurance renewals, staff qualifications and training requirements, reports and data submission, and related activities detailed in the contract. Such management and oversight by the AOC, however, does not relieve the Offeror(s) of the primary responsibility for complying with deliverables and meeting deadlines in the contract, or other requirements as requested by the Court and the AOC. Please describe the Offeror's plan for interaction with the AOC and the Court.

## C. Contractor Requirements

### 1. Project Plan

As part of the proposal, Offerors must submit a narrative project plan that addresses the following items, and shows the total number of services to be provided in the county proposed for services:

- Number of safe exchanges by month for Fiscal Year (FY) 2023, the period from October 15, 2022 through June, 30, 2023
- Number of supervised visits by month for FY 2023, the period from October 15, 2022 through June, 30, 2023
- Number of service hours for safe exchanges by month for FY 2023, the period from October 15, 2022 through June, 30, 2023
- Number of service hours for supervised/therapeutic visits, if any, by month for FY 2023, the period from October 15, 2022 through June, 30, 2023
- Number of children, parents and other family members for which the program will provide safe exchanges by month for FY 2023, the period from October 15, 2022 through June, 30, 2023
- Number of children, parents and family members for which the program will provide supervised/therapeutic visits, if any, by month for FY 2023, the period from October 15, 2022 through June, 30, 2023.

**If starting a new program**, the proposal must also address amount of time it will take to plan, coordinate, implement, and administer a program of Safe Exchange & Supervised Visitation services, and include a detailed timeline of start-up activities. In addition, Offerors must identify any potential barriers to planning, coordinating, implementing, and administering these services, and explain their strategies for successfully overcoming these barriers.

2. Offeror Experience

Offerors must submit a detailed narrative statement of relevant experience, including professional qualifications, specific training as stated in the *Court Standards* and Attachment D, and other experience for each professional and support person proposed to work under the contract. For a copy of the *Court Standards*, please see <https://sesv.nmcourts.gov/standards/>. Attachment D lists suggested training topics for various positions in the SESV program. The documentation must thoroughly describe how the Offeror has supplied expertise for similar contracts and related work in planning, coordinating, implementing, and administering Safe Exchange & Supervised Visitation services, and include a description of the Offeror's experience with other Court programs such as domestic relations mediation services and parent coordinator programs. Also, please describe any relationship(s) already established with the Court. In addition, letters of reference from parties familiar with Offeror's related experience in the past *two* years shall be submitted with the letter of interest.

3. Project Reporting

Offerors must agree to prepare detailed written status reports for submission to the AOC Statewide Program Manager which may include statements of time spent on the project and descriptions of work performed at the request of the Court and/or the AOC. Written status reports will include at a minimum project progress, problems encountered with recommended solutions, and requested project plan adjustments. A statement of progress and problems is required at least once each year at the mid-point.

4. Proposed Budget

Using the data prepared for the response Paragraph #1 above, Offerors shall prepare Budget Form 1 in Attachment C to describe the proposed client population, the number of services, and the number of service hours by type of service to be provided each month for FY 2023, beginning October 15, 2022 through June, 30, 2023. Please count exchanges and supervised visits separately. Offerors shall also complete Budget Forms 2 and 3 contained in this RFI. **Information about current service levels and parent fees may be obtained by contacting the AOC Procurement Manager**, as needed. A detailed narrative should be used to justify all program costs by the categories of expense listed on Budget Form 2.

Offerors who have not previously provided Safe Exchange & Supervised Visitation services must show the anticipated start-up costs of establishing a Safe Exchange

& Supervised Visitation program, as well as ongoing operating costs for FY 2023, the period from October 15, 2022 through June, 30, 2023.

Offerors shall agree to attend required AOC-sponsored training, program evaluation meetings and other events as requested during FY 2023, the period from October 15, 2022 through June, 30, 2023, and may utilize the contract funding to cover reasonable travel costs to attend if in person attendance is required.

Offerors shall comply with all contracting and billing procedures of the AOC and State of New Mexico, including the submission of an accurate monthly summary of performance with each invoice. Offerors shall agree to submit monthly invoices to the AOC between the first and fifteenth day of the month following the month in which services were provided. However, the final invoice on this Agreement for services delivered in FY 2023 must be submitted to the AOC *no later than July 8, 2023*. An invoice received after that date may not be paid. Payments shall be made by the AOC to the successful Offeror(s) within thirty days upon receipt of an accurate and complete invoice.

**Compensation**

For Fiscal Year 2023 (October 15, 2022 to June, 30, 2023), compensation shall not exceed \$16,000.00 inclusive of gross receipts tax and travel and incidental costs. The AOC reserves the option of renewing the initial contract on an annual basis.

**Safe Exchange and Supervised Visitation  
Letter of Interest for Service Provider**

**Please submit your letter of interest via email to:**

Kristen Frueh Leyba, Statewide Program Manager  
Administrative Office of the Courts  
Phone: (505) 470-9505  
Email: aockrf@nmcourts.gov

Name: \_\_\_\_\_

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

Phone(s): \_\_\_\_\_

Email: \_\_\_\_\_

**THE FOLLOWING MUST BE INCLUDED:** *(attach additional pages, as needed)*

1. **Staff Experience and Qualifications.** Offerors must demonstrate that the appropriate human resources are either currently on staff or will be hired reasonably quickly in order to implement the program and begin delivering services on October 15, 2022. Offerors shall submit current resumés and background checks for all persons expected to provide services under the contract. Experience narratives shall also be attached and describe the specific experience of the various staff persons in relation to the role that person will perform under the contract. Narratives must include the name of the individual(s) proposed, and should include a thorough description of the education, knowledge, and relevant experience in the area of supervised visits and exchanges or closely related field, as well as any certifications or other professional credentials clearly showing the person’s expertise. Offerors who have not previously provided Safe Exchange & Supervised Visitation services must state specifically that all staff providing direct services have received the approval of or will undergo the national criminal background check and child abuse and neglect screening conducted by the New Mexico Children, Youth and Families Department (CYFD), as directed by the AOC, and until that process has been completed successfully, such staff will not have unsupervised access to children. If possible, copies of the CYFD letters stating that each candidate has been approved and successfully completed the clearance shall be submitted with the letter of interest or provided to the AOC immediately upon Offeror’s receipt of such letters.
2. **Campaign Contribution Disclosure** By October 15, 2022, a potential Offeror must submit with his/her response to this proposal the “Campaign Contribution Disclosure Form” that accompanies this document. (See Attachment A)
3. **Liability Insurance.** Submit evidence of the organization or individual’s current general liability insurance policy of at least \$1 million. If the organization or



individual does not yet have such insurance, describe the steps taken to obtain such insurance by October 15, 2022, and provide any assurances received from insurance carriers;

4. **Standards of Practice.** Summarize the Offeror's familiarity with the *New Mexico Court Standards for Safe Exchange & Supervised Visitation*, or any successor standards adopted by AOC, and processes the program uses or will use to achieve and maintain compliance with the *Court Standards*. If the program is in compliance, please demonstrate. If the program is not yet in compliance, describe the steps to be taken to achieve compliance by October 15, 2022, and maintain compliance thereafter;
5. **Program Rules, Policies, and Procedures.** Summarize and attach a copy of the program's rules, policies, and procedures for Safe Exchange & Supervised Visitation services. The rules, policies, and procedures must include the program's confidentiality understandings with participants. If rules, policies, and procedures have not been developed, please provide a list of the topics to be covered in rules, policies, and procedures, and the process and timeline by which they will be developed and implemented. Address procedures for enforcing the rules, policies and procedures;
6. **Response to Specifications** including all items listed in the Business Specifications and Contract Requirements in Sections B and C of this RFI and Budget Forms 1, 2 and 3.
7. **Professional References for the Organization or Individual**  
Offerors must provide contact information and recent letters of reference from professionals practicing in related fields who can attest to the organization's or individual's ability to meet the contract specifications and program requirements. Such letters shall be based on professional relationships during the previous two years.

## **ATTACHMENT A**

### **CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

Pursuant to the Procurement Code, Sections 13-1-28, et seq., NMSA 1978 and NMSA 1978, § 13-1-191.1 (2006), as amended by Laws of 2007, Chapter 234, any prospective contractor seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body may cancel a solicitation or proposed award for a proposed contract pursuant to Section 13-1-181 NMSA 1978 or a contract that is executed may be ratified or terminated pursuant to Section 13-1-182 NMSA 1978 of the Procurement Code if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

**THIS FORM MUST BE INCLUDED IN THE REQUEST FOR PROPOSALS AND MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.**

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official’s behalf for the purpose of electing the official to statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

**“Family member”** means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor.

**“Pendency of the procurement process”** means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

**“Prospective contractor”** means a person or business that is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person or business qualifies for a sole source or a small purchase contract.

**“Representative of a prospective contractor”** means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

Name(s) of Applicable Public Official(s) if any: \_\_\_\_\_  
(Completed by State Agency or Local Public Body)

**DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:**

Contribution Made By: \_\_\_\_\_

Relation to Prospective Contractor: \_\_\_\_\_

Date Contribution(s) Made: \_\_\_\_\_

\_\_\_\_\_

Amount(s) of Contribution(s) \_\_\_\_\_

\_\_\_\_\_

Nature of Contribution(s) \_\_\_\_\_

\_\_\_\_\_

Purpose of Contribution(s) \_\_\_\_\_

\_\_\_\_\_

(Attach extra pages if necessary)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

— OR —

**NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE to an applicable public official by me, a family member or representative.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (Position)

## Fourth Judicial District Safe Exchange & Supervised Visitation

**New Mexico Domestic Relations  
Sliding Fee Scale**

Income of Party	Percentage of Full Fee Paid
0-\$14,472	10%
\$14,473-18,090	20%
\$18,091-24,120	30%
\$24,121-36,180	40%
\$36,181-42,210	50%
\$42,211-48,240	60%
\$48,241-60,300	80%
Above \$60,300	100%

**APPROVE RATES**

Full Rate per hour for visits \$60.00  
 Full rate per exchange \$30.00  
 Full rate per intake per party \$100.00

Income of Party	Cost/hr visits (full rate = \$XX/hr)	Cost/ exchange (full rate = \$XX/exch)	\$XX intake fee/party
0-\$14,472	\$6.00	\$3.00	\$10.00
\$14,473-18,090	\$12.00	\$6.00	\$20.00
\$18,091-24,120	\$18.00	\$9.00	\$30.00
\$24,121-36,180	\$24.00	\$12.00	\$40.00
\$36,181-42,210	\$30.00	\$15.00	\$50.00
\$42,211-48,240	\$36.00	\$18.00	\$60.00
\$48,241-60,300	\$48.00	\$24.00	\$80.00
Above \$60,300	\$60.00	\$30.00	\$100.00

Notes:

1) For families greater than four (4) an additional 10% discount will be applied, except that no party will pay less than 10% of the fee without approval of the Judge.

Effective July 1, 2018, in accordance with NM Supreme Court Order 18-8500-012

NM Sliding Fee Scale for ADR & SESV is to be update every five (5) years, based upon that current year's Federal Poverty Level.

**ATTACHMENT C**  
**BUDGET FORMS 1, 2, & 3**

**BUDGET FORM 1 – PROGRAM NARRATIVE**  
*PLEASE INSERT PROGRAM NAME*

**Proposed FY 2023 Program Budget – October 15, 2022 through June 30, 2023**

The budget narrative must contain the following components:

1. Describe the client population proposed to be served by the SESV program.
  - What geographic area, county or counties will the program serve?
  - How many clients will the program serve during the period from October 15, 2022, through June 30, 2023? Please count children and adults *separately*. Please show the projected number of clients by month and type of service activity, i.e. exchanges and supervised/therapeutic visits. Please explain the basis of these projections – e.g., the operating experience of an existing program or a projection based on a needs assessment and the sources of the information for the needs assessment. Please count a client only once during the year.
2. Describe the Safe Exchange & Supervised Visitation services to be provided.
  - Please explain which services – i.e. exchanges and supervised/therapeutic visits – will be provided on which days and times during a normal week. Please list the facility or facilities' proposed daytime, evening and weekend hours.
  - Please provide the number of safe exchanges and number of supervised/therapeutic visits by month for the period beginning October 15, 2022, through June 30, 2023. Please count exchanges and supervised/therapeutic visits *separately*.
  - Please show the number of *service hours* that will be provided by type of service by month for the period beginning October 15, 2022, through June 30, 2023? Please count exchanges and supervised/therapeutic visits *separately*. Service hours should be counted by the *actual* time it takes to conduct the service, but *not* the time spent writing reports, making appointments, etc.
  - Please show the total cost to provide the proposed number of services and service hours for exchanges and supervised/therapeutic visits.
3. Describe the parent fees to be collected.
  - Please show the amount of parent fees the Offeror anticipates collecting from the parents projected under #1 above for Safe Exchanges, Supervised/Therapeutic Visits.
  - Please describe the Offeror's consultation with the Court regarding the proposed fees and rates for services applied to the Supreme Court sliding fee scale according to Supreme Court Order 18-8500-001, Attachment B.
  - Please show the proposed expenditure of parent fees collected by budget category as listed on Budget Form 2 and provide a narrative justification for each category of expense.
4. Describe other potential revenue resources for the program.
  - What other resources does the Offeror expect to use for the program? Such resources may include local, State or Federal grants, foundation money and fundraising efforts, among others.

**BUDGET FORM 2 – PROGRAM OPERATING BUDGET**

*PLEASE INSERT PROGRAM NAME*

FY 2023 - October 15, 2022, through June 30, 2023

Please provide a proposed budget to operate the SESV program in the county or counties proposed for services. Attach *additional* pages with a detailed narrative justifying the amount proposed for each category of expense in the budget. The narrative may also be used to describe the Offeror’s consultation with the Court regarding parent fees for services.

<b>Category of Expense</b>	<b>AOC Contract</b>	<b>Parent Fees</b>	<b>Other Income</b>	<b>Total</b>
<b>Salaries</b>	\$	\$	\$	\$
<b>Benefits</b>				
<b>Travel costs</b>				
<b>Insurance</b>				
<b>Security</b>				
<b>Supplies</b>				
<b>Rent</b>				
<b>Utilities</b>				
<b>Professional Services</b> (itemize by type)				
<b>Telephone, Internet, and Related Services</b>				
<b>Training</b>				
<b>Subscriptions/Dues</b>				
<b>Furniture and Equipment</b> (provide details for major items)				
<b>Other</b> (please list)				
<b>Total 3-Month Program Budget</b>	\$	\$	\$	\$

**BUDGET FORM 3 – PROJECTED REVENUE SOURCES \***

FY 2023 – October 15, 2022, through June 30, 2023

Please provide additional detail regarding the Offeror’s proposed revenue sources, *other* than the funding from the AOC.

- 1. Proposed parent fees to be collected for services as defined on the sliding fee Scale \$ \_\_\_\_\_
- 2. Local government grants or contributions \$ \_\_\_\_\_
- 3. Federal/State government funding, including Medicaid, Safe Haven, CASA, etc. \$ \_\_\_\_\_
- 4. Foundation or other charitable sources \$ \_\_\_\_\_
- 6. Offeror’s own fundraising efforts \$ \_\_\_\_\_
- 4. Other non-AOC sources (please name) \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_
- \* \* \* \* \*
- 8. TOTAL non-AOC revenue (add lines 1-7) \$ \_\_\_\_\_
- 9. Total funding requested from the AOC (from Budget Form 2) \$ \_\_\_\_\_
- 10. Total revenue needed to operate program (add “8” and “9” together) \$ \_\_\_\_\_

NOTE: The total revenue needed to operate program shown on Line 10 of Budget Form 3 should equal the proposed total 3-month program costs shown on Budget Form 2.

---

\* Please provide *additional* pages, as needed, to ensure a *complete* picture of the program’s financial status and needs. Please note whether any of the funding sources listed above will cease during FY 2023, and if so, please provide the date.



## ATTACHMENT D

### **SAFE EXCHANGE & SUPERVISED VISITATION SUGGESTED QUALIFICATIONS AND TRAINING**

#### **1. Training for Visit Supervisors:**

- a. Direct observation of parent/child contact performed by a trained visit supervisor (shadowing);
- b. Co-supervision of the visit by the trainee with a trained visit supervisor; and
- c. Direct observation by a trained visit supervisor while the trainee independently supervises the visit (reverse shadowing); and
- d. New or geographically isolated trainees may substitute the use of a video of parent/child contact and telephone consultation from a trained visit supervisor for shadowing and reverse shadowing. Once there is a trained visit supervisor on site, the requirement of Section must be followed.
- e. Any person who provides direct service to a client or who does clinical supervision of a person providing direct service must complete 24 hours of training covering at least:
  - (1) *New Mexico Court Standards for Safe Exchange & Supervised Visitation*;
  - (2) Provider rules, policies and procedures;
  - (3) Safety for all participants;
  - (4) Mandatory child abuse reporting;
  - (5) Professional boundaries, conflict of interest, confidentiality, and maintaining neutrality;
  - (6) Basic stages of child development;
  - (7) Effects of separation and divorce on children and families;
  - (8) Grief and loss associated with parental separation and removal from the home due to child abuse and neglect;
  - (9) Cultural sensitivity and diversity;
  - (10) Family violence, including domestic violence and the effects of domestic violence on children;
  - (11) Child abuse and neglect, including child sexual abuse;
  - (12) Substance abuse;
  - (13) Provision of service to parents and children with mental health and developmental issues or other physical or emotional impairment;
  - (14) Parent introduction/re-introduction;
  - (15) Parenting skills;
  - (16) Assertiveness training and conflict resolution;
  - (17) How and when to intervene during supervised visits and safe exchanges to maintain the safety of all participants;
  - (18) Observation of parent/child interactions;
  - (19) Preparation of factual observation notes and reports; and
  - (20) Relevant laws regarding child custody and visitation and child protection.

#### **2. Training for Safe Exchange Monitors:**

A person providing *only* safe exchange services may meet these requirements by completing 16 hours of training to include the following:

- a. *New Mexico Court Standards for Safe Exchange & Supervised Visitation*;
- b. Provider rules, policies and procedures; Safety for all participants;
- c. Mandatory child abuse reporting;

- d. Professional boundaries, conflict of interest, confidentiality, and maintenance of neutrality;
- e. Effects of separation and divorce on children and families;
- f. Family violence, including domestic violence and the effects of domestic violence on children;
- g. Cultural sensitivity and diversity;
- h. Child abuse, including child sexual abuse and neglect;
- i. Substance abuse;
- j. Provision of service to parents and children with mental health and developmental issues or other physical or emotional impairment;
- k. Parent introduction/reintroduction;
- l. Assertiveness training and conflict resolution;
- m. How and when to intervene during safe exchanges to protect and maintain the safety of all participants; and
- n. Relevant laws regarding child custody and visitation and child protection.

### **3. Training for Provider Management**

Any person who is responsible for management of a program of Safe Exchange & Supervised Visitation services, in addition to the requirements set forth above, must complete an additional 16 hours of training covering at least the following topics:

- a. Receiving referrals;
- b. Conducting intake and orientation, including preparing children;
- c. Record keeping and confidentiality;
- d. Establishing a visitation contract with clients;
- e. Setting fees;
- f. Setting conditions (rules) for receiving services;
- g. Setting up the physical space or location for safe visits/exchanges;
- h. Collaborating with the Court and the AOC;
- i. Referring clients to other services;
- j. Training and supervising staff, including volunteers and interns;
- k. Reporting to the Court and the AOC, including updating the Safe Exchange & Supervised Visitation automated database at required deadlines and as needed;
- l. Testifying in Court;
- m. Suspending and terminating services; and
- n. Managing and reviewing cases.