

# Bidders Conference 2025



U.S. Probation  
& Pretrial Services Office  
Eastern District of Wisconsin  
April 15, 2025

# Welcome!

- **Michael Klug**, Chief U.S. Probation Officer
- **Jessica Hoene**, Deputy Chief U.S. Probation Officer
- **Megan Cleveland**, Drug & Alcohol Treatment Specialist/USPO
- **LeKeasha K. Mallett**, Mental Health Treatment Specialist/USPO
- **Patty Savasta & Jennifer Rufenacht**, Sex Offender Treatment Specialist/USPO

# Conference Goals

- At the end of this presentation, potential vendors will be able to:
  - Understand the overall procurement process.
  - Submit a “technically acceptable” proposal.
  - Understand vendor requirements under each agreement.
  - Understand what to expect from probation officers.



# Agenda

## **As a large group**

- Review the overall procurement process
- Review Staff Requirements and Facility Requirements
- Pass/Fail Criteria - How to submit a “Technically Acceptable” proposal
- What to expect from the Probation Office
- Review the types of services we are currently soliciting for in each catchment area

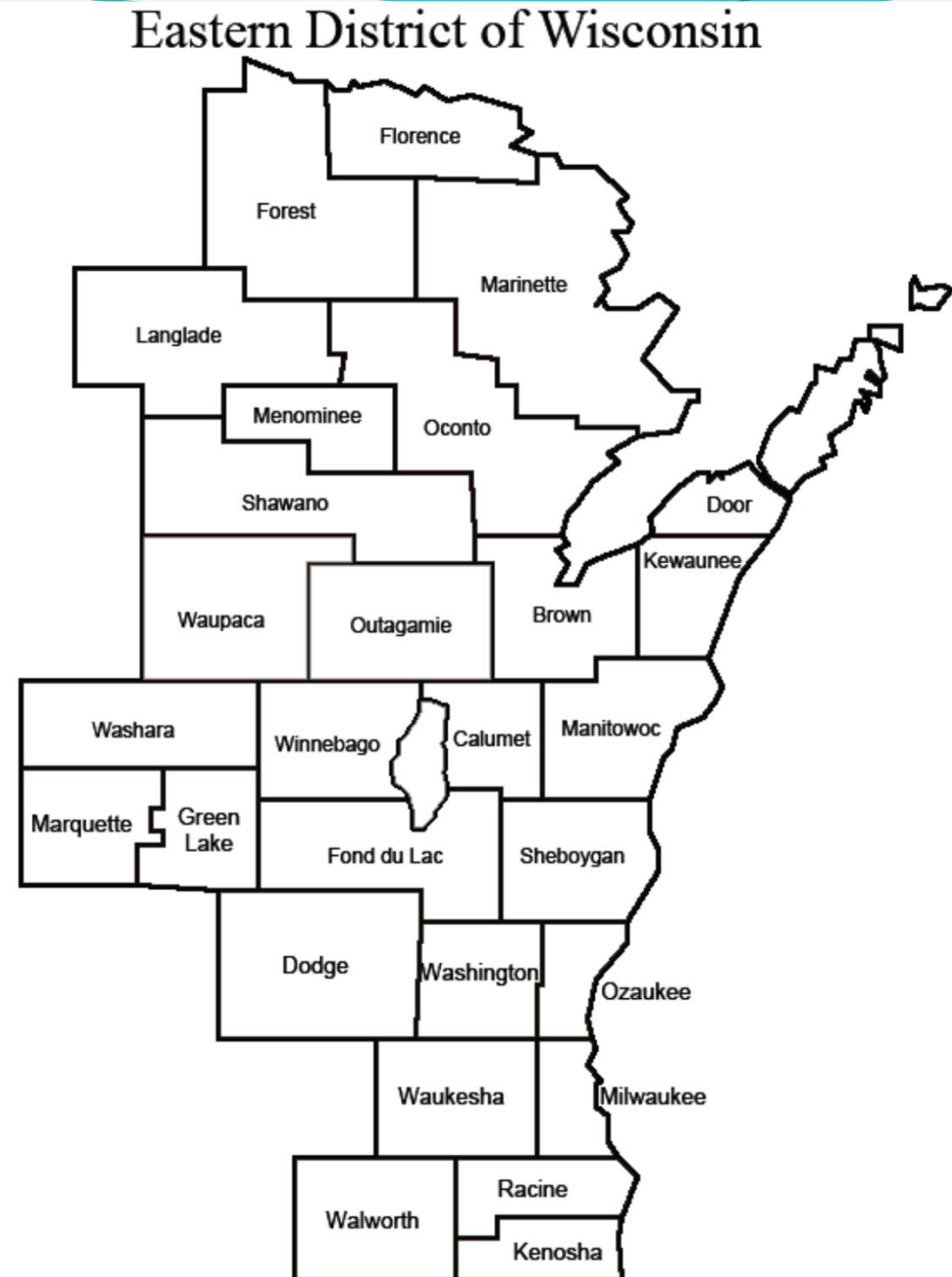
## **As a small group**

- Review specific services for each type of treatment with the individual specialist (AODA, MH, or SOT) and answer further questions

# Who We Are

## United States Probation Office in the Eastern District of Wisconsin

- Covers the eastern one-third of the state
- Main office located in Milwaukee
- Satellite office located in Green Bay



# Who We Are

- **Our Mission**

- To assist the federal courts in the fair administration of justice.
- To protect the community.
- To bring about long-term positive change in individuals under supervision.

- **What We Do**

- U.S. Probation and Pretrial Services Officers, considered the "eyes and ears" of the federal courts by investigating and supervising persons charged with or convicted of federal crimes.
- Officers gather and verify information about persons who come before the courts.
- Prepare reports that the courts rely on to make release and sentencing decisions.
- Supervise persons released to the community by the courts and paroling authorities.
- **Assist persons under supervision to services to help them maintain pro-social lives through substance abuse treatment, mental health treatment, medical care, training, and employment assistance.**

# Definitions

- **Request for Proposal (RFP)** –
  - The solicitation document which contains the full text of all applicable government regulations and requirements for the agreement.
- **Blanket Purchase Agreements (BPAs)** –
  - A “charge account” arrangement between a buyer (U.S. Probation Office) and a seller (provider/vendor of services) for recurring purchases of services.
  - Differs from contracts in that they do not obligate the federal government in any way.
  - Valid for a specific period of time, not to extend beyond the fiscal year, e.g., October 1, 2025 to September 30, 2026.
- **Catchment Area** – the geographic area in which the vendor must provide services.
- **Project Codes** – a unique, 4-digit number assigned to each service.
  - (ex., 1010 – UA collection and reporting; 2010 – individual substance abuse treatment)

# Definitions (cont.)

- **Estimated Monthly Quantities (EMQs)** – the total monthly quantities to be ordered per service item under the BPA. EMQs are only estimates and do not bind the government to meet those estimates.
- **Local Needs or Local Services** – Requirements NOT listed in the Statement of Work to address unique needs of the district.
- **“Technically Acceptable”** – To be acceptable for evaluation, proposals must be submitted timely and prepared in accordance with Sections B and L of the RFP.
  - Pass/Fail Criteria – See Section M for a copy of the Pass/Fail Checklist.
  - Proposals with exceptions will be deemed technically unacceptable.
- **Program Plans (Probation Form 45)** – The referral document, which reflects the services and frequency the vendor is expected to provide



# Types of Agreements

- **Non-competitive purchase order (NCPO)**
  - Used when the estimated total cost of services is \$10,000.00 or less for the fiscal year.
  - Competition and advertising are not required.
  - Used for 12-months.
- **Competitive purchase order (CPO)**
  - Used when the estimated total cost of services is between \$10,001.00 and \$25,000.00.
  - Advertising not required, but 3 quotes should be sought.
  - Awarded to one provider - technically acceptable, lowest price.
  - Used for 12-months.
- **Blanket Purchase Agreement (BPA)**
  - Used when costs are estimated to exceed \$25,000.00 and/or when multiple vendors are needed.
  - Used for 12-months with four, 12-month options (5 years total).
  - Competition and advertising needed.
  - Awarded to technically acceptable, lowest price.

# Procurement Process and Timeline (BPAs and CPOs)

- **Solicitation**
  - Advertise for services (May 2025)
  - Request proposals (posted July 2025)
  - Ends approximately one month after posting (August 2025)
- **Evaluation** (August/September 2025)
  - Technical acceptability
  - Lowest price
  - On-site visit
  - Responsibility Determination
    - Review list of parties excluded from federal procurement
    - Conduct reference checks
  - Ends September 30, 2025
- **Award** (begins 10/1/25)
  - Once evaluation is complete, the contracting officer will make the award with services to commence on October 1, 2025.
  - Unsuccessful offers will receive a letter and be notified of the total evaluated price of the successful offer (not the unit pricing of the successful offer).

# Post-Award Information

- **Maintenance** – will be covered in a post-award meeting with the successful offeror.
  - Referrals
  - Invoices
    - Due by the 10<sup>th</sup> of each month
    - Two-page invoice and monthly treatment report that verifies dates of attendance and includes signatures/initials of person under supervision and counselor/staff member
  - Monitoring
    - For BPAs and CPOs
    - To occur annually (approximately February)
- **Renewal** – will be covered in a post-award meeting with the successful offeror.

# Sample RFP

- Section A
  - AO367 – Solicitation/Offer/Acceptance (Boxes 11 – 15)
- Section B
  - Required Services being solicited
  - Offers must bid on all required services
  - An asterisk indicates a service that has been modified under “Local Services.”
  - EMQs and Unit Pricing
    - Vendors must submit an all-encompassing price


# Section C - Statement of Work

- U.S. Probation and Pretrial Services Offices are required to ensure that all vendors adhere to the specifications of the Statement of Work, Section C.
- Mandatory requirements are outlined for each project code
  - For example: Individual counseling requires monthly treatment reports to PO, notification of noncompliant client behavior, and transitional care summaries when a client ends treatment, etc.
  - Staff requirements and facility requirements
  - File maintenance requirements
- Please **READ** the Statement of Work, you will find the answers to the vast majority of questions are within that document.

# Where to find the solicitation?

← ↻ 🏠 <https://www.wiep.uscourts.gov/vendors/index.html> ⓘ ☆

Wisconsin Circuit C... About Toxicology ~... :: Milwaukee County... Wisconsin Recovery... Wisconsin Commun... CRL Oasis You Are Accountable Dose of Reality: Saf... 211 Wisconsin DOC Offender Search >

 **U.S. PROBATION AND PRETRIAL SERVICES**  
**Eastern District of Wisconsin**  
Michael Klug: Chief Probation Officer  
Jessica Hoene: Deputy Chief Probation Officer

"Together, Making a Difference"

About Community Resources Education Employment Health Care Housing Mental Health

Home  
Online Reporting  
Bureau of Prisons  
Career Opportunities  
Contact Info  
Court Payments  
Court Websites  
EEO/EDR Policy  
Forms  
Success Stories  
**Vendor Information**  
Surveys

**Vendors**

**Solicitation Provisions Incorporated by Reference**  
This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the contracting officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this address:  
<http://www.uscourts.gov/procurement.aspx>.

**FY2025 Solicitations**

**Active**

- None

**Milwaukee Office**  
517 E. Wisconsin Ave.  
Milwaukee, WI 53202  
Phone: (414) 297-1425

[Return to Top of page](#)  
Fax: (414) 297-1989  
Tollfree: (888) 289-8386  
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**Green Bay Office**  
125 S. Jefferson St., Rm.301  
Green Bay, WI 54301  
Phone: (920) 884-7780

[www.wiep.uscourts.gov](https://www.wiep.uscourts.gov)



# Substance Abuse Services

## Milwaukee County

Short-Term Residential Treatment: Men's and Women's (2001)

## District-Wide (Outside of Milwaukee County)

Urine Collection and Reporting (1010)

Breathalyzer Testing (1504)

Individual Substance Abuse Counseling (2010)

Substance Abuse Disorder Intake Assessment and Report (2011)

# Mental Health Services



## Brown, Kenosha, Milwaukee, Racine, and Waukesha Counties

Psychological Evaluation and Report (5010)

Mental Health Assessment and Report (5011)

Psychiatric Evaluation and Report (5030)

Individual Mental Health Counseling (6010)

Psychotropic Medication (6040)

Medication Monitoring (6051)



# Sex Offense Specific Services

## District-Wide

Sex Offender Specific Evaluation and Report (5012)

Polygraph Examination (5022)

Maintenance/Monitoring Test (5023)

Individual Counseling/Sex Offender (6012)

Group Counseling/Sex Offender (6022)

Sex Offender Specific Services/Chaperone Training (6091)

Individual Specialized Treatment (7013)

Group Specialized Treatment (7023)

# Other Services

- **1501 Defendant/Offender Reimbursement and Co-Payment:**  
Collect any co-payment authorized on the Program Plan (Probation Form 45) and deduct any collected co-payment from the next invoice to be submitted to the judiciary.

**Additional details regarding each project code can be found in Section C of the Statement of Work (SOW).**

# Local Needs

- What is a local need?
  - Requirements NOT listed in Section C of the Statement of Work but used to further define a specific need with an existing code.
  - Will be marked with an asterisk (\*) in Section B of the RFP (page 3) with specific requirements detailed at the end of Section C.
  - Examples include specific hours of operation, languages offered, etc.

# Quick Check-In

Questions so far?

# Submission of Proposal

- AO367 – Complete Boxes 11-15
- Section B – Submission of Prices
- Section K – Representations, Certifications and Other Statements
  - Complete or check all applicable boxes

# Submission of Proposal

- **Section L – Instructions, Conditions, and Notice to Offerors**
  - Prepare a Certification of Compliance Statement (Attachment A).
  - Prepare a Background Statement (Attachment B).
    - 24 months of monitoring reports (if applicable).
    - Identification of treatment site and any subcontractors.
    - Copies of all applicable business and/or operating licenses as required by state and local laws and regulations.
    - Copies of compliance with all federal, state, and local fire, safety, and health codes.
  - Prepare the Offeror's Staff Qualifications Form (Attachment C)
    - Listing of all staff members who will be working with PUS – name, services performed, education/licensing/relevant experience, if applicable
    - Certifying no proposed staff members are currently under investigation for a criminal offense or are any form of supervision, have not been convicted of a sexual offense, and have the required education, relevant experience, and/or current licenses listed in Section C of the RFP.
  - Prepare Offeror's References (Attachment D)
    - Provide three references (Federal, State, or Local government agencies and/or private organizations)

# Submission of Proposal

- The offeror does not need to submit Sections C, D, E, F, G, H, and I with the response to the RFP.
- Refer to checklist in Section M of the RFP (handout)
  - Section M – Evaluation Factors for Award
  - Includes the Pass/Fail checklist used to evaluate all offers

# Subcontractors

- Services the vendor (prime contractor) proposes to refer to other service providers shall be considered “subcontracting.”
- The prime contractor is responsible to the judiciary for overall performance of the services required under the contract, including:
  - Qualifications of any personnel providing services
  - The possession and maintenance of all appropriate state and local licenses in compliance with all federal, state, and local fire, safety, and health codes.



# Facility Requirements

- Adequate access for persons under supervision with physical disabilities.
- Comply with all applicable local, state, and federal laws and regulations when performing services under this contract.

# Vendor Staff Restrictions (Post-Award)

- Persons under supervision (PUS) cannot perform services or have access to PUS files.
- If a person is charged or under investigation for a criminal offense, cannot perform services or have access to PUS files.
- Persons convicted of a sexual offense cannot perform services or have access to PUS files.
- Persons with restrictions on their license, certifications or practice, cannot perform services or have access to PUS files.

# Vendor Staff Restrictions (Post-Award)

Vendors & Employees Shall:

- Avoid compromising relationships with PUS and USPO/USPSO staff.
- Not employ, contract with, or pay any PUS or PUS' firm or business to do any work for vendor or its employees.
- Report any improprieties to USPO or USPSO.
- Report within 48 hours to USPO/USPSO, any investigations, pending charges, arrests, and/or restriction on licenses or certifications, whether imposed or voluntary, on any staff member.
- Notify USPO or USPSO in writing of any staff changes and provide documentation of any required licensing, certification, experience and education requirements and changes thereof. The Vendor shall submit an Offeror's Staff Qualifications form (Section L – Attachment C) for each new staff member added under this agreement.

# Vendor Expectations

- The intervention and treatment plans must address presenting clinical issues as well as the client's specific criminogenic needs (a.k.a., dynamic risk factors), such as Cognitions, Drugs/Alcohol, Social Networks, and Education/Employment.
- Failure to appear for treatment or drug testing, third-party risk issues, and behavior that violates conditions of supervision must be reported to the probation office within 24 hours.
- Vendors will be working collaboratively with the client's probation officer.
- Vendor's goals/focus should align with officer's/client's goals.

# What can you expect from the probation officer?

- Client's risk assessment results (PCRA/PTRA).
- Referral letters, which identify a client's substance abuse and mental health history, criminal history, and acute risk factors .
- Collateral contacts, including prosocial supports.
- Three-way meetings (vendor, client, PO).
- Ongoing communication about issues/concerns and progress.
- Probation officers will utilize evidence-based interventions that will complement treatment (STARR skills, motivational interviewing).
- Transition from Treatment/Discharge Planning.



Contact Us

**Megan Cleveland**  
**DATS Specialist/USPO**

**Email:**

**[megan\\_cleveland@wiep.uscourts.gov](mailto:megan_cleveland@wiep.uscourts.gov)**

**Phone: (414) 297-1426**

**LeKeasha K. Mallett**  
**MH Specialist/USPO**

**Email:**

**[lekeasha\\_mallett@wiep.uscourts.gov](mailto:lekeasha_mallett@wiep.uscourts.gov)**

**Phone: (414) 297-1960**

**Jennifer Rufenacht**  
**SOT Specialist/USPO**

**Email:**

**[jennifer\\_rufenacht@wiep.uscourts.gov](mailto:jennifer_rufenacht@wiep.uscourts.gov)**

**Phone: (920) 455-7946**

# Questions





# Next Up

- 15-minute break
- Meet in small groups with AODA, MH, or SOT specialist to review requirements for each specialty.