



STATE OF ILLINOIS
CIRCUIT COURT OF COOK COUNTY

Chancery Division Mortgage Foreclosure Mediation Program

PROGRESS REPORT

June 27, 2012

HONORABLE TIMOTHY C. EVANS
CHIEF JUDGE
CIRCUIT COURT OF COOK COUNTY

HONORABLE MOSHE JACOBUS, PRESIDING JUDGE
CHANCERY DIVISION
CIRCUIT COURT OF COOK COUNTY

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EXECUTIVE SUMMARY

This report provides an analysis and evaluation of the current and prospective efficiency, productivity, and financial health of the Mortgage Foreclosure Mediation Program (“Program”). Methods of analysis include trend and ratios of outcomes of mediation, units of service provided for housing counseling, legal aid, and mediation, as well as efficiency of court hearings. Results of the data provided by service providers on the Program show an increase in the rate of successful negotiations with lenders to modify loans and keep homeowners in the home. Additionally, the results show that the rate of servicing continues to increase with each year of the Program, the rate of success of mediation is on par with other programs throughout the country facing a similar rate of foreclosures and that the service providers are improving efficiency from the first year to the second year of the Program with a minimal increase to the budget from the first year to the second year. However, the results also show that the time it takes a case to complete mediation is well above other programs’ completion rates and that efficiency can be improved in the areas of housing counseling and document exchange prior to a mediation session.

Overall, the report finds the prospects of the Program to be positive as more Cook County residents were serviced in the second year of the Program than in the first year. The major areas of strength are the ability to successfully negotiate agreements with lenders on behalf of the homeowner and providing housing counseling and legal aid services to a large part of Cook County homeowners. The major area of weakness remains with the backlogged cases waiting to go to mediation, a product of the huge volume of foreclosures here. The modifications implemented last year helped but were unsuccessful in eliminating this backlog, due in part to insufficient attorney capacity to represent homeowners at mediation sessions combined with difficulty in housing counselors being able to provide an updated and complete income packet to the attorneys at the time of mediation.

Recommendations discussed include:

- Eliminating the backlog in mediation cases by shifting those backlogged cases to four dedicated, trained and vetted housing counselors to provide a single point of contact for the legal aid attorneys, the banks’ attorneys, and the mediators and to help facilitate any document update and exchange that may still need to be completed prior to mediation sessions.
- Improving the quality of housing counseling services with additional training and without losing the wide geographic coverage necessary for Cook County.
- Improving the efficiency of mediation sessions by ensuring that document exchange is completed prior to mediation, that the Court oversees loan modification reviews (and any related document exchange), and refining the issue to be discussed during mediation.
- Improving the efficiency of court hearings by adjusting and refining the use of case managers to oversee and manage cases and the related document exchange.
- Maintaining the same collective budget for professional services as in the second year of the Program.

The analysis in the report is limited by the fact that external factors (such as social, economic, political, legislative, and judicial factors) may impact the volume and efficiency of the Program. Such examples of those factors can include reductions in funding, changes to federal programs (such as HARP, HAMP, and HAFA), new case law that changes how the Court must handle foreclosure cases, or new statutes implemented by the General Assembly that impact services being provided. Additionally, issues such as the robo-signing problems may impact the efficiency and volume of the Program.

PART I GENERAL INFORMATION AND OVERVIEW

The Circuit Court of Cook County Mortgage Foreclosure Mediation Program (“Program”) is a court-annexed program that encourages homeowners in foreclosure to come to court so they can obtain free housing counseling and legal services to help them resolve their foreclosure cases. The Program is the most comprehensive in the nation and provides more services and resources at no cost to homeowners in foreclosure than comparable programs.

To date, nearly 38% percent of homeowners going through the Program have been able to save their homes. This represents a 10% increase in the number of homes saved in the second year of the Program. Another 12% have reached an amicable solution by reaching a dignified exit. All Program participants received assistance in understanding the foreclosure process and their rights throughout the process.

The Program began, in part, on April 12, 2010, with a hotline to schedule appointments with housing counselors and attorneys. Since that time, more than 53,000 housing counseling sessions have been completed, and more than 57,000 people have received free legal advice. Since June 11, 2010, when judges began referring cases to mediation, more than 4,000 households have entered the mediation process. The results are encouraging: one (1) out of every (2) households who enter the mediation phase of the Program reach an agreement with their bank. That agreement could be to save the home through a modification of the loan or it could be an alternative solution to transfer ownership to the bank. Whatever agreement is reached, it must be mutually acceptable to all parties. The current figures for the Program, as of April 30, 2012, are attached with this report at **Appendix A**.

OVERVIEW OF FORECLOSURES

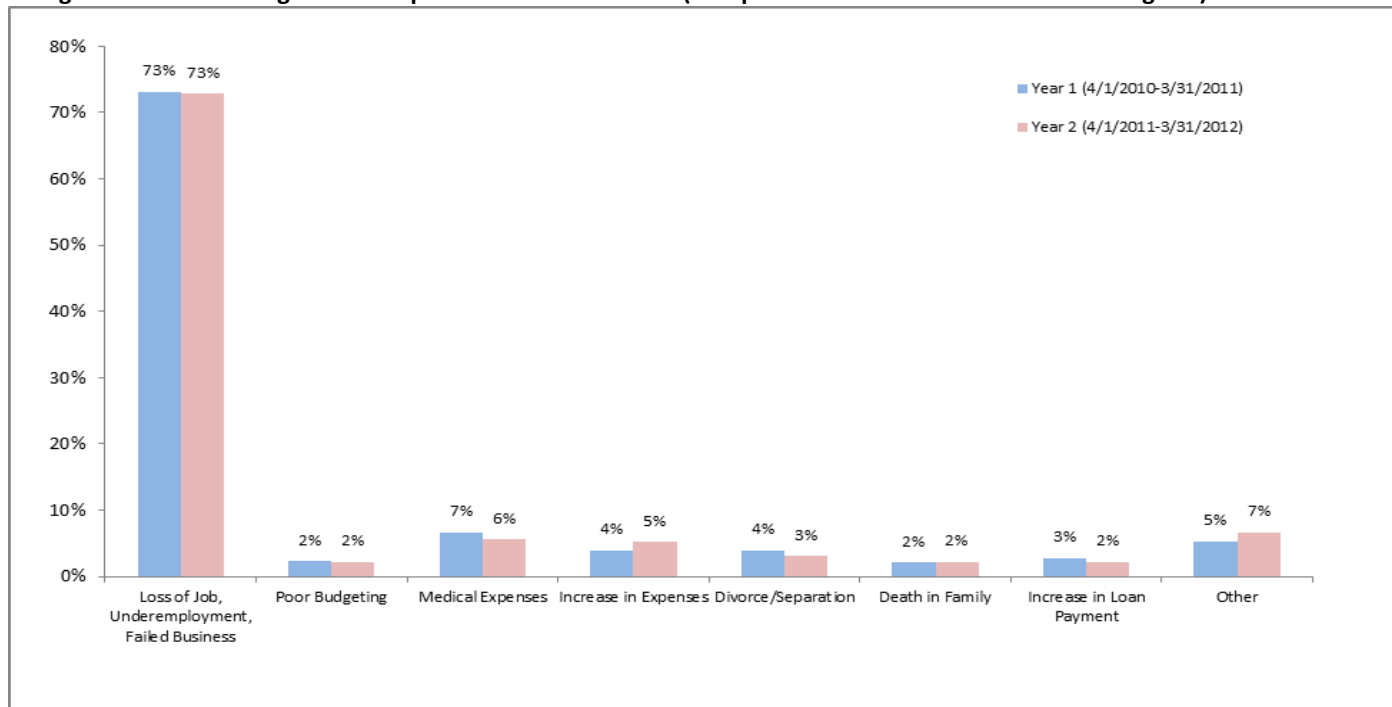
Mortgage foreclosures steadily and rapidly rose in Cook County over the past twelve (12) years resulting in record filings for the Circuit Court of Cook County (“Court”). According to the records of the Clerk of the Court, filings over the past decade are as follows:

2000	12,705	2003	15,815	2006	22,248	2009	47,049
2001	16,228	2004	15,632	2007	32,651	2010	50,621
2002	17,450	2005	16,494	2008	43,876	2011	41,135 ¹

As of May 31, 2012, there are 79,429 cases pending in the Circuit Court of Cook County. Approximately 85% of those pending cases are foreclosures involving residential properties. (For a more complete breakdown of foreclosure filing statistics, see **Appendix B.**)

Since 2009, the majority of the residential foreclosure filings have been for loans made to individuals with income, no credit problems, and no mortgage fraud. In other words, the working class and middle class families continue to go into foreclosure. Nearly three (3) out of every four (4) households are ending up in foreclosure because of unemployment. The unemployment rate is still at an all-time high and the households entering foreclosure have lost all or a substantial portion of household income due to job loss or other pay reductions. The reasons for default have remained consistent over both years of the Program:

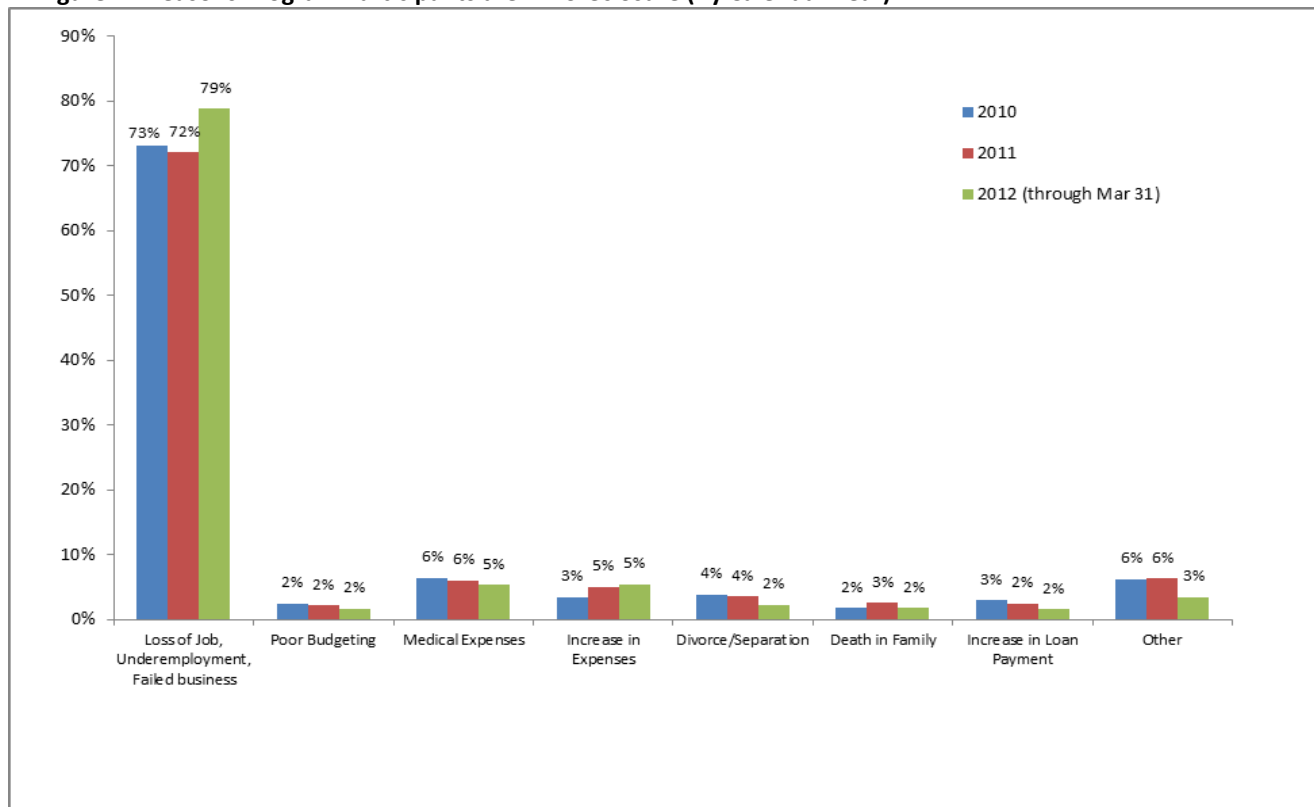
Figure 1: Reasons Program Participants are in Foreclosure (Comparison of First Two Years of the Program)²



¹ The drop in total new filings during the calendar year 2011 can be attributed to the moratoriums imposed on the large lenders (such as Bank of America, Wells Fargo, JPMorgan Chase, Citibank, etc.) for correction of paperwork and procedures that were faulty and discovered during the robo-signing scandal.

² Data for Figures 1 and 2 come directly from the HUD-certified housing counseling agencies providing services for the Circuit Court of Cook County Mediation Program. The agencies are required to report certain information to NeighborWorks America, the organization appointed by Congress to manage the National Foreclosure Mitigation Counseling (NFMC) Program. In addition to reporting this information to NeighborWorks America, the housing counseling agencies report NFMC information on the Mediation Program to the Illinois Housing Development Authority and the Circuit Court of Cook County. This data represents reasons for default indicated by Mediation Program participants who have completed housing counseling through the Mediation Program.

Figure 2: Reasons Program Participants are in Foreclosure (By Calendar Year)³



The data in Figure 1 and Figure 2 suggest that the continuation of foreclosure filings is directly tied to the unemployment rate in Illinois. The more income that is lost in a household, the more difficult it will be for that homeowner to sustain a modification and save the home.

GOALS OF THE PROGRAM

The purpose of the Program is to:

- Encourage Homeowners to Come to Court to Resolve Their Cases:** Pursuant to Chancery Division General Administrative Order No. 2010-01 entered on April 8, 2010, homeowners receive information about the Mortgage Foreclosure Mediation Program when they are served with Summonses in the mortgage foreclosure action. Also, plaintiffs' counsel are required to serve a Notice of Initial Case Management to the homeowner that also includes information on the Program and notification that they are able to call the Program hotline to start receiving help immediately.
- Reach Mutually Acceptable Agreements Between a Homeowner and Lender:** The Program assists Cook County residents facing foreclosure to reach a mutually acceptable solution with their lenders. If the home can be saved through a modification, the Program will assist in finalizing the modification. If the home cannot be saved (generally, due to lack of income), the Program will help the homeowner negotiate a dignified exit from the property and ensure that the homeowner has the assistance necessary in making alternative housing arrangements, such as finding rental assistance programs available in the neighborhoods.

³ Id.

- **Provide Free Legal Advice and Housing Counseling:** The Program provides resources to assist Cook County residents in foreclosure *at no cost to the residents*. Free assistance includes:
 - Legal advice (access to attorneys at no cost to the homeowner);
 - Housing counseling (access to HUD-certified housing counselors at no cost to the homeowner); and
 - Other resources that may be necessary for the homeowner (at no cost), such as rental assistance, veteran assistance, credit counseling, or other legal aid agencies to assist with additional legal issues.
- **Educate Homeowners:** The Program informs Cook County residents facing foreclosure about their rights and all the options legally available to them.
- **Assist Homeowners in Making Informed Decisions:** The Program assists homeowners with making informed decisions about how to strategically resolve their foreclosures and ensure that the homeowners understand all their options through multiple meetings with attorneys and housing counselors at no cost to the homeowner.
- **Ensure Equal Justice Under the Law:** The Program makes the legal process of foreclosure easier for self-represented litigants to understand their rights and responsibilities during foreclosure.
- **Discourage Abandonment of Property:** The Program encourages Cook County residents to stay in their homes if they are in default under the mortgage or have been served with a summons for a mortgage foreclosure case until they are legally obligated to leave.

HOW THE GOALS ARE MET

In light of the goals of the Program, the resources available have been implemented to assist homeowners in achieving the best results for their particular situation. In all cases, the best solution is unique to each individual case. Thus, in one case the best solution for a homeowner may be to leave the home while in another case, a homeowner's best solution may be a modification. Whatever the result, Program participants are educated and informed about all the options available to them. These goals are met by:

- **Saving Homes Whenever Possible.** Whenever a homeowner enters the Program with sufficient income to sustain a permanent modification to loan, the Program works to obtain that modification and dismiss the case.
- **Reaching Agreements Between a Borrower and a Bank.** Any agreement reached between a homeowner and a bank through the Program is a success because – no matter whether the homeowner keeps the home or transfers ownership to the bank – the agreement is mutually acceptable to all sides.
- **Keeping Borrowers in the Home as Long Legally as Possible without Detriment to the Bank.** If a homeowner has suffered a full or substantial loss of income in the household (e.g., job loss) making modifications of the loan impossible, the Program works to ensure that the homeowner understands why a modification is not possible and what the other options are in the foreclosure. In any case, homeowners will know their rights under the foreclosure and how long they can stay in the home. The

legal aid attorneys advise the homeowners that it is not necessarily in their interest to unwittingly delay the foreclosure process and will advise them about the best solution for a dignified exit. Whenever possible, the Program works to obtain a mutually acceptable agreement with the lender to negotiate enough time for the borrower to make alternate living arrangements and vacate the property with dignity.

- **Educating Borrowers and the Community.** The Program helps to inform homeowners about the foreclosure process. When homeowners voluntarily choose not to pursue any arrangements with the lender, they choose to do so after being fully educated about their rights under the law and the consequences of such a decision.
- **Treating Borrowers in Foreclosure with Dignity and Respect throughout the Legal Process.** Most homeowners in foreclosure do not have private attorneys and must come to court alone without an understanding of the process. The Program provides compassionate attorneys and housing counselors and neutral mediators to help homeowners learn how to represent themselves and to determine and achieve their goals. Everyone providing services does so with the utmost respect to the homeowner facing foreclosure.

Homeowners are requested to fill out a survey after completing the mediation process. The satisfaction rate has consistently remained high at 95 percent. While every home cannot be saved, maintaining homeowners' dignity and treating them with respect throughout the process is a success that may be difficult to measure but still invaluable.

PART II PROCESS

The basic process is the same for everyone going through the Program but the resolutions sought will be dependent on the income available to each homeowner going through the Program. *Nearly three (3) out of every four (4) homeowners entering the Program have fallen behind on their mortgage payments and entered foreclosure because the household has sustained total or substantial loss of the major household income due to unemployment.*

Step 1 – SUMMONS: Summons is prepared and issued by foreclosing bank.

Step 2 – OUTREACH:

- Community Outreach groups provide door-to-door and community informational events to educate homeowners about the Program and how to receive help.
- *Benefits to homeowner:*
 - Information about court
 - Guidance and assistance for making a housing counseling appointment or signing up for a housing counseling workshop
 - Single point of contact within in the community to ask additional questions
 - Fraud prevention

Step 3 – HOUSING COUNSELING WORKSHOP:

- Homeowners attend a 2-3 hour housing counseling workshop scheduled by calling the hotline or going on-line to request an appointment. The workshop is hosted by one of the HUD-certified housing counseling agencies working on the Program. They are held in the community and different times and locations. The workshop provides a tutorial about mortgage foreclosures and workout options and provides a brief intake meeting with a housing counselor. The one-on-one housing counseling appointment is scheduled at the completion of the workshop.⁴
- *Benefits to homeowner:*
 - Information about mortgages and mortgage foreclosure
 - Single point of contact with a HUD-certified housing counselor in the neighborhood
 - Screening for mediation eligibility
 - Flexible times
 - Folder with a process map to follow and retain documents
 - Fraud and scam avoidance

Step 4 – INDIVIDUAL HOUSING COUNSELING APPOINTMENTS

- Individual housing counseling appointments are meetings with a housing counselor after completion of the housing counseling workshop. The homeowner meets with a housing counselor to review financial documents and to prepare income packets that will assist homeowners in obtaining a loan modification or other workout option with the bank. A single household needs on average 9.8 hours of individual housing counseling to reach an agreement or until mediation occurs.

⁴ If a homeowner is uncomfortable with a group setting or has a court date in the immediate future, a homeowner can bypass the workshop and be scheduled with one of four housing counselors on-site at the court to be seen immediately for an individual housing counseling appointment.

- *Benefits to homeowner:*
 - A single point of contact with a HUD-certified housing counselor in the homeowner's community
 - Assistance in determining the best options available to the homeowner
 - Assistance in determining an affordable budget and reassessment of living expenses
 - Fraud and scam avoidance

Step 5 – PRE-COURT LEGAL AID

- Pre-court legal aid is legal advice given by the Chicago Legal Clinic at no cost to the homeowner. Chicago Legal Clinic attorneys are located at the Chancery Advice Desk (Richard J. Daley Center, Room 1303), the mortgage foreclosure courtrooms (Richard J. Daley Center, 28th Floor hallway), and at 69 West Washington Street. The attorneys do not represent the homeowners in court but give legal advice and assist homeowners in preparing the proper documents for court.
- *Benefits to homeowner:*
 - A single point for free legal advice
 - Education and information about the legal process
 - Education and information about the homeowners' rights and responsibilities during the foreclosure process
 - Fraud and scam avoidance

Step 6 – IN COURT CASE MANAGEMENT/STATUS HEARINGS

- In-court case management is the management of cases by a case manager. Case managers are attorneys employed by the court to assist the judge and the judge's staff to screen cases for mediation. They do not give legal advice and are neutral but they do facilitate information exchange between the parties where a homeowner is trying to negotiate an agreement with the bank.
- *Benefits to the homeowner:*
 - Single point of contact at the court
 - A court employee to answer questions and to direct to the right resources
 - An ability to speak with court staff at the hearing prior to and after appearing before a judge and have procedural questions answered

Step 7 – PRE-MEDIATION CASE MANAGEMENT/STATUS HEARINGS

- Pre-mediation case management is a continuation of Step 6, where the case managers follow-up on court ordered instructions to exchange information between the parties. Pre-mediation case management is the direct oversight by the court of document exchange prior to any referral to mediation. This front-end oversight provides accountability for both the homeowner and the bank and ensures that only those parties who are seriously negotiating an agreement and have an issue are mediated and that those cases that can be resolved without mediation are resolved in a timely manner.
- *Benefits to the homeowner and the bank:*
 - Equal accountability for both the homeowner and the bank
 - Single point of contact at the court to report status of the case prior to a court hearing (more efficient court hearings)

Step 8 – MEDIATION

- Mediation is a conversation facilitated by a neutral third party who is not the judge. It is an opportunity for both the bank and the homeowner to sit down with each other at a table and have a conversation about the legal issues in court. The conversation will determine whether a resolution is available that all parties will agree to. An attorney is provided to any unrepresented homeowner for the mediation sessions. The attorney is provided at no cost to the homeowner.
- *Benefits to the homeowner:*
 - An opportunity to save the home
 - An opportunity to be heard outside of court
 - An opportunity to talk to the bank outside of court
 - An opportunity to have representation by a lawyer during discussions with the bank
 - Education about which resolutions will work for the homeowner and the options the homeowner has available

Step 9 – POST-MEDIATION STATUS HEARING

- Post-mediation status hearings are those hearings before a judge to explain the outcome of mediation or to provide the parties additional time to complete the mediation and finish their conversation about potential resolutions to the pending foreclosure.

PROGRAM CHANGES SINCE AUGUST 1, 2011

During the second year of the Program, the Court has implemented many significant changes to the Program:

- **Case Manager System:** The court has hired nine (9) Case Managers for the ten (10) mortgage foreclosure calendars. All nine Case Managers are attorneys⁵
 - *What do the Case Managers Do?* The Case Managers' role is not to provide advice to either side. Rather, the case manager is a neutral party who keeps updated information on residential foreclosure cases. They assist on those cases where a homeowner is self-represented, lives in the home, and is trying to reach an agreement with the bank. The case managers triage the cases as they come to court, follow-up on the steps taken and report the status of the case to the judge prior to the next status date.
 - *Why does the court and the Program need case managers?* Case managers became necessary for multiple reasons. On the administrative side, managing nearly 80,000 cases efficiently with ten foreclosure calendars, requires the use of an additional person to adequately keep track of cases. In those cases where a homeowner is participating and actively trying to reach an agreement with the bank, the judge is now able to order each side – the bank and the homeowner – to complete certain document exchange for a modification or another workout attempt prior to any referral to mediation.

⁵ The Case Managers began working in January 2012. The job postings were listed in early September 2011 but the hiring process was delayed because of uncertainty with the Cook County budget process. All nine attorneys have diverse backgrounds and are dedicated to public interest work. Of the nine, three are African-American, one is Hispanic, one is Asian-American, four are Caucasian. Three speak Spanish and six are women. All attorneys have been in practice 3 or more years.

For the forms utilized by the case managers, see **Appendix C**.

- **Housing Counseling Community Workshops:** The housing counseling system was enhanced to require that homeowners attend a 2-3 hour housing counseling workshop prior to having one-on-one counseling sessions. These workshops are structured to educate homeowners about the basics relating to foreclosure and workout options and also provide a brief one-on-one intake session with a counselor. The homeowner leaves the workshop with an appointment with a housing counselor. (If a homeowner is uncomfortable with a group setting or has a court date coming up within the next week, an option to go directly to a one-on-one appointment at court is available.)
 - *Why does the Program need housing counseling workshops?* The workshops serve multiple purposes: (1) they provide a “soft entry” into the Program through a group setting of similarly situated households in the community to explain and answer basic questions; (2) they bring the initial housing counseling into the communities and allow the homeowners to begin taking advantage of the free resources before coming to court; and (3) they give the homeowner a point of contact in the neighborhood.
- **Housing Counseling Reimbursement Structure:** The Program shifted to a fee-for-service structure with the housing counseling agencies working on the Program. Previously, counseling agencies were reimbursed on a flat fee basis. HUD-certified housing counseling agencies are now compensated based on the quality of the work. Housing counselors now have to complete workshops (\$500/workshop), and submit completed files (a total of \$500/file allowed for reimbursement).
 - *Why did the Program need the change in fee reimbursement for housing counseling?* Early feedback was given to the Court about the quality of the housing counseling being provided. After a group of service providers met several times during the course of the year to discuss this issue, they provided a recommendation to change the compensation structure.⁶ The structure now mirrors the reimbursement system allowed under the federal National Foreclosure Mitigation Counseling (NFMC) Program.
- **Folder with Process Steps and Map:** The Program has been working to complete an informative folder for homeowners. The folder is meant to serve three functions: (1) serve as a repository for all the homeowner’s paperwork so that all the documents are readily available for all service providers; (2) provide the homeowner with a step-by-step reference of the parts of the Program and a way to record when each step was completed; and (3) provide homeowners with a quick reference of where to go for help and to complete required steps.

⁶ The group of service providers that met on a regular basis consisted of: legal aid and mediation representatives (Chicago Bar Foundation, CVLS, Chicago Legal Clinic, Legal Assistance Foundation, Center for Conflict Resolution), housing counseling representatives (IHDA, NHS, Housing Action Illinois, Northwest Side Housing Center), community organization representatives (ActionNOW, Chicago Community Trust) and the Plaintiffs’ bar representatives (Codilis).

PART III Program Results

The Program started, in part, on April 19, 2010. As a result, the Court now has nearly two full years of data to report. From April 19, 2010, through April 30, 2012, the Program has assisted many Cook County Residents:

- 87,807 people called the hotline
- 57,261 people received free legal assistance at court
- 53,264 housing counseling sessions were completed
- 29,604 homes were visited by community outreach workers
- 19,023 housing counseling sessions were scheduled through the hotline
- 13,609 people were spoken to about the Program by outreach workers
- 4,967 mediation sessions were held
- 4,072 cases were referred to mediation and appointed free representation at the mediation
- 3,434 cases completed mediation
- 2,149 households attended housing counseling workshops (started in September 2011)
- 1,742 cases reached an agreement with the bank (51%)
- 1,304 cases reached an agreement with the bank to keep the home (38%)
- 71 housing counseling workshops held (started in September 2011)

These results are promising. The second year of the Program has shown a 10% increase in the number of homes saved through the Program and a steady 51% rate of success in reaching agreements with banks through the mediation process. These results are consistent, if not better, than other comparable programs in areas with a similar foreclosure rate to Cook County.

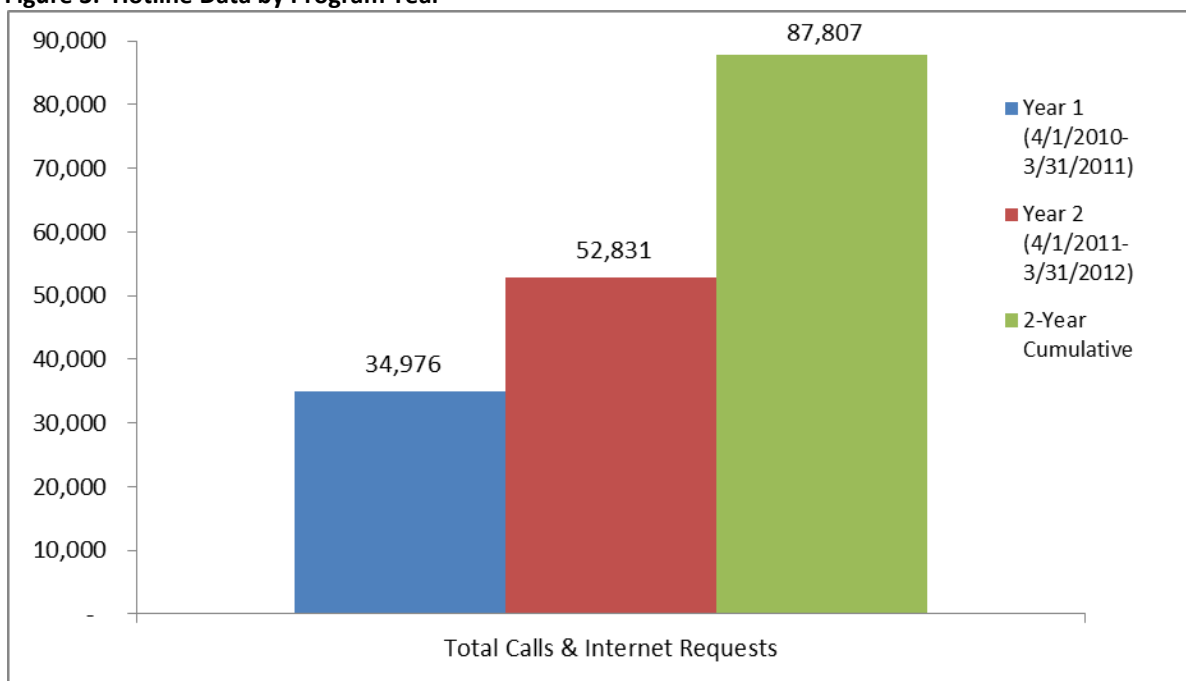
Following is a summary of the results in each of the three main areas of professional services. Data is provided to the Court from the contracting parties: The Chicago Bar Foundation, Illinois Housing Development Authority, and The Chicago Community Trust. Each of these three agencies oversee and manage the legal aid and mediation services, housing counseling services, and outreach services, respectively. The data is reported to them by their subcontracting service providers and in turn reported to the Court.

Hotline and Housing Counseling

The hotline for the Program is operated by the Illinois Housing Development Authority (IHDA). IHDA also oversees all the housing counseling services provided to the Program participants.

The hotline continues to show high volume (see Figure 3 below). During the second year of the Program, the Program participants started reporting that they learned of the hotline from the summons on the court papers when they were served. As of August 2011, 2% of hotline callers reported being referred by the summons, 1% reported being referred by the Court, and 1% reported being referred by the outreach workers. The remainder did not report who referred or where they learned of the information.

Figure 3: Hotline Data by Program Year⁷

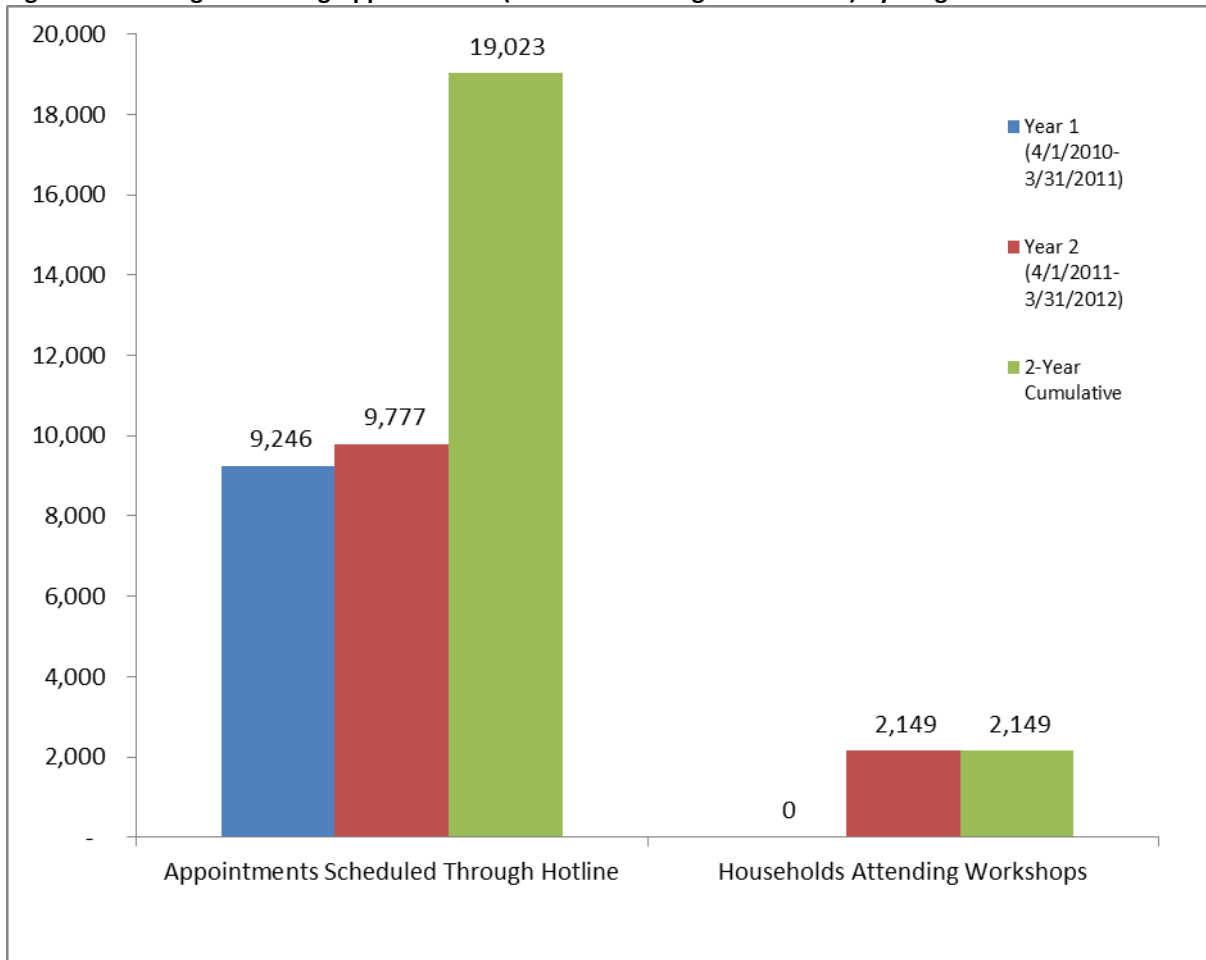


Additionally, housing counseling appointments scheduled through the hotline remain strong (see Figure 4 below). There was a 6% increase in the number of housing counseling sessions scheduled through the hotline from Year 1 to Year 2. While the call volume may seem significantly higher than the number of appointments scheduled, approximately 11% of callers are referred to different resources because the Program is not appropriate (or the caller is ineligible) and many calls are to ask follow-up questions about appointments or reschedule an appointment.

Moreover, in the second year of the Program, the Court initiated housing counseling community workshops as a method to strengthen the quality of housing counseling services and provide easier access for Program participants. Since September 2011, there have been 71 workshops held throughout Cook County. 2,149 households have attended these workshops. (See Figure 4 below.)

⁷ Data for Figure 3 provided by the Illinois Housing Development Authority.

Figure 4: Housing Counseling Appointments (Scheduled through the Hotline) by Program Year⁸



Pre-Court and In-Court Legal Aid

As part of the legal aid and mediation services administered by The Chicago Bar Foundation, the Chicago Legal Clinic provides six (6) attorneys (two at no cost to the County) dedicated to providing free legal advice to homeowners in foreclosure. The legal advice is available four different ways:

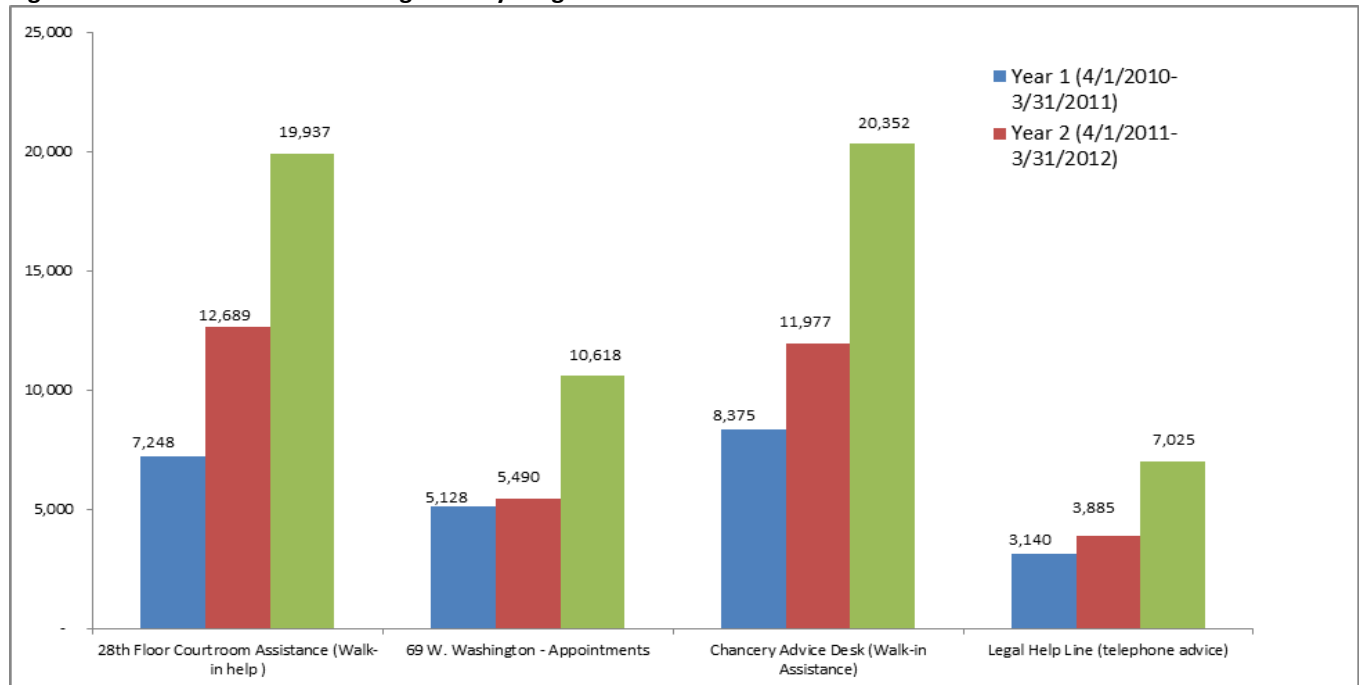
- *Walk-in Service – Chancery Advice Desk (Daley Center Room 1303):* Any unrepresented homeowner may go to Room 1303 between 9:00AM and 4:00PM and receive free legal advice on a first come-first serve basis. The lawyers will assist and advise the homeowners on all aspects of the case.
- *Walk-in Service – 28th Floor, Daley Center:* Any unrepresented homeowner who is on the 28th Floor for court (where all the foreclosure courtrooms are located), may meet with the attorney sitting in the hallway to answer questions and receive legal advice before or after the homeowner attends court.
- *By Appointment – 14th Floor, 69 W. Washington Street:* A homeowner who has met with a HUD-certified housing counselor will receive an appointment with an attorney to receive free legal advice and continue the steps for the Program.

⁸ Data for Figure 4 provided by the Illinois Housing Development Authority.

- *Over the Phone:* The phone line is available for brief legal advice and to answer basic questions for those homeowners who may have difficulty going downtown during the daytime working hours.

The attorneys working on the Program may see anywhere between 50-80 people per day seeking legal advice on a foreclosure. To date, the attorneys have assisted more than 57,000 people with legal advice. (See Figure 5 below.)

Figure 5: Pre-Court and In-Court Legal Aid by Program Year⁹



Mediation Outcomes

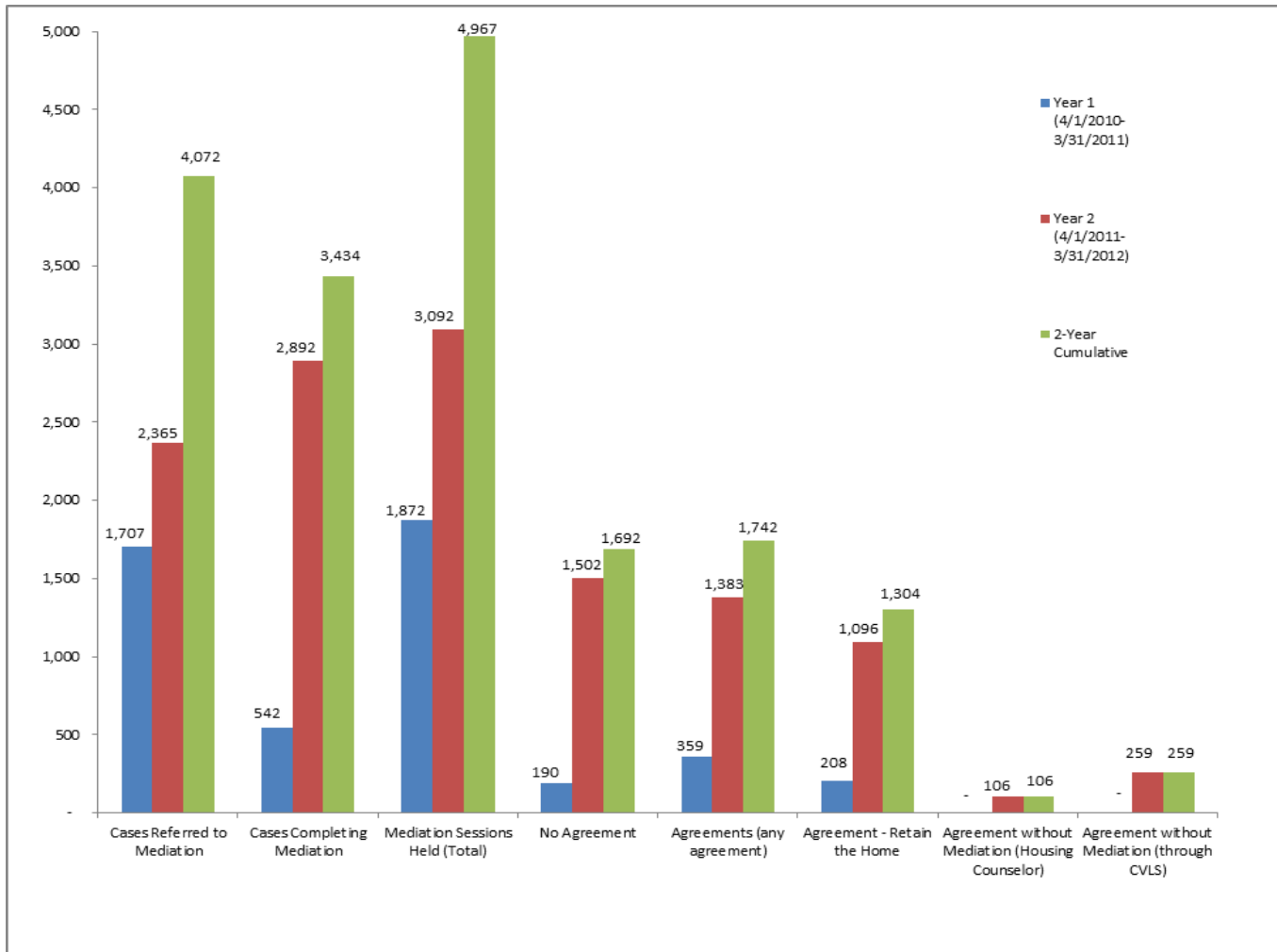
An additional part of the legal aid and mediation services administered by The Chicago Bar Foundation include mediation services and legal representation at mediation sessions at no cost the homeowner. Chicago Volunteer Legal Services (CVLS) is appointed in almost every case referred to mediation. During the second year of the Program, the following increases are notable:

- 39% Increase in the number of cases referred to mediation
- 65% Increase in the number of mediation sessions held
- 300% Increase in the number of cases reaching an agreement with the bank
- 500% Increase in the number of cases completing mediation

The data in Figure 6 below show these increases in positive mediation outcomes.

⁹ Data for Figure 5 provided by the Chicago Legal Clinic as reported to The Chicago Bar Foundation.

Figure 6: Mediation Outcomes by Program Year¹⁰



Community Outreach

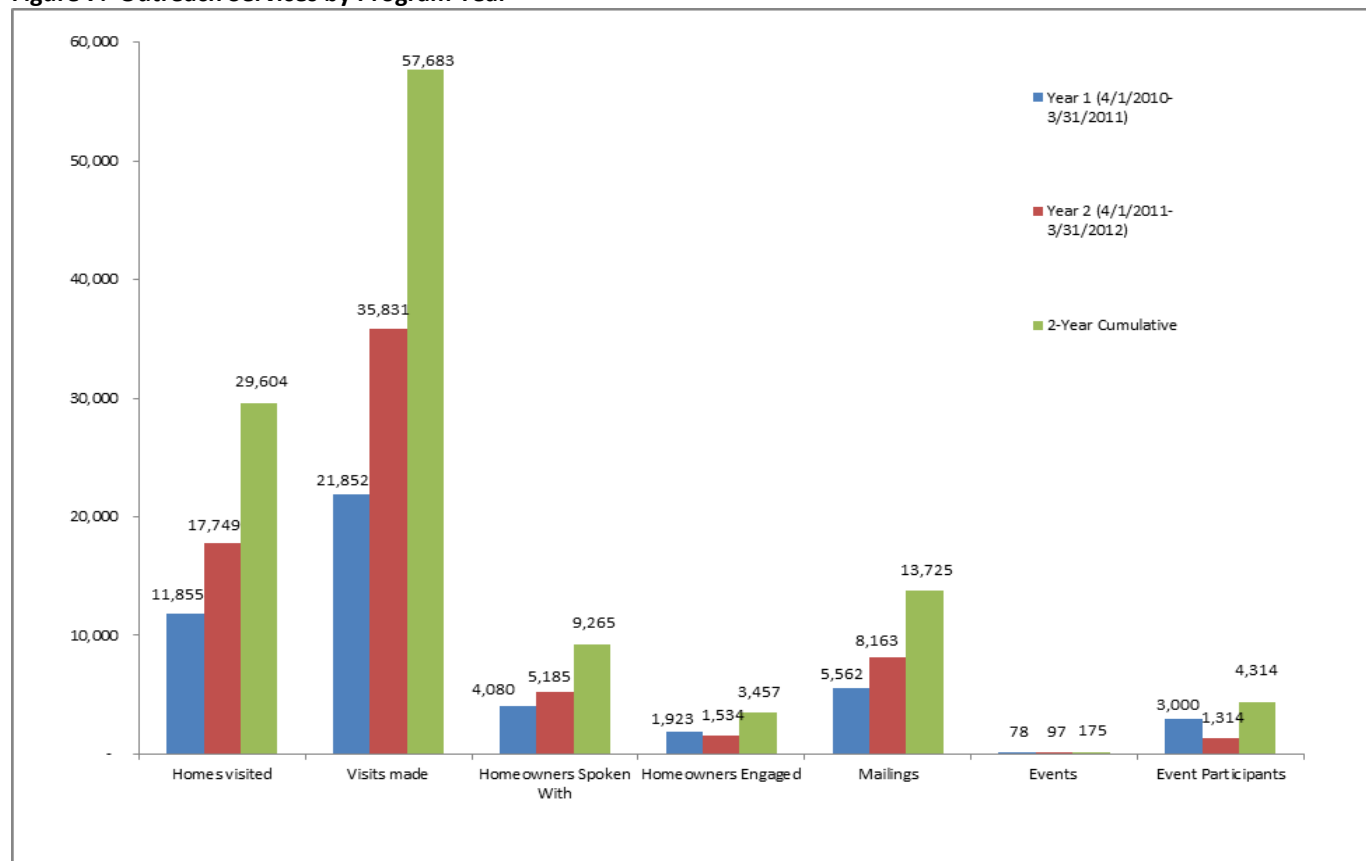
Community outreach is administered by The Chicago Community Trust which oversees ten (10) community organizations to visit the hardest hit Cook County neighborhoods. Door-knocking is used as a neighborhood oriented method for informing and educating homeowners who have recently gone into foreclosure about the Program and the free resources available. That means the information comes to the homeowners from a trusted source within the community rather than the homeowner needing to seek out assistance or fall victim to a fraudulent scheme.

For every home that enters foreclosure, outreach workers must make an average of two (2) visits to either make contact with a homeowner or determine that no contact can be made. Door-knocking also facilitates information dissemination to renters who will need different advice and allows for collection of information on vacant and abandoned properties for municipalities. In addition to door-knocking, the outreach groups send out mailings and host community events to reach as many homeowners as possible. During the second year of the

¹⁰ Data for Figure 6 provided by The Center for Conflict Resolution, Chicago Volunteer Legal Services Foundation, and Illinois Housing Development Authority (resolutions by housing counselors).

Program, and while maintaining the same budget, outreach workers were able to increase the number of visits made by 64%. (See Figure 7 below.)

Figure 7: Outreach Services by Program Year¹¹



As Figure 7 demonstrates, the focus of the community organizations is on reaching homeowners on an individual basis through door-knocking. To complement door-knocking and to reach some of those homeowners who may not be reachable through door-knocking, the organizations host community events. Attendance at the community events may have – on an overall basis for the year – dropped; however, that decline is due in part to successful efforts of door knocking and because the events that were held were on a smaller scale.

¹¹ Data for Figure 7 provided by The Chicago Community Trust, as reported by the outreach organizations. For additional detail, please see The Chicago Community Trust report attached at **Appendix D**. Please note that direct reports from the other vendors is too voluminous for inclusion with this report. Additional information and data will be provided upon request.

PART IV BUDGET AND GOALS FOR AUGUST 1, 2012-JULY 31, 2013

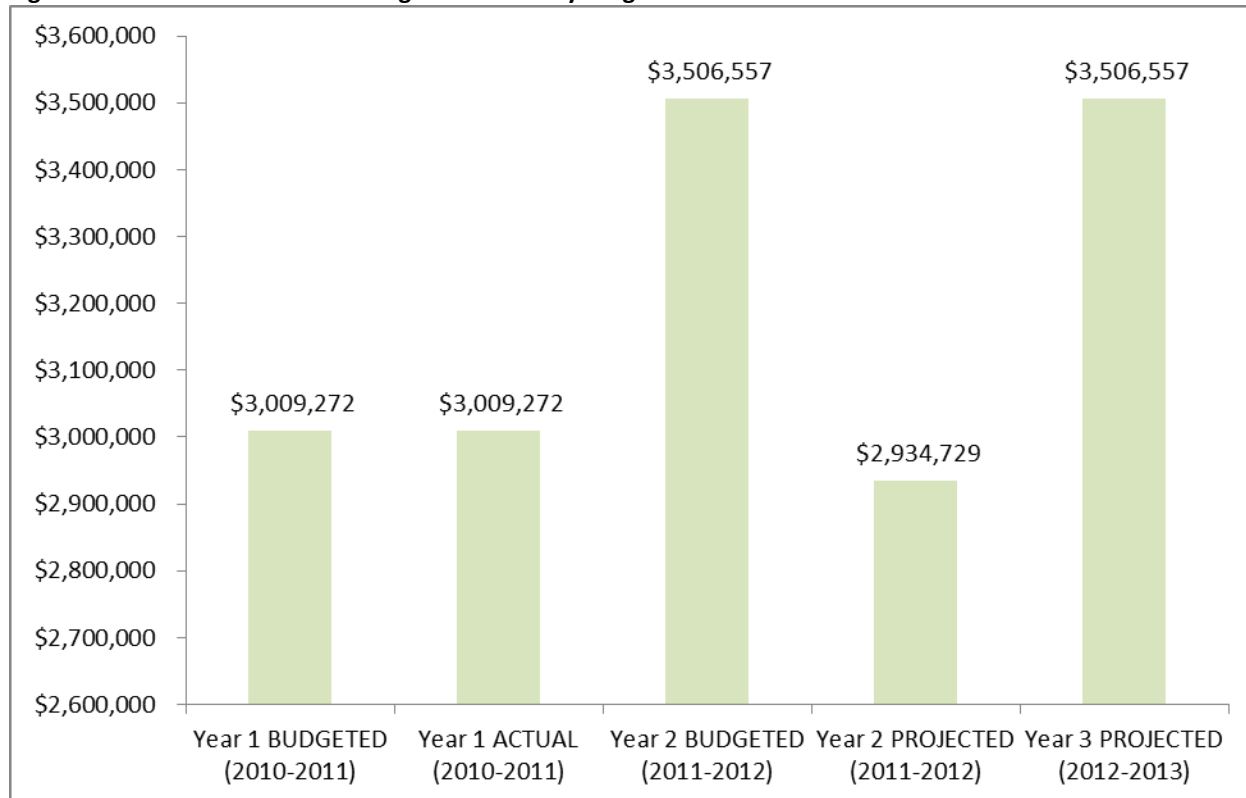
Because the Court recognizes that mortgage foreclosures are complicated by the very nature of the law, feedback on the Program is important, particularly from individuals going through the Program. The Court's primary concern continues to be that no one is "lost" in the system or is unduly confused by the Program.

Over the course of the next several months, the Court plans to review those aspects of the Program which may need to be further modified to improve and enhance the delivery of services to the homeowners in foreclosure. The Court has already seen improvement in results from the changes made within the last year and the Court expects that modifications to enhance those changes will only refine the Program with greater efficiency. The primary focus in the next year will be to fine tune the case manager system and eliminate the back log of cases waiting for mediation.

Budget Overview

The Court has actively sought to keep professional service cost amounts to a minimum. As Figure 8 below demonstrates, the professional services budget increased on an annual basis by just under \$500,000. Due in part to shift to a fee-for-service structure in housing counseling, the projected expenses for the second year of the Program appears to be just about \$571,000 under budget for the second year and \$74,000 under the amount spent in the first year of the Program.

Figure 8: Professional Services Budget Overview by Program Year



The second year of the Program came in under budget due to the shift to a fee-for-service arrangement between IHDA and the HUD-certified housing counseling agencies. This arrangement allowed for reimbursement for a certain number of workshops upon completion and reimbursement upon submission of

completed housing counseling files to IHDA and CVLS. This structure demanded a higher level of service from the housing counselors and required additional training by IHDA to make sure that the service provided met IHDA's expectations.

The savings in actual costs during the second year of the Program under the IHDA contract can be attributed to two major reasons:

- Implementation: Since this was a modified compensation structure on a going forward basis, files did not start coming to IHDA for reimbursement until September 2011 (one month after the contract renewal).
- Tiered payout structure: The fee-for-service compensation model now employed by IHDA has a tiered payment structure as follows:
 - \$150 per case upon submission of a complete loan modification packet to the bank/servicer (proof of submission must be available)
 - \$350 per case when the case either (1) is resolved by the housing counselor (a modification or other resolution is finalized) without mediation; or (2) the case is referred to mediation, CVLS is appointed, and the housing counselor gives a complete and updated packet to CVLS.
 - \$500 if a housing counselor resolves the case with no prior submissions. (i.e., \$500 is the maximum allowed for a single case, there is no double billing).

Under this tiered structure, many housing counselors submitted files at the first step of the process (\$150 – loan modification packet submitted) and are either still trying to workout a resolution or the case is waiting for a judge to refer it to mediation. As a result, many factors are currently being addressed by the Court and IHDA. Many files were not complete and needed to be fixed so IHDA has not paid out on those files to date and the number of \$350 or \$500 files submitted is much lower than anticipated a year ago.

As a result, IHDA has not needed to pay on as many files during the second year of the Program while the housing counseling agencies correct the files for reimbursement and receive additional training on the quality of service required by the Program. The Court and IHDA expects that the file submission will catch up as housing counselors refine their skills and the backlog in mediation is eliminated (i.e., files waiting will then move to the \$350 tier for compensation). However, based on the second year's performance, IHDA has reduced the compensation structure to a maximum of \$450/case file, rather than \$500/case file, to match the NFMC reimbursement schedule and to accommodate a reduced budget for the third year. As with any fee-for-service structure, there will be a limited number of files that may be reimbursed under this budget, but under the extrapolation from the second year, and allowing for a catch up of files, the reduction should still be sufficient to cover files submitted during the third year of the Program.

Notwithstanding the decrease in housing counseling reimbursement during the second year of the Program, the Court expects the total amount for professional services to remain the same for the third year of the Program (for a total cost of \$3,506,557) in order to more aggressively tackle the backlogs. Figure 9 below demonstrates the change in professional services budgets for the third year, as compared to the previous two years.

Figure 9: Professional Services Budget by Program Year and by Vendor



A comparison of the individual vendor budgets over the years is as follows:

Figure 10: Community Outreach Professional Services Budget by Program Year

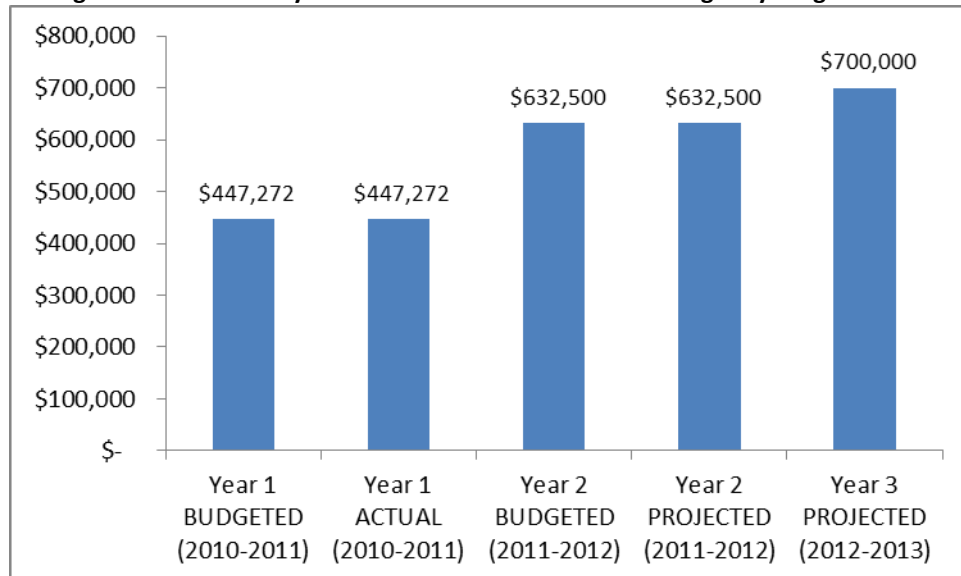


Figure 11: Legal Aid & Mediation Professional Services Budget by Program Year

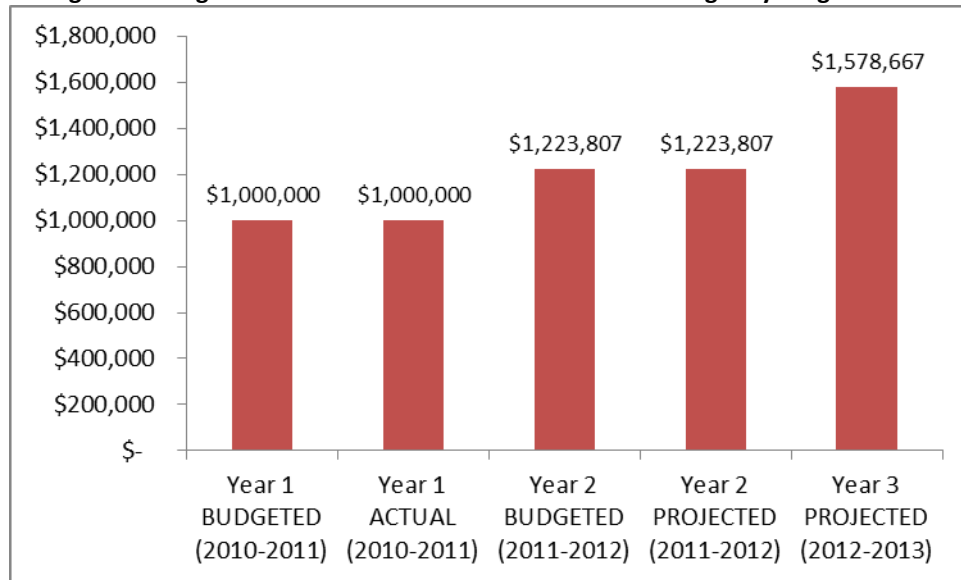
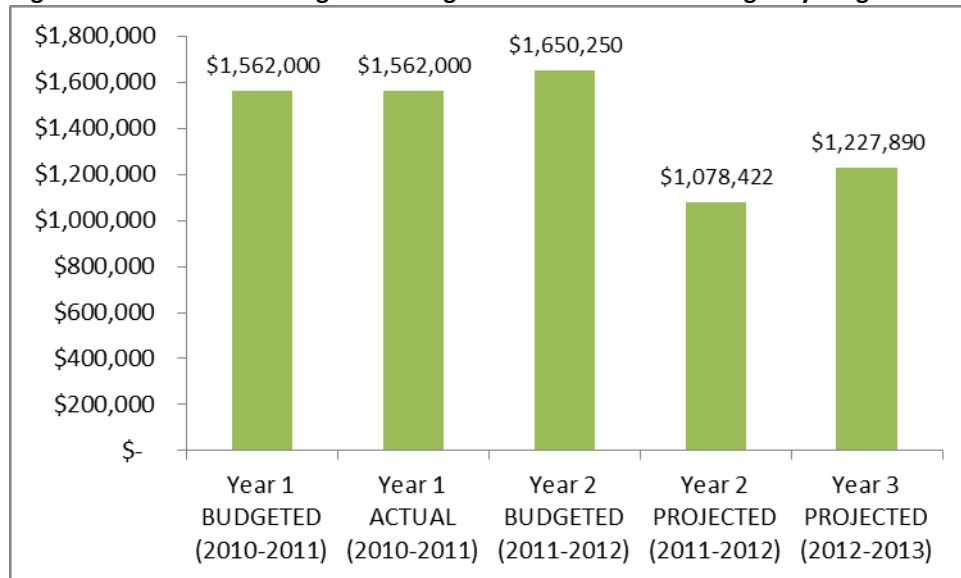


Figure 12: Hotline & Housing Counseling Professional Services Budget by Program Year



Appendix E contains a line-item detail of the budgets for each vendor in the Program for the third year. As those budgets demonstrate, the Court proposes to shift the expected decrease in housing counseling funds to legal aid and mediation:

- *Representation at Mediation Sessions:* Under The Chicago Bar Foundation contract, CVLS will receive an additional \$279,000 to add additional staff attorneys and paralegals to handle the mediations and the backlogged mediations. CVLS's capacity is currently insufficient to effectively tackle the large volume of backlogged cases to finish any document exchange that may not have been completed by the housing counselors. (The other two budgets – for CCR and CLC – will remain the same.)
- *Housing Counseling Services for backlogged mediation cases:* Under the IHDA contract, the budget for housing counselor file reimbursement has been significantly reduced based on the performance during Year 2 of the Program. Some of that reduction (\$210,000) has been set aside to have the top

performing housing counseling agency work directly with CVLS, CCR, and plaintiffs' attorneys to reduce and eliminate the backlog of mediation cases. The agency would provide 3 or 4 dedicated housing counselors and would also provide a single point of contact for CVLS, the bank attorneys, and CCR while also correcting and updating all documents needed for a productive resolution to a case. This solution, combined with the additional triage of cases being provided by the case managers, will reduce, and ultimately eliminate the backlogged mediation cases. Additionally, more training will be provided for the housing counseling agencies to improve their efficiency.

- *Community Outreach:* Outreach groups will be able to more effectively and efficiently reach homeowners in the different communities with a modest increase of \$67,500. This is the first increase requested for outreach services and will provide a greater opportunity to educate homeowners about the Program and prevent homeowners from falling victim to any of the foreclosure scams that are so prevalent.

Goals for the Third Year of the Program

While the Court has diligently worked to implement and modify Program services, changes may still be needed with time and feedback. The Court seeks to improve on the following services in the coming year:

- *Reduce the backlog in mediation cases:* As discussed above, the Court along with The Chicago Bar Foundation and IHDA have agreed on a method to resolve and eliminate the backlogged cases in mediation. Cases that are stuck in a backlog at any point in the process are not beneficial to the homeowner, the bank, or the Court. The Court is actively trying to eliminate this backlog with dedicated housing counseling services to those cases in an effort to resolve them as quickly as possible.
- *Improve quality of housing counseling services:* The Court and IHDA are working together with housing counseling agencies and with feedback from service providers and homeowners to improve the quality of housing counseling provided to homeowners. The Court and IHDA seek to ensure that only the highest housing counseling is provided in the Program while maintaining wide geographic coverage and limiting the budget. There will be additional and more frequent training for the housing counselors.
- *Improve the efficiency of mediation:* As part of the mediation backlog reduction strategy, the Court and The Chicago Bar Foundation and IHDA are working together with the newly added case managers to ensure that only those cases that are ready and have an issue to mediate go through to the formal mediation session. Whenever possible, these groups will try to reach a resolution as early as possible in the case.
- *Improve the efficiency of court hearings:* The Court expects that court hearings will become more efficient as the case manager process is adjusted and refined. The case managers are providing a valuable triaging system that will reduce backlogs while also providing much needed assistance for the judges hearing the cases.

APPENDIXES

APPENDIX A

CIRCUIT COURT OF COOK COUNTY • MORTGAGE FORECLOSURE MEDIATION PROGRAM UPDATE (STATISTICS)

Percentage of homeowners seeking assistance and who lost the income in the household (as of 4/30/12) (Unemployment is the reason for default)	79.1%	Other reasons for default: <ul style="list-style-type: none"> Medical expenses (4.61%) Divorce/separation (2.37%) Increased household expenses (5.71%) Increased loan payment (1.54%) Death in family (1.82%) Poor budgeting (1.44%) Other (3.41%)
Success rate of mediations (Defined as reaching an agreement with the bank)	51%	<ul style="list-style-type: none"> Agreement: 1 out of every 2 people reach an agreement with their lender in the mediation process. (1,742/3,434) <ul style="list-style-type: none"> 1 out of every 3 people (38%) obtain a permanent modification (save their home) in mediation. (1,304/3,434) This number includes those cases referred to mediation but where an agreement was reached without a mediator. 75% of the agreements reached are modifications (1,304/1,742) 1 out of every 5 people reach an agreement without a mediator. (651/3,434. This includes those cases referred to mediation but where <i>any</i> agreement was reached without a mediator.) No Agreement: 1 out every 2 people do not reach some sort of agreement with the lender. (1,692/3,434) NOTE: In August 2011, tracking of resolutions reached by housing counselors only (i.e., no referral to mediation is necessary) began. Since August 2011, there have been 106 reported resolutions reached by housing counselors.
Number of people requesting appointments or additional information or both (as of 4/30/12)	87,807	<p>Approximately 2/3 of people requesting appointments do not receive appointments because they are:</p> <ul style="list-style-type: none"> not in foreclosure and are only in default (about 1/2 of the callers) seeking information only (about 1/4) are renters in commercial property (about 1/3 of callers) choose not to schedule an appointment (small portion) <p><u>Those who do not receive an appointment through this Program are given referrals to the appropriate resources for free help.</u> There were 83,620 telephone calls to the hotline through 2/29/12. Average call time is approximately 3 minutes per call. The rest were requested through the internet form (4,187).</p>
Number of people spoken to about Program through community outreach workers (as of 4/30/12)	13,609	57,683 visits were made to 29,604 homes and 175 community events held since 7/1/10.
Housing counseling appointments scheduled through hotline (as of 4/30/12)	19,023	These are initial housing counseling appointments. Approximately 90-95% of these homeowners receive follow-up housing counseling sessions in the neighborhoods with their assigned agency.
Housing Counseling Workshops Held (as of 4/30/12)	71	Workshops are approximately two hours in total and require attendees to watch a 40 minute presentation and also complete a brief intake with the housing counselor to schedule a follow-up appointment. Workshops are hosted by the housing counseling agencies in neighborhoods throughout Cook County. Approximately 8-12 workshops are held each month.
Households at Counseling Workshops (as of 4/30/12)	2,149	Attendance rate of households at the workshops is 80% (i.e., 8 out of every 10 households show up for their scheduled workshops).
Number of people receiving free legal assistance with their paperwork at court	57,261	<p>Free legal advice is given by the Chicago Legal Clinic attorneys to any self-represented defendant in foreclosure. Advice is given as follows:</p> <ul style="list-style-type: none"> Immediately following the scheduled housing counseling appointment (10,512) At the Chancery Division Advice Desk (walk-in appointments) (20,143) On the 28th floor of the Daley Center outside the Mortgage Foreclosure Courtrooms (19,680) Over the phone (6,926)
Number of cases referred to mediation	4,072	<p>A case is referred to mediation when the judge enters a court order.</p> <p>Approximately half of the cases referred are currently waiting for a response from the bank about a HAMP modification. Mediation is a 12-week to 9 month long process.</p>
Number of cases completing the mediation process	3,434	The remaining 638 cases are currently in the mediation process. By court order, the bank cannot proceed on the foreclosure, and the defendant is gaining additional time in the home. There have been 4,967 mediation sessions held to complete 3,434 referred cases.

Performance Evaluation Measure	Current Volume (Cumulative)
Overall Program Performance:	
Program participants (any level)	175,826
Homes retained by agreement	1,304 (38%)
Success rate of mediations (any agreement reached)	1,742 (51%)
Participant satisfaction (at each service point): all parties, attorneys, and court employees	92%-95% (CLC & CCR only)
Program costs (Actual; Annual)	\$ 2,934,729
Program costs (budgeted; annual)	\$ 3,506,557
Completion time - filing date to disposition date (mediation cases) (days)	620 (est.)
Case clearance rate (dispositions/filings)	82%
Pending case load (dispositions/pending)	43%
The Chicago Bar Foundation (Legal Aid & Mediation):	
Resolutions without having to go to mediation (CVLS)	259
Homeowners provided legal advice (Chicago Legal Clinic)	57,261
Court-ordered appointments for representation at mediation (CVLS) (cases)	4,072
Court-ordered appointments for mediation (CCR) (cases)	4,072
Mediations scheduled (CCR) (cases)	4,072
Mediations sessions held (CCR)	4,967
Time to complete mediations (CCR) (hours/case)	2.7
Average sessions needed to complete mediation (CCR) (sessions/case)	1.45
Cases returned to mediation by subsequent court order (CCR & CVLS)	2,334
Time between entry of order and first mediation session (months)	9
Cancelled mediation sessions	2,130
Rescheduled mediation sessions	2,099
The Chicago Community Trust (Outreach):	
Participants learning of the program through CCT contact	14,487
Visits made	57,683
Properties (unique) visited	29,604
Visits per home	1.95
Homeowners contacted through visitation	9,265
Confirmed appointments known to outreach agencies	3,457
Community events	175
Homeowners attending community events	4,314
Mailings	13,725
Renters identified and given appropriate resources	2,900
Vacant units identified	2,701
Illinois Housing Development Authority (Hotline & Housing Counseling):	
Resolutions through housing counseling without mediation	106
Hotline calls received	87,807
People referred to other sources during hotline call (e.g., veterans/military assistance, renters legal assistance, housing counseling referrals for pre-foreclosure assistance, alternative housing assistance, etc.)	9,659
Hotline hours available (8:30 A.M. to 6:00 P.M. Mon-Fri) (hours)	47.5
Callbacks due to unavailable operators	4,579
Length of time per call (minutes)	2.93
Number of community workshops held	71
Attendance at community housing counseling workshops (households)	2,149
Attendance rate - housing counseling workshops	80%
Housing counseling sessions scheduled through hotline (initial sessions)	19,023
Housing counseling sessions completed	53,264
Time per session (minutes)	66
Hours provided by housing counselors per case	4.08
Hours provided by housing counselors per household to reach an agreement	9.8
Housing counseling sessions per household	3.71
Attendance rate - housing counseling appointments	80%

APPENDIX B

FORECLOSURE CASES PENDING/FILINGS AT END OF CALENDAR QUARTERS 2006-2012

Chancery Division, Circuit Court of Cook County

During the first quarter of 2012, there were 10,717 new mortgage foreclosure cases filed. During May 2012, there were 3,875 new mortgage foreclosure cases filed representing 5% decrease in filings from April 2012 but a 3% increase from March 2012 and a 20% increase from May 2011. As of May 31, 2012, there are 79,429 mortgage foreclosure cases pending. The number of pending cases is changed by the number of cases filed and the number of cases disposed. There have been 3,085 disposed cases during May 2012. May 2012 showed a continued increase in filings of new foreclosure cases that is consistent with the indications by the large lender firms that 2012 will show an increase in new foreclosure filings from 2011. Reasons for the slow increase in filings may be attributed to lenders' discretion, decisions to wait on filing due to the settlement talks with the attorneys general in Washington, D.C., and other changes to modification programs that may affect the lender's decision to initiate a foreclosure.

The anticipated filings in the second quarter of 2012 may be within the range of 11,968 to 13,261. As with previous attempts to estimate filings, it is appropriate to note that many external factors (social, economic, political, legislative, judicial, *et cetera*) may significantly impact the actual number of filings. The most significant impact that is expected to impact the 2012 filings will be the currently anticipated filing of new foreclosure cases that have been held by the banks due to lingering robo-signing issues.

The table to the right displays the number of cases pending and the total filings for each quarter from 2006 through 2012. Italics indicate that values for the quarter have been estimated. The number of pending cases may also be significantly affected by the MF Mediation Program and other factors affecting the number dispositions and the number of new filings.

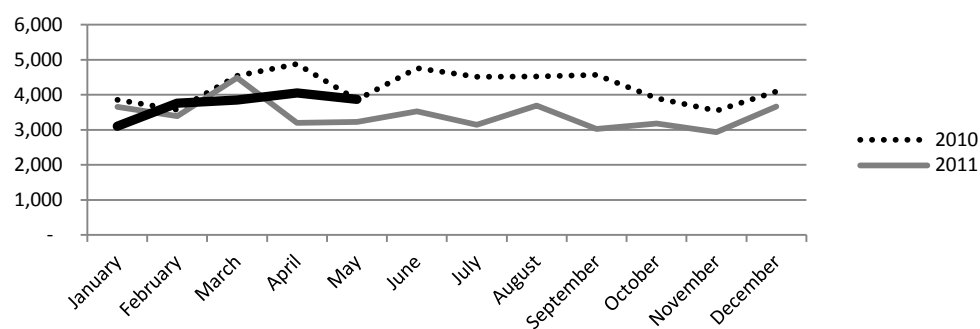
The charts below displays the number of monthly filings during 2010 and 2012 and also the historical number of filings, pending cases, and dispositions since 2002.

Quarter-Year	Pending	Filings
Q1-2006	16,031	4,829
Q2-2006	13,198	4,510
Q3-2006	12,539	5,434
Q4-2006	18,401	5,988
Q1-2007	20,389	7,496
Q2-2007	18,611	6,635
Q3-2007	25,511	8,323
Q4-2007	26,936	9,815
Q1-2008	32,044	10,833
Q2-2008	35,570	10,367
Q3-2008	37,627	11,382
Q4-2008	42,920	11,191
Q1-2009	45,331	13,296
Q2-2009	43,136	5,647
Q3-2009	46,231	14,102
Q4-2009	55,340	14,004
Q1-2010	60,766	11,979
Q2-2010	64,211	13,497
Q3-2010	67,223	13,603
Q4-2010	70,550	11,542
Q1-2011	74,154	11,532
Q2-2011	75,521	9,961
Q3-2011	76,923	9,866
Q4-2011	77,948	9,776
Q1-2012	78,048	10,717
Q2-2012 (e)	80,228	13,261

Monthly Filings (2010-2012)

	2010	2011	2012
January	3,859	3,658	3,101
February	3,578	3,390	3,764
March	4,542	4,484	3,852
April	4,879	3,203	4,055
May	3,861	3,225	3,875
June	4,757	3,533	
July	4,512	3,145	
August	4,522	3,691	
September	4,569	3,030	
October	3,903	3,177	
November	3,543	2,936	
December	4,096	3,663	
Yearly Totals	50,621	41,135	18,647

Foreclosure Filings by Month (2010-2012)

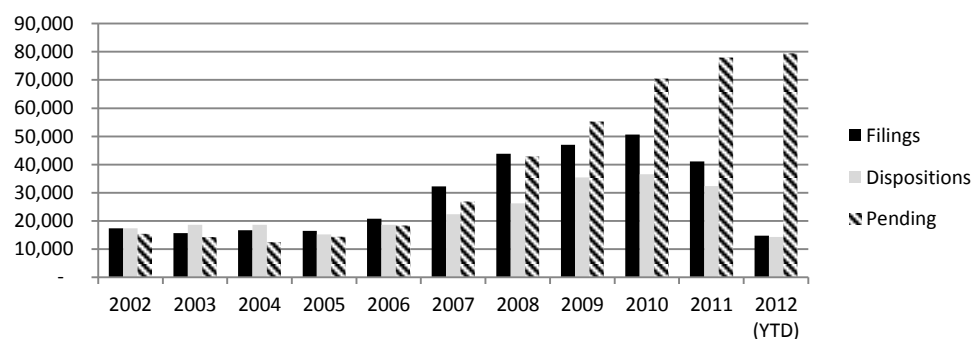


Yearly Filings Dispositions, and Pending Cases (2002-2012)

	Filings	Dispositions	Pending
2002	17,382	17,377	15,474
2003	15,616	18,567	14,249
2004	16,637	18,647	12,489
2005	16,497	15,152	14,442
2006	20,761	18,635	18,401
2007	32,269	22,293	26,936
2008	43,773	26,251	42,920
2009	47,049	35,410	55,340
2010	50,621	36,550	70,550
2011	41,135	32,344	77,948
2012*	14,772	14,255	79,429

*Year-to-date (through 5/31/12 only)

Filings, Dispositions, & Pending Cases (2002-2012 (YTD))



APPENDIX C

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, CHANCERY DIVISION**

)	
)	
Plaintiff(s),)	
)	
v.)	Case No. _____
)	Calendar No. _____
)	
Defendant(s).)	

**MORTGAGE FORECLOSURE CASE MANAGEMENT/STATUS ORDER
(Residential and Commercial)**

This matter coming before the Court for a case management conference pursuant to Supreme Court Rule 218; counsel for Plaintiff present before the Court and _____ present on behalf of Defendant(s); and the Court being advised in the premises;

IT IS HEREBY ORDERED AS FOLLOWS:

- ☐ 4619 This matter is continued for further case management to ____/____/20__ at _____ A.M./P.M. in Courtroom ____.
- ☐ By separate Order, the Defendant(s) _____
[Insert name(s) of Defendant(s)]
- ☐ 4974 are referred to the Access to Justice Program.
- ☐ 4421 Motion for Mediation is granted and this case is referred to mediation.
- ☐ 4331 This case is stricken from the case management call, the Court having determined that no further case management conference is necessary.
- ☐ 5246 Defendant failing to comply with the Case Management/Status order dated _____, _____,
- 4331 Defendant(s) Motion for Mediation is denied and the case is stricken from the case management/status call.
- ☐ 9203 Plaintiff failing to comply with the Case Management Status order dated _____, _____, this matter is stayed and the Plaintiff is prevented from seeking entry of judgment of foreclosure until full compliance with this order.
- ☐ 8099 This case is stricken from the call, the case having been previously disposed of by a Final Order entered on _____, _____. (Attach Final Order.)
- ☐ 8003 Dismissed with leave to reinstate, without costs, upon motion supported by Bankruptcy Court documentation filed within 90 days of resolution of Defendant(s)' pending bankruptcy.
- ☐ 8016 Dismissed, pursuant to Section 2-1009, with leave to reinstate upon Motion supported by Affidavit, filed and presented within one (1) year of this dismissal, if Defendant(s) default on the repayment plan, or other settlement agreement.
- ☐ 8005 This case is dismissed for want of prosecution.
- ☐ Other: _____
- ☐ This case is assigned to the Mortgage Foreclosure Case Manager for Calendar ____.
- Case Manager Name: _____
- Email: _____@cookcountyil.gov
- Telephone: (312) _____ - _____ Fax: (312) _____ - _____

Continued on Page B

IT IS FURTHER ORDERED AS FOLLOWS:

1. **DEFENDANT(S)** _____ having appeared in open court and representing that _____
_____;

(a) ☐ 4234 Defendant(s) is/are granted leave to file ☐ Appearance ☐ Answer/Otherwise Plead on or before ____/____/20____. Defendant(s) having represented that Defendant(s) seek(s) a loan modification and desire(s) to participate in the Court's Mortgage Foreclosure Mediation Program, then:

(b) ☐ Defendant(s) shall meet with a HUD-Certified housing counseling agency (1-877-895-2444) or the Illinois Attorney General Office – Consumer Protection Division (1-866-544-7151).

(c) ☐ 4215 Defendants(s) shall submit the documents identified below on or before ____/____/20____ to Plaintiff's counsel at the following address:

Plaintiff's Firm Name: _____

Responsible Attorney: _____

Address: _____

Work Telephone: (____) _____ - _____ Ext. _____ Work Fax: (____) _____ - _____

Email Address: _____

The following documents shall be submitted by the Defendant(s):

☐ Application for a loan modification, including a hardship affidavit if necessary.

☐ Bank statements for the period covering ____/____/____ through and including ____/____/____.

☐ Income tax returns filed for the period covering ____/____/____ through and including ____/____/____.

☐ Pay stubs for the period covering ____/____/____ through and including ____/____/____.

☐ Other: _____.

(d) ☐ 4215 Defendant(s) shall report the completion of the checked items above in 1(a) through 1(c) to the Case Manager by ____/____/20____.

(e) ☐ Defendant(s) represent(s) Defendant's current contact information is:

Address: _____

Telephone (1): (____) _____ - _____ ☐ Home ☐ Cell ☐ Work ☐ Other

Telephone (2): (____) _____ - _____ ☐ Home ☐ Cell ☐ Work ☐ Other

Email address: _____

2. **PLAINTIFF'S Counsel** having appeared in open Court and representing that:

☐ Plaintiff received Defendant's application for a loan modification, the application was incomplete and additional documents are needed from the Defendant(s).

☐ Plaintiff received Defendant's application for a loan modification and the bank/servicer has not reviewed the application.

☐ Plaintiff received Defendant's application for a loan modification and the bank/servicer denied the request for a modification on ____/____/20____.

☐ Plaintiff did not receive Defendant's application for a loan modification.

☐ Plaintiff's counsel has insufficient knowledge of any application for loan modification submitted by Defendant(s) to Plaintiff to confirm receipt or make any other representations.

☐ Other: _____

(a) 4215 Plaintiff shall:

☐ Report back to the Court the status of _____ on or before ____/____/20____.

☐ Review documents identified in 1(c) above on or before ____/____/20____.

☐ Review documents previously submitted by Defendant(s) on ____/____/20____ on or before ____/____/20____.

☐ Other: _____.

(b) ☐ 4215 Plaintiff shall make a decision on the Defendant's application for a loan modification on or before ____/____/20____.

(c) ☐ 4215 Plaintiff's counsel shall report the completion of the checked items above in 2(a) through 2(b) to the Case Manager by ____/____/20____.

Attorney No.: _____

Name: _____

Atty. For: _____

Address: _____

City/State/Zip: _____

Telephone: _____

ENTER:

Dated: _____, _____

Judge

Judge's No.

CASE NOTES

Case Manager Form

Cal.# _____

Interpreter? ☐ No ☐ Yes (_____)

Property Address
Street Address
Unit#
City
Zip Code

Defendant Atty

[illegible]

CASE MANAGER FORM - COURT USE ONLY

Cal.# _____

Interpreter? ☐ No ☐ Yes (_____)

Date _____

☐ Initial completion ☐ Revised

Case Number XX CH XXXXXXXX

Case Name

Property Address

Street Address
Code

Unit#

City

Zip

Lender/Servicer ☐ Ally/GMAC ☐ Bank of America ☐ Citibank ☐ JPMorgan Chase ☐ TCF ☐ Wells Fargo
☐ Other:

Mortgagor(s)

Note Signatory(ies)

Mortgage Signatory(ies):

☐ Yes ☐ No Loan is owned or guaranteed by a GSE, guaranteed or insured by any federal agency, and/or is serviced by a lender participating in MHA.

Eligibility for Programs under MHA (HAMP, 2MP, HAFA, UP, and including any of the programs adopted by Fannie Mae and Freddie Mac)

☐ Loan is **eligible** and a review is pending at this time.

☐ Loan is **not eligible because** (check all that apply)

- ☐ The loan's servicer does not participate in MHA.
- ☐ The property is not owner-occupied, is vacant, is condemned, and/or has more than 4 units
- ☐ The loan was originated on or after January 1, 2009.
- ☐ The unpaid principal balance of the loan prior to capitalization of any arrearages, fees, and other costs exceed the applicable limit:
\$729,750 for 1 unit;
\$934,200 for 2 units;
\$1,129,250 for 3 units; or
\$1,403,400 for 4 units.
- ☐ The loan's servicer does not have the contractual authority to modify the loan under MHA per investor guidelines.

☐ Loan is **eligible but borrower does not qualify** for the following reason(s) (check all that apply):

- ☐ Plaintiff (or its servicer) has made a "reasonable effort" to solicit the borrower* but:
 - ☐ Was unable to establish "Right Party Contact"
 - ☐ The borrower advised the plaintiff or its servicer that the borrower is not interested in participating in any of the above programs.
- ☐ Plaintiff (or its servicer) has not timely received all documentation necessary to complete a review for loss mitigation, specifically (check all that apply):
 - ☐ Proof of current income, specifically:
 - ☐ Completed IRS Form 4506T or 4506T-EZ
 - ☐ Dodd-Frank Certification
 - ☐ Request for Modification and Affidavit Form
 - ☐ Other:

KEY:	MHA	Making Home Affordable Program	2MP	Second Lien Modification Program
	HAMP	Home Affordable Modification Program	UP	Home Affordable Unemployment Program
	HAFA	Home Affordable Foreclosure Alternatives Program	HHF	Hardest Hit Funds Program (Illinois)
	VA	U.S. Department of Veterans Affairs	NPV	Net Present Value
	USDA	U.S. Department of Agriculture	GSE	Government Sponsored Enterprise
	FHA	Federal Housing Administration	* As defined under MHA Handbook Chapter II, Section 2.2.2, as amended.	

HAMP

<input type="checkbox"/>	The subject loan is not a first mortgage loan. (This denial reason applies to HAFA and UP as well.)
<input type="checkbox"/>	The total payment on the first mortgage (principal, interest, taxes, insurance, and association fees, if any) is less than 31% of the borrower's monthly gross income. (This denial reason applies to UP as well, unless the servicer has waived this requirement; with respect to Fannie Mae and Freddie Mac loans only, this denial reason applies to HAFA as well; for non-Fannie Mae and non-Freddie Mac loans, an additional denial reason must also be selected under HAFA.)
<input type="checkbox"/>	Payment cannot be feasibly reduced to make it equal to 31% of the borrower's monthly gross income without requiring excessive forbearance. (If selected, denial reason must also be selected under HAFA.)
<input type="checkbox"/>	NPV Calculation does not favor modification. (If selected denial reason must also selected under HAFA and UP.)
<input type="checkbox"/>	The borrower received a previous modification under HAMP effective ____/____/20____ and failed to comply or defaulted. (If selected, denial reason must also be selected under HAFA.)
<input type="checkbox"/>	The borrower received a trial plan modification but failed to make each payment by the end of the month in which it was due. (If selected, denial reason must also be selected under HAFA; but this denial reason applies to UP as well.)
<input type="checkbox"/>	Other (specify):

HAFA

<input type="checkbox"/>	The borrower did not respond to HAFA solicitations.
<input type="checkbox"/>	The borrower communicated that the borrower was not interested in pursuing HAFA.
<input type="checkbox"/>	The borrower did not return the signed Short Sale Agreement.
<input type="checkbox"/>	The borrower did not obtain a contract for sale within the time permitted under the program.
<input type="checkbox"/>	Other (specify):

2MP

<input type="checkbox"/>	Corresponding first lien has not been modified under HAMP
<input type="checkbox"/>	2nd lien has an unpaid balance of less than \$5,000.
<input type="checkbox"/>	2nd lien has a pre-modification scheduled monthly payment of less than \$100.
<input type="checkbox"/>	2nd lien has already been modified under 2MP.
<input type="checkbox"/>	2nd lien does not require payments until the first lien is paid in full.
<input type="checkbox"/>	Insured, guaranteed or held by FHA/VA/Rural Development.
<input type="checkbox"/>	Other (specify):

UP

<input type="checkbox"/>	No borrower was unemployed on the date UP was requested.
<input type="checkbox"/>	No borrower will receive unemployment benefits in the month of the UP Forbearance Period Effective Date.
<input type="checkbox"/>	The borrower's delinquency exceeds 12 months of the borrower's scheduled monthly mortgage payment, and the servicer has not waived this requirement.
<input type="checkbox"/>	Other (specify):

Eligibility for Programs under FHA, VA, USDA

<input type="checkbox"/>	The loan is subject to one of the above-listed entities loss mitigation programs and a review is pending at this time.
<input type="checkbox"/>	The loan is not subject to the above-listed entities' loss mitigation programs because the loan is not guaranteed, owner or insured by any of the entities.
<input type="checkbox"/>	The loan is subject to one of the above-listed entities' loss mitigation programs but does not qualify for the following reason(s) (check all that apply): <ul style="list-style-type: none"> <input type="checkbox"/> Plaintiff (or its servicer) has not received any response to solicitations for loss mitigation. (no other box needs to be checked) <input type="checkbox"/> Plaintiff (or its servicer) has not timely received all documentation necessary to complete a review for loss mitigation, specifically (list documentation needed): <input type="checkbox"/> The borrower is showing a deficiency when comparing monthly debt to income. (Check applicable boxes under FHA-HAMP and VA-HAMP). <input type="checkbox"/> Property is non-owner occupied. <input type="checkbox"/> Other (Specify):

FHA-HAMP

<input type="checkbox"/>	Payment on the first mortgage is less than 31% of the current gross income.
<input type="checkbox"/>	Payment cannot be feasibly reduced to make it equal to 31% of the borrower's current gross income without exceeding the partial claim limit.
<input type="checkbox"/>	The borrower received a previous modification under FHA-HAMP and failed to comply or defaulted.
<input type="checkbox"/>	Four full payments have not been made on the subject loan.
<input type="checkbox"/>	The first payment due date from loan origination is less than 12 months ago.
<input type="checkbox"/>	Back-end ratio is greater than 55%
<input type="checkbox"/>	The borrower qualified for a traditional home retention loss mitigation option but failed to sign and return the agreement or defaulted on the same.
<input type="checkbox"/>	Other (specify):

VA-HAMP

<input type="checkbox"/>	Payment on the first mortgage is less than 31% of the current gross income.
<input type="checkbox"/>	Payment cannot be feasibly reduced to make it equal to 31% of the borrower's current gross income requiring excessive forbearance.
<input type="checkbox"/>	Servicer has determined that foreclosure would be more advantageous to the VA than modification under VA-HAMP because (specify):
<input type="checkbox"/>	The borrower qualified for a traditional home retention loss mitigation option but failed to sign and return the agreement or defaulted on the same.
<input type="checkbox"/>	Other (specify):

ROBO-SIGNING AGREEMENT (*Subject to adjustment when the settlement is finalized)

<input type="checkbox"/>	Lender is a party to the robo-signing agreement (<input type="checkbox"/> Ally/GMAC <input type="checkbox"/> Bank of America <input type="checkbox"/> Citibank <input type="checkbox"/> JPMorganChase <input type="checkbox"/> Wells Fargo)
<input type="checkbox"/>	Lender notified homeowner of all loss mitigation options prior to foreclosure.
<input type="checkbox"/>	Loan modifications
<input type="checkbox"/>	Lender evaluated homeowner for all loan modifications.
<input type="checkbox"/>	Lender reviewed and made a determination on borrower's completed application within 30 days of receipt
<input type="checkbox"/>	Lender followed HAMP or GSE timelines, whichever was shorter for all other communication (missing documents, receipt of packets)
<input type="checkbox"/>	No dual tracking (foreclosure is stayed until a modification is reviewed)
<input type="checkbox"/>	Single point of contact at lender designated
<input type="checkbox"/>	Lender denied a modification
<input type="checkbox"/>	Lender denied the modification through a letter giving homeowner 30 days to rebut the denial
<input type="checkbox"/>	The denial was based on investor disallowance, name of investor is disclosed and the reasons summarized
<input type="checkbox"/>	Denial was based on negative NPV and the lender provided in the denial letter the monthly gross income and the property value that was used in the calculation.
<input type="checkbox"/>	Other (specify):

<input type="checkbox"/>	Borrower not eligible for HHF because in a trial modification with lender under HAMP or another program.
<input type="checkbox"/>	Borrower not eligible because the loan is an interest-only loan or a negative amortization loan.
<input type="checkbox"/>	Borrower meets the eligibility requirements:
<input type="checkbox"/>	Property in Illinois
<input type="checkbox"/>	Household income reduction of 25% (documented) due to unemployment or underemployment
<input type="checkbox"/>	Principal loan balance is not more than \$500,000
<input type="checkbox"/>	Household liquid assets cannot exceed \$10,000 or \$12,500 depending on county
<input type="checkbox"/>	Property is primary and only residence of all borrowers
<input type="checkbox"/>	Homeowner has a fixed or adjustable rate loan. (Can be a 1-4 unit building if resident lives in 1 of the
<input type="checkbox"/>	Current servicer agrees to accept payments from IHDA
<input type="checkbox"/>	Applicant has not been convicted of a mortgage-related felony the last 10 years.

[illegible]

CASE MANAGER FORM - COURT USE ONLY

Cal.# _____

Interpreter? ☐ No ☐ Yes (_____)

CASE INFORMATION

Case Number XX CH XXXXX

Case Name

Property Address

Street Address

Unit#

City

Zip Code

Mortgagor(s)

Plaintiff Atty

Defendant Atty

HUD Agency

Appearance? ☐ Yes Filed: ☐ No Answer? ☐ Yes Filed: ☐ No

HEARING INFORMATION

Hearing Date: Xx/xx/xx

Hearing Time:

☐ Initial Case Management

☐ Continued Case Management/Status (☐ 2nd ☐ 3rd ☐ 4th ☐ 5th)

☐ Plaintiff Motion (☐ SJ ☐ Default ☐ Other: _____)

☐ Defendant Motion (☐ Mediation ☐ Vacate Order ☐ Quash ☐ Other: _____)

☐ Continued Plaintiff Motion (☐ SJ ☐ Default ☐ Other: _____)

☐ Continued Defendant Motion (☐ Mediation ☐ Vacate Order ☐ Quash ☐ Other: _____)

☐ Post-Mediation Status (☐ 1st ☐ 2nd ☐ 3rd ☐ 4th ☐ 5th)

COMPLIANCE INFORMATION

Defendant complied with last Order? ☐ N/A
☐ Yes
☐ No. Explain:

Plaintiff Complied with last Order? ☐ N/A
☐ Yes
☐ No. Explain:

Any Agreement between parties? ☐ N/A
☐ Yes Explain:
☐ No

Other information given by parties:

Recommendation ☐ Continue for further case management/status
☐ Grant Motion for Mediation (see Mediation Section below)
☐ No Refer to Access to Justice Program (attach pre-prepared order)
☐ Strike from Case management/status call
☐ Deny motion for mediation for Defendant's failure to comply with previous order
☐ Stay case (Bank cannot get JFS) for Plaintiff's failure to comply with previous order
☐ DWP
☐ Dismissed with leave to reinstate within 90 days of resolution of bankruptcy
☐ Dismiss pursuant to 2-1009.
☐ Other:

MEDIATION INFORMATION

Defendant filed Motion for Mediation? ☐ Yes ☐ No

Defendant wants loan modification? ☐ Yes ☐ No
If yes, does defendant have income to sustain modification? ☐ Yes ☐ No. If no, explain:

Defendant wants Dignified Exit? ☐ Yes ☐ No
If yes, what type? ☐ Short Sale ☐ Deed-in-lieu ☐ Consent Foreclosure
☐ Negotiate Date to leave ☐ Other:

Mediation Held? ☐ Yes ☐ No ☐ N/A
If yes, any resolution? ☐ Yes (see below) ☐ No
Any further mediation sessions needed? ☐ Yes ☐ No

Any Agreement between parties? ☐ Yes ☐ No
If yes, explain: ☐ Trial modification ☐ Permanent modification ☐ Short Sale
☐ Deed-in-lieu ☐ Consent Foreclosure ☐ Negotiated Date to leave ☐ Other:

Other information given by parties:

Recommendation ☐ Grant Motion for Mediation. Issue to mediate (be specific):

☐ Deny motion for mediation for
☐ Defendant's failure to comply with previous order
☐ No issue to mediate. Explain:

☐ Continue for status for exchange and review of documents (prepare Status order identifying documents)

☐ Other:

OTHER INFORMATION FOR HEARING

CASE MANAGER FORM - COURT USE ONLY

Cal.# _____
Interpreter? ☐ No ☐ Yes (_____)

GENERAL INFORMATION

Case No.:		Property Address:			
Names/Parties			Appearance (date)	Answer (date)	
Plaintiff(s):		Defendant 1:			
		Defendant 2:			
Note Signatory:		Defendant 3:			
		Defendant 4:			
Mortgage Signatory:		Defendant 5:			
		Defendant 6:			

ATTORNEY CONTACT INFORMATION

Plaintiff Attorney:		Defendant Attorney:	
Contact Info:		Contact Info:	

CASE HISTORY

Date referred to Mediation:			
Next Court Date/Purpose:			
Date	Activity	Brought by	Notes (indicate if action has been brought prior)

ADDITIONAL CONTACT INFORMATION FROM DEFENDANT(S)

	Yes/No	Date	Notes
Waiver to speak with Defendant:			
Waiver to speak with HUD Counselor:			
HUD Counselor:		Telephone:	

ADDITIONAL NOTES:

Date	Note

Mortgage Foreclosure/Mechanics Lien Section

Case Manager Form

COURT USE ONLY

Date:		Cal. No.	
Call Type:	<input type="checkbox"/> CMC/Default	<input type="checkbox"/> Contested	<input type="checkbox"/> PMS

[illegible]

APPENDIX D

**CIRCUIT COURT OF COOK COUNTY MORTGAGE FORECLOSURE MEDIATION PROGRAM
COMMUNITY OUTREACH**

PROGRESS REPORT

July 1, 2010 through April 30, 2012

Prepared by The Chicago Community Trust

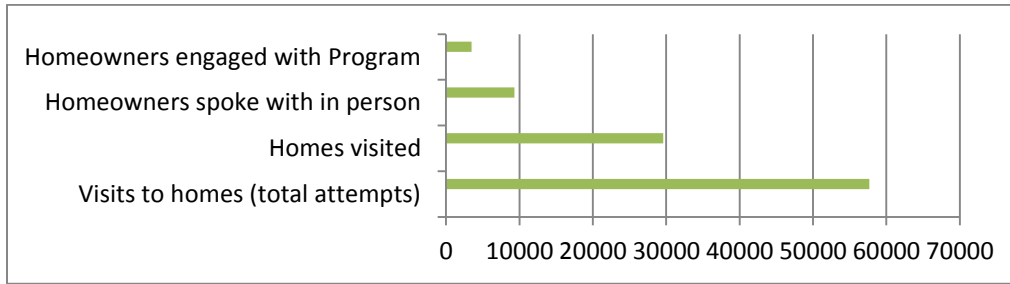
Results

In April, outreach workers from 10 organizations visited 1,236 homes. With up to three visits made to addresses that appear occupied and where a homeowner doesn't answer the door, the outreach organizations made 2,944 visits in all. Over the past 22 months, more than 29,600 homes have been visited by hardworking community-based nonprofits dedicated to getting the word about the Mediation Program.

In April, outreach workers spoke with 308 homeowners and with 86 renters. Rental properties are of course not eligible for the Mediation Program, but outreach workers provide tenant rights information. Ninety-three visited properties were vacant. When no one answers the door, outreach workers leave a packet of information about the Mediation Program, avoiding foreclosure fraud, and tenant rights. While we know that not everyone reads the materials, in some cases they can be a game changer, as this account from Interfaith Leadership Project illustrates: "We talked to a man who lost his job as a therapist after fifteen years, was unable to pay his mortgage, and is now in foreclosure. When he got the summons, he went for a consultation with an attorney who offered him a contract with a monthly fee. Before signing the contract, he received the packet of information we left at his door and he came to our office hours. At that time, we made him an appointment for the Mediation Program."

When homeowners open the door to an outreach worker, they have a brief conversation with a focused message: it is vital to keep one's court dates, the Mediation Program can offer assistance, and making an appointment for a community workshop is the first step. Workers offer to help with making an appointment by phone or online. Most homeowners agree, in conversation with an outreach worker, to call the helpline or make an online appointment. However, only those who are confirmed to have made an appointment are counted as "engaged." When limited resources require a choice to be made between outreach visits and confirmation attempts, outreach groups are asked to make visits.

Determining whether a property is vacant helps ensure that no more visits are made than necessary. Outreach organizations are creative in this assessment, as noted by Developing Communities Project in April, "Though we have been doing this for some time, consulting with community members and mailmen and women have, in many cases, helped us determine the occupancy of a property. There have been many times where the outreach team has saved time by talking to residents or became more persistent with a home that appeared vacant. "



Ancillary outreach efforts, such as mailings sent and events hosted by the outreach groups, help the public become aware of the Program, making it more likely that an outreach worker will talk with homeowners who have previously heard of the Program, and are thus more likely to trust the worker. When outreach groups hold community meetings, they provide flyers about the Mediation Program, and encourage residents to give them to neighbors they know are struggling.

Benefits of Face-to-Face Community Outreach

- Informed homeowners in foreclosure of the Mediation Program and how to enter it:
 - o 29,604 homes have been visited, and those occupied have received information on the Program via packets of information delivered at their doors;
 - o 2,701 homes were vacant or tenant-occupied – thus ineligible for the Program
 - o 9,295 homeowners have had a conversation with an outreach worker about the Program;
 - o 3,457 of those have decided to join the Program after having that conversation (and informed the outreach organization of their decision).
- Sent letters and postcards to 13,725 them to events, and or following up on a visit. Increasingly, the organizations are using selectively using mail to try to reach inaccessible homes.
- Provided additional avenues to learn about the program via 175 community events that offered 4,314 residents information about the Program.
- Connected nearly 2,900 renters, many of whom did not know their buildings were in foreclosure, to resources to help protect their rights, thus decreasing the risks of displacement and homelessness.

Homeowners' Stories from Outreach Organizations

Action Now Institute: We communicated with a homeowner who had not yet been informed that her property was in foreclosure. Through a conversation at her front door, she explained how she had fallen behind because of her son's past medical payments but is now able to recover her previous payments. We were able to take her phone number for follow up.

When we returned to the office, we were able to find her case number on the on the Clerk of Court's website and inform her of this information along with her court date. We were also able to schedule

her for a case mediation appointment. Her court date was scheduled for May 10th, and we will be following up with her after that date.

Developing Communities Project: Often when homeowners are going back and forth with their banks, they can quickly become frustrated. After visiting the home of one Roseland resident, we received a follow up phone call thanking us for stopping by and providing her with the resources. She now feels more confident in her ability to save her home.

Interfaith Housing Center of the Northern Suburbs: The Outreach Worker showed up to a house and the homeowner was in a state of panic. He was packing boxes and trying to figure out where to move. The Outreach Worker explained that he still has options and we may be able to help him find a better solution. The homeowner began to cry because he had been praying all day for a solution and she was sent to him. The Outreach Worker helped calm the homeowner down and connect him directly to a housing counselor at Interfaith Housing Center to answer some questions and help ease his burden even more. Now this homeowner wants to share our work with all his neighbors.

LUCHA: We arrived at the address of the homeowner and she opened the door and began to speak with us. We explained that we are from LUCHA and are visiting her because her home is facing foreclosure. We can see that she is pleased to speak with us. She explained that she was confused by all of the forms she had received and was not sure what to do. She also did not realize what the summons meant and how serious her risk of foreclosure was. We were able to explain the foreclosure process and the help that was available to her. As a result, she made the phone call to Cook County Mediation while we were present. The homeowner thanked us again for coming to see her and seemed grateful to speak to someone in person about the matter.

Logan Square Neighborhood Association: This month we visited a property where we were speaking with the owner. At first she was just listening but later she started speaking. She told us that she was paying a lawyer to help her with her case. She said, "I'm paying a lawyer but I don't know if he's doing his job or not." We explained about the Program and told her that it was a free program. The next day she called the office to get in the Mediation Program. She was a victim of fraud two years ago and now she's paid \$2,000 to work with a lawyer for 8 months, who has not resolved anything.

DETAILED OUTREACH REPORT CIRCUIT COURT OF COOK COUNTY – MORTGAGE FORECLOSURE MEDIATION PROGRAM Cumulative JULY 1, 2010 THRU APRIL 30, 2012	Homes visited	Visits	Homeowners spoken with	Homeowners engaged	Mailings	Events	Event partici pants
Action Now	4,546	9,576	1,088	743	128	66	729
60429, 60428, 60472, 60419, 60466, 60438, 60423, 60621, 60636 (Hazel Crest, Markham, Robbins, Dolton, Park Forest, Lansing, N Lawndale, Englewood, West Englewood)							
Developing Communities Project	548	919	180	7	0	7	76
60628, 60619, 60620, 60628, 60643, 60620, 60628, 60643 (Roseland, Pullman, West Pullman, Washington Heights)							
Genesis Housing Development Corp.	2,315	4,248	391	137	1,891	25	107
60615, 60637, 60649, 60619, 60653 (Washington Park, Hyde Park, Woodlawn, Greater Grand Crossing, South Shore, Chatham, Grand Boulevard, Kenwood, Oakland)							
Interfaith Housing Center of the Northern Suburbs	1,325	3,033	472	9	281	4	73
60201, 60202, 60025, 60026, 60053, 60714, 60022, 60076, 60077, 60091, 60093 (Evanston, Glenview, Lincolnwood, Morton Grove, Niles, Northbrook, Park Ridge, Skokie, Wilmette, Winnetka)							
Interfaith Leadership Project	2,559	5,336	1,236	349	950	23	1,486
60804, 60402 (Cicero, Berwyn, Stickney)							
Latin United Community Housing Association	474	792	60	2	445	0	0
60622, 60612, 60624, 60623, 60608 (West Town, W Garfield Park, E Garfield Park, South Lawndale, Lower W Side)							
Logan Square Neighborhood Association	1,462	2,525	337	86	1,109	0	0
60618, 60647, 60639, 60641, 60622 (Logan Square, Avondale)							
Northwest Side Housing Center	4,826	9,637	2,017	448	2,828	18	222
60630, 60634, 60641, 60639, 60707, 60618, 60651, 60622, 60647, 60624, 60612, 60016, 60018, 60004, 60005, 60068, 60056 (Portage Park, Belmont Cragin, Irving Park, Humboldt Park, Dunning, Des Plaines, Mt Prospect)							
Oak Park Regional Housing Center	2,227	3,761	321	154	2,137	2	0
606104, 60707, 60130, 60153, 60302, 60304, 60644, 60651 (Bellwood, Elmwood Park, Forest Park, Maywood, Oak Park, Austin)							
Southwest Organizing Project	4,819	9,135	2,023	1,063	0	4	60
60629, 60632, 60638, 60609, 60636, 60620, 60652, 60459, 60456, 60805, 60453 (Garfield Ridge, Archer Heights, Brighton Park, W Elsdon, Clearing, W Lawn, Chicago Lawn, Ashburn, Bedford Park, Burbank, Hometown, Evergreen Park, Oak Lawn)							
Cumulative Jul 2010 thru Oct 2011 three former grantees	4,503	8,721	1,170	459	3,956	26	1,561
TOTAL	29,604	57,683	9,295	3,457	13,725	175	4,314
		1.9		12%			
		av/home		37%			
				% per all homes visited & % of home- owners spoken with			

APPENDIX E

IN-REVIEW
Meeting of June 19, 2012
Record # 6879

OFFICE OF THE CHIEF JUDGE
JUDICIARY

PROPOSED AGREEMENT

Transmitting a Communication, dated May 30, 2012, from

TIMOTHY C. EVANS, Chief Judge, Circuit Court of Cook County

requesting authorization for Cook County to increase by \$1,227,890.00 and extend for one (1) year from August 1, 2012, through July 31, 2013, the interagency agreement with the Illinois Housing Development Authority (IHDA), Chicago, Illinois, for the management of housing counseling services for the Circuit Court of Cook County's Mortgage Foreclosure Mediation Program.

Board approved amount 03-02-10:	\$1,500,000.00
Increase approved amount 03-01-11:	500,000.00
Increase approved amount 07-12-11:	71,750.00
Increase approved amount 07-27-11:	1,650,250.00
Increase requested:	<u>1,227,890.00</u>
Adjusted amount:	\$4,749,890.00

Reason: Under this proposed extension, IHDA will maintain services developed by the court in consultation with members of the Cook County Board of Commissioners. These services include housing counseling workshops in local neighborhoods and fee-for-service arrangements for counseling agencies. Additionally, IHDA will dedicate additional housing counseling services to backlogged mediations. The extension will provide the time necessary to complete a Request for Proposals for a new agreement.

Estimated Fiscal Impact: \$1,227,890.00 (2012 - \$410,000; 2013 - \$817,890). Agreement extension: August 1, 2012, through July 31, 2013. (310-260 Account).

Approval of this item would commit Fiscal Year 2012, and Fiscal Year 2013 funds.

No lobbying contact was made for this item.

Purchase Requisition

Office of the Purchasing Agent

Cook County of Illinois

Purchase Order Number

Requisition # OC 104039 Contract # 10-41-49

Open Date

Ship To: 800046
 Judiciary - Administration
 Richard J. Daley Center
 50 W. Washington Street RM 260
 CHICAGO IL 60602-3002

Supplier: 818848
 Illinois Housing Development A
 401 N Michigan Ave Ste 70
 Chicago IL 60611

Buyer Number 724149 Supervisor 80
 Bid/Sole Src Code
 Business Unit 3100825
 Internal Req Number 23100026
 Board App Date & Item
 Requisition Date 5/31/2012
 Date Needed 5/31/2012

One Time Purchase Yes No Covers Need for months. Specific Period of time thru Prior Contract No.

Line # Commodity Description

Bal. on Hand Quantity UCM Est. Unit Cost

Extended Cost Business Unit and Object Account

Expiration Date Emergency No.

1.000 861 MISC. PROFESSIONAL SERV. INCREASE AND EXTENSION
 MORTGAGE FORECLOSURE PROGRAM
 INCREASE AND EXTENSION
 EXTENSION PERIOD REQUESTED: 08/01/2012 - 07/31/2013
 ESTIMATED FISCAL IMPACT: \$1,027,880.00
 AMOUNT ENCUMBERED: \$210,000.
 BALANCE OF \$817,880 TO FOLLOW ON SEPARATE PURCHASE ORDER
 =====
 AS PER CONTRACT # 10-41-49
 ORIGINAL AUTHORIZATION BY COUNTY BOARD: 04/06/2010
 ORIGINAL CONTRACT PERIOD: 03/15/2010 - 03/14/2011
 ORIGINAL AMOUNT AUTHORIZED: \$1,500,000.00
 AMOUNT ENCUMBERED ON PO# 172339 \$1,125,000.00
 AMOUNT ENCUMBERED ON PO# 172675 \$ 375,000.00
 =====
 INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 03/01/2011
 EXTENSION PERIOD: 03/19/2011 - 07/31/2011
 AMOUNT AUTHORIZED: \$500,000.00
 =====
 INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 07/21/2011
 EXTENSION PERIOD: 07/19/2011 - 07/31/2011
 AMOUNT AUTHORIZED: \$71,750.00

CERTIFICATION

I hereby certify that the items and/or services above are necessary to this department (or institution), and that the dept., account & activity numbers indicated above accurately reflect the specific line item budget appropriation approved by the Board of County Commissioners and that there is sufficient unencumbered balance in the department grant fund.

REQUISITIONER

BUREAU/DEPARTMENT HEAD

CCA

APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

ACCT #

DATE

BY

5-31-12

Purchase Requisition

Office of the Purchasing Agent

Cook County of Illinois

Purchase Order Number

Buyer Number 724149 Supervisor SO
 Bid/Sale Src Code
 Business Unit 3105826
 Internal Req Number 23100026
 Board App Date & Item
 Requisition Date 5/31/2012
 Date Needed 5/31/2012

Requisition # OC 104039 Contract # 10-41-49

Open Date

Slip To: 8000481
 Judiciary - Administration
 Richard J. Daley Center
 50 W. Washington Street RM 260
 CHICAGO IL 60602-3002

Supplier: 818848
 Illinois Housing Development A
 401 N Michigan Ave Ste 70
 Chicago IL 60611

Delivery Instructions:
 JAMES ANDERSON
 312.503.4555

One Time Purchase Yes No Covers Need for months. Specific Period of time that

Expiration Date Emergency No.

Line # Commodity Description

Est. Unit Cost

Quantity UOM

Extended Cost

Business Unit and Object Account

=====

INCREASE & EXTENSION

AUTHORIZED BY COUNTY BOARD: 07/27/2011

EXTENSION PERIOD: 08/01/2011 - 07/31/2012

AMOUNT AUTHORIZED: \$1,850,253.00

AMOUNT ENCUMBERED ON PC# 178126 \$477,422.00

AMOUNT ENCUMBERED ON THIS PO: \$ 1,172,828.00

=====

INTERNAL REQ# 23100026

Total of Items Ordered

219,000.00

CERTIFICATION

I hereby certify that the items and/or services above are necessary to this department (or institution) and that the dept. no., account & activity numbers indicated above accurately reflect the specific line item budget appropriation approved by the Board of County Commissioners and there is a sufficient line numbered balance in the account to grant same.

CCA

APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

ACCT #

DATE BY

REQUISITIONER

BUREAU or DEPARTMENT -HEAD

**COOK COUNTY PROCUREMENT REQUEST
IHDA INTERAGENCY AGREEMENT
CONTRACT NO. 10-41-49**

Please read and follow the instructions for completing the project checklist. All information should be completed. Attached all required materials and submit for handling to the Office of the Chief Procurement Officer, Room 1018, 118 N. Clark Street, Chicago, IL 60602

FUNDING:

<input checked="" type="checkbox"/> County	<input type="checkbox"/> General Fund	<input type="checkbox"/> Capital
<input type="checkbox"/> State	<input type="checkbox"/> IDOT	<input type="checkbox"/> MFT
<input type="checkbox"/> Federal	<input type="checkbox"/> Grant*	*Attach copy of the approved grant.

FUND NO. 3100825

SCOPE OF SERVICES OR DETAILED SPECIFICATIONS

☒ A copy of the scope of services or detailed specifications is attached.

IMPORTANT: This is a critical portion of your request. The OCPD will not be able to develop the solicitation document or a schedule for the procurement without scope or specifications. Please refer to the "Quick Reference Guide for Scope of Services and Detailed Specifications".

The Scope of Services or Specification shall include: a clear description of all anticipated services and products, including the time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable County ordinance or state/federal regulation or statute.

TYPE OF PROCUREMENT REQUESTED (check all that apply):

New Request	Change to Existing Contract
<input type="checkbox"/> Term Agreement	<input checked="" type="checkbox"/> Time Extension
<input type="checkbox"/> One-time Purchase	<input type="checkbox"/> Vendor Limit Increase
<input type="checkbox"/> Small Order	<input type="checkbox"/> Scope Change
<input type="checkbox"/> Sole Source	<input checked="" type="checkbox"/> Price Increase
<input type="checkbox"/> Emergency	<input type="checkbox"/> Additional Line Items

FORMS: ☒ Requisition ☒ Sole Source ☐ Emergency ☐ Special Approvals

Contract Period: Number of Months **12** Desired start date: **8/1/12**

PRE-BID/SUBMITTAL REQUIREMENTS:

Pre-Bid/Proposal/Submittal Conference: ☐ Yes ☒ No Site Visit: ☐ Yes ☒ No

(Please refer to the appropriate section of the Procurement Request Checklist for additional information.)

SCOPE OF SERVICES AND DETAILED SPECIFICATIONS
ILLINOIS HOUSING DEVELOPMENT AUTHORITY

Contract (Agreement) No. 10-41-49
Proposed Increase and Extension 8/1/12-7/31/13

This is an intergovernmental agreement between the Circuit Court of Cook County, the Illinois Housing Development Authority (IHDA), and Cook County. The agreement was originally drafted and approved by the Office of the State's Attorney and previous extension amendments were executed. The amendments were drafted between the Circuit Court and IHDA and approved by the State's Attorney, then delivered to Cook County Purchasing Department. This extension arrangement would be the second amendment to the Interagency Agreement.

For the proposed extension for August 1, 2012, through July 31, 2013, an amendment will be drafted to cover the following changes to the scope of services:

- Housing Counseling Services (Sections II.B, D):
 - Change: Reduce budget to \$475,000 (budget reduction of \$675,000).
 - Reason: Based on an extrapolation of trends from the previous year (8/1/11-7/31/12) the reduced budget should be sufficient to cover reimbursements for completed housing counseling files over the course of the coming year.
 - Remaining the same: IHDA to pay HUD-certified housing counseling agencies on a fee-for-service basis when a complete file is submitted and/or agreement is reached for the homeowner.
- Housing Counseling Workshops (Sections II.B.2, D):
 - Change: Reduce the budget to \$140,000 (budget cut of \$20,000).
 - Reason: Based on the workshops provided and the capacity of the housing counseling agencies, this budget will be sufficient to meet the needs of homeowners registering for workshops and requesting services from the mediation program.
 - Remaining the same: IHDA will reimburse HUD-certified housing counseling agencies on a fee-for-service basis when a housing counseling agency successfully completes administration of a workshop in their community.
- Housing Counseling Services -- Backlogged Mediation Cases (New sub-section to be added to Sections II.B, D):
 - New section: This service is new due to the continued rise in foreclosure filings and cases entering the mediation program. HUD-Certified housing counseling agencies will dedicate certain housing counselors specifically to working through the 1,200 backlogged cases that are currently awaiting mediation and coordinate with the legal aid providers and court to timely resolve the cases or see the cases through to completion of mediation. This is intended to be in effect for only one year to resolve the backlog.
 - Reason: This section will be added because experiences last year show that a combined effort of dedicated legal aid, mediators, court staff, as well as dedicated housing counselors is needed to timely and efficiently eliminate the backlog in mediations. All dedicated staff among all vendors will work together to eliminate the backlog.
- Hotline (Sections II.C, D)
 - Change: Increase budget to \$300,000.00 (budget increase of \$100,000).
 - Reason: Continued high volume of calls. The employment of additional operators is necessary to ensure that the hotline is answered at all times.
 - Remaining the same: Hotline services will remain the same and IHDA will ensure that all callers are scheduled for housing counseling or directed to the appropriate resources for assistance.
- Administrative Expenses (Section II.D)
 - Change: Reduce the budget to \$102,000 (budget reduction of \$38,250)

- Reason: Overall budget has been reduced for the coming year. This reduction necessary to keep administrative costs under 10%.

IHDA PROPOSED BUDGET FOR 8/1/2012-7/31/2013

Housing Counseling Files (950 cases at \$500 each)	\$ 475,000.00
Housing Counseling for Backlogged Mediation Cases only (salaries and benefits for 4 dedicated counselors at \$52,722.50 each to handle 1200 cases)	\$ 210,890.00
Workshops (150 a year at \$500 each +on-site intake manager at \$65,000)	\$ 140,000.00
Administrative Expenses*	\$ 102,000.00
Hotline**	\$ 300,000.00
TOTAL	\$ 1,227,890.00

Administrative Expenses*

Program Management	\$ 72,000.00
Legal/Executive	\$ 4,000.00
Information Technology	\$ 500.00
Accounting/Finance	\$ 5,000.00
Bank Fees for Payments	\$ 500.00
Rent, Utilities, Human Resources, Information Systems	\$ 20,000.00
TOTAL	\$ 102,000.00

Hotline Expenses**

Operators	\$ 118,500.00
Benefits	\$ 35,550.00
Postage	\$ 3,000.00
Printing	\$ 6,000.00
Telephone Usage	\$ 5,000.00
Computer Software (PlanPlus)	\$ 4,000.00
Office Supplies	\$ 2,500.00
Legal/Executive	\$ 7,000.00
Information Technology	\$ 3,500.00
Accounting/Finance	\$ 8,000.00
Training	\$ 5,000.00
Rent, Utilities, Human Resources, Information Systems	\$ 101,950.00
TOTAL	\$ 300,000.00

IN-REVIEW
Meeting of June 19, 2012
Record # 6880

OFFICE OF THE CHIEF JUDGE
JUDICIARY

PROPOSED CONTRACT ADDENDUM

Transmitting a Communication, dated May 30, 2012, from,

TIMOTHY C. EVANS, Chief Judge, Circuit Court of Cook County

requesting authorization for the Purchasing Agent to increase by \$700,000 and extend for one (1) year from August 1, 2012, through July 31, 2013, Contract No. 10-41-40 with the Chicago Community Trust, Chicago, Illinois, to provide community outreach services for the Circuit Court's Mortgage Foreclosure Mediation Program.

Board approved amount 03-02-10:	\$250,000.00
Increase approved amount 12-14-2010:	125,000.00
Increase approved amount 03-01-2011:	167,000.00
Increase approved amount 07-12-2011:	27,500.00
Increase approved amount 07-27-2011:	632,500.00
Increase requested:	700,000.00
Adjusted amount:	\$1,902,000.00

Reason: Under this proposed extension, the Chicago Community Trust will maintain services developed by the court in consultation with members of the Cook County Board of Commissioners. These services include face-to-face community outreach, and developing, printing, and distributing an informational folder for residents facing foreclosure. The folder consists of a process map to help residents understand each step in the foreclosure and mediation process, as well as an informational reference of court facilities. The extension will provide the time necessary to complete a Request for Proposals for a new contract.

Estimated Fiscal Impact: \$700,000.00 (2012 - \$233,333; 2013 - \$466,667). Contract extension: August 1, 2012, through July 31, 2013. (310-260 Account).

Approval of this item would commit Fiscal Year 2012, and Fiscal Year 2013 funds.

No lobbying contact was made for this item.

**COOK COUNTY PROCUREMENT REQUEST
CHICAGO COMMUNITY TRUST
CONTRACT NO. 10-41-40**

Please read and follow the instructions for completing the project checklist. All information should be completed. Attached all required materials and submit for handling to the Office of the Chief Procurement Officer, Room 1018, 118 N. Clark Street, Chicago, IL 60602

FUNDING:

<input checked="" type="checkbox"/> County	<input type="checkbox"/> General Fund	<input type="checkbox"/> Capital
<input type="checkbox"/> State	<input type="checkbox"/> IDOT	<input type="checkbox"/> MFT
<input type="checkbox"/> Federal	<input type="checkbox"/> Grant*	*Attach copy of the approved grant.

FUND NO. 3100825

SCOPE OF SERVICES OR DETAILED SPECIFICATIONS

☒ A copy of the scope of services or detailed specifications is attached.

IMPORTANT: This is a critical portion of your request. The OCPO will not be able to develop the solicitation document or a schedule for the procurement without scope or specifications. Please refer to the "Quick Reference Guide for Scope of Services and Detailed Specifications".

The Scope of Services or Specification shall include: a clear description of all anticipated services and products, including the time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable County ordinance or state/federal regulation or statute.

TYPE OF PROCUREMENT REQUESTED (check all that apply):

New Request

☐ Term Agreement
☐ One-time Purchase
☐ Small Order
☐ Sole Source
☐ Emergency

Change to Existing Contract

☒ Time Extension
☐ Vendor Limit Increase
☐ Scope Change
☒ Price Increase
☐ Additional Line Items

FORMS: ☒ Requisition ☒ Sole Source ☐ Emergency ☐ Special Approvals

Contract Period: Number of Months **12** Desired start date: **8/1/12**

PRE-BID/SUBMITTAL REQUIREMENTS:

Pre-Bid/Proposal/Submittal Conference: ☐ Yes ☒ No Site Visit: ☐ Yes ☒ No

(Please refer to the appropriate section of the Procurement Request Checklist for additional information.)

SCOPE OF SERVICES AND DETAILED SPECIFICATIONS
CHICAGO COMMUNITY TRUST

Contract No. 10-41-40

Proposed Increase and Extension 8/1/12-7/31/13

This Contract No. 10-41-40, was originally approved by the Cook County Board of Commissioners on April 20, 2010, and was subsequently extended to July 31, 2012. The contract for the Chicago Community Trust (CCT) provides for all community outreach services provided for the Circuit Court's Mortgage Foreclosure Mediation Program. These services are provided by subcontracted community outreach agencies who receive grants to provide outreach and educational services to neighborhoods throughout Cook County hardest hit by the foreclosure crisis.

The proposed extension for the period August 1, 2012, through July 31, 2013, will cover the following changes to the scope of services, Part I, Section I, Exhibit A [Special Conditions (Contract Services)], and Part I, Section V, Exhibit B (Chicago Community Trust Cook County Circuit Court Foreclosure Assistance Program Proposal):

- Face-to-Face Outreach and Informational Brochures/Folders:
 - Change: Increase the annual budget for services by 6 percent, or \$40,000.00 to \$700,000.00.
 - Reason: A continued rise in foreclosure filings and homeowners entering the mediation program have prompted a need to add additional staffing to the subcontracting agencies which provide door-to-door and other face-to-face outreach services to educate residents about the program. Additional funds are also needed to finalize an informational brochure and folder to assist homeowners as they complete each step of the mediation process. All documents must be translated into Spanish and Polish languages to ensure that homeowners can understand the resources available and how to receive help through the program. These changes are intended to increase the capacity of Chicago Community Trust and the subcontracting agencies to keep up with the high volume of foreclosures.
 - Remaining the same: All other services will remain the same during the extension period.
- Administrative Expenses:
 - Administrative expenses remain at or below 10%: \$1,300 (Less than 1%)

CHICAGO COMMUNITY TRUST
PROPOSED BUDGET FOR 8/1/2012-7/31/2013

(See also attached letter from Chicago Community Trust)

ITEMIZATION	AMOUNT	NOTES
Outreach Grants (8/1/12-7/31/13) Detail Below	\$ 641,000	
Subcontracts for Project Management & Addresses		
Alice Cottingham & Associates LLC	\$ 39,000	Subcontract for Project Management
Woodstock Institute	\$ 10,000	Provides a bi-weekly list of all addresses with newly filed foreclosure cases
Contracts Subtotal	\$ 49,000	
Training Materials		
Homeowner Education Materials (Printing)	\$ 2,000	Used by outreach workers in door-to-door outreach
Translation, design, and printing of folders	\$ 6,700	Folders for homeowners to assist in completion of each step of the process
Training honoraria	\$ 500	
Miscellaneous training or materials costs	\$ 800	
Training Materials Subtotal	\$ 10,000	
ANNUAL BUDGET TOTAL	\$ 700,000	

Outreach Grant DETAIL:

Proposed <u>8/1/12-7/31/13 Outreach Grants</u>	Current 9-month <u>grants</u>	Current grant <u>annualized</u>	Annualized grants plus 2% if grants total \$641,000 with \$700,000 from Cook County (rounded)
Community outreach			
Action Now Institute	\$52,500	\$70,000	\$71,500
Developing Communities Project	40,000	53,333	54,500
Genesis Housing Development Corporation	40,000	53,333	54,500
Interfaith Housing Center of the Northern Suburbs	52,500	70,000	71,500
Interfaith Leadership Project	40,000	53,333	56,000
Logan Square Neighborhood Association	22,500	30,000	31,000
Latin United Community Housing Association	40,000	53,333	54,500
Northwest Side Housing Center	75,000	100,000	102,000
Oak Park Regional Housing Center	45,000	60,000	61,000
Southwest Organizing Project	<u>60,000</u>	<u>80,000</u>	<u>81,500</u>
Total	467,500	623,333	638,000
Supplemental outreach			
Albany Park Neighborhood Council	<u>2,000</u>	<u>2,667</u>	<u>3,000</u>
Grand Total	\$469,500	\$626,000	\$641,000

**THE
CHICAGO
COMMUNITY
TRUST**

AND AFFILIATES

OUR REGION'S COMMUNITY FOUNDATION

**EXECUTIVE
COMMITTEE**

Frank M. Clark
Chair

Marla C. Bechly

John A. Canning, Jr.

Martin R. Castro

John H. Catlin

Shawn M. Donnelly

Judy Erwin

Michael W. Ferro, Jr.

Denise B. Gardner

Jack M. Greenberg

King W. Harris

David G. Herro

Christopher G. Kennedy

Audrey R. Peeples

Jesse H. Ruiz

Michael Tang

Terry Mazany
President & CEO

May 29, 2012

Ms. Carina Segalini

Mortgage Foreclosure Case Management Coordinator
Circuit Court of Cook County
2810-CO Richard J. Daley Center
50 W. Washington Street
Chicago, IL 60602

Dear Ms. Segalini,

Thank you for requesting a proposal from The Chicago Community Trust to extend management of the Outreach component of the Circuit Court of Cook County Mortgage Foreclosure Mediation Program for another year, beginning August 1, 2012 through July 31, 2013. The information you have requested follows.

The Chicago Community Trust (the Trust) is the Chicago region's community foundation founded in 1915 with a current asset of \$1.5 billion. The Trust connects the generosity of donors with community needs by making grants to organizations working to improve metropolitan Chicago. In 2011, the Trust, together with its donors, granted more than \$130 million to nonprofit organizations and public agencies. The mission of The Chicago Community Trust is to lead and inspire philanthropic efforts that measurably improve the quality of life and the prosperity of our region. The Trust partners with public agencies and nonprofit community organizations on a wide array of efforts, including meeting basic human needs, education, health care, arts and culture, and community development. The Trust is a nonprofit tax exempt 501(c)(3) organization. A copy of its IRS letter to this effect accompanies this proposal, as do its most recent audited financial statements and annual report.

CURRENT YEAR ARRANGEMENT

Last year the Cook County Board of Commissioners approved a total of \$660,000 for the Trust's Outreach work to cover the period from 8/2011 to 7/2012. These dollars have been allocated as:

Grants	\$584,500 (88.6%)
Contracts for project management and addresses	65,000 (9.8%)
Training and materials	<u>10,500 (1.6%)</u>
	\$660,000 (100%)

Outreach grants were awarded to the following community organizations:

- Action Now Institute - \$67,500 (August 2011 through July 2012)
- Bethel New Life - \$7,500 (August 2011 through October 2011)
- Developing Communities Project - \$40,000 (November 2011 through July 2012)
- Genesis Housing Development Corporation (in cooperation with Kenwood Oakland Community Organization)- \$50,000 (August 2011 through July 2012)
- Interfaith Housing Center of the Northern Suburbs \$52,500 (November 2011 through July 2012)
- Interfaith Leadership Project - \$52,500 (August 2011 through July 2012)
- Lakeside Community Development Corporation - \$15,000 (August 2011 through October 2011)
- Latin United Community Housing Association - \$40,000 (November 2011 through July 2012)
- Logan Square Neighborhood Association - \$30,000 (August 2011 through July 2012)
- Northwest Side Housing Center - \$100,000 (August 2011 through July 2012)
- Oak Park Regional Housing Center - \$52,500 (August 2011 through July 2012)
- Southwest Organizing Project - \$75,000 (August 2011 through July 2012)
- Albany Park Neighborhood Council \$2,000 (public education only, November 2011 through July 2012)

The two contracts are with:

- Alice Cottingham & Associates, LLC, for project management - \$55,000
- Woodstock Institute, for lists of addresses of homeowners newly in foreclosure - \$10,000

Training and materials expenses cover:

- Reprint of homeowner education materials left by outreach workers - \$2,000
- Translation, design, and printing of 12,000 pocket folders for homeowners \$6,700
- Training honoraria - \$1,000
- Miscellaneous training or materials costs - \$800

UPCOMING YEAR PROPOSAL

Assuming that the County will have \$700,000 funding available to support the Community Outreach and Education services for the period from August 1, 2012 to July 30, 2013, we would like to propose the following budget:

Grants (8/12 – 7/13)	\$641,000 (92%)
Contracts for project management and addresses	49,000 (7%)
Training and materials	10,000 (1%)
	<u>\$700,000 (100%)</u>

The proposed allocation anticipates that we will reduce the management service contract to make room for a modest increase in grant awards to community organizations. We propose to increase by 2% the annualized grant awards to the following eleven community nonprofits currently providing outreach and community education services. The specific amount recommended to each group would be:

1. Action Now Institute - \$71,500
2. Developing Communities Project - \$54,500
3. Genesis Housing Development Corporation (in cooperation with Kenwood Oakland Community Organization) - \$54,500
4. Interfaith Housing Center of the Northern Suburbs - \$71,500
5. Interfaith Leadership Project - \$54,500
6. Latin United Community Housing Association - \$54,500
7. Logan Square Neighborhood Association - \$31,000
8. Northwest Side Housing Center - \$102,000
9. Oak Park Regional Housing Center - \$61,000
10. Southwest Organizing Project - \$81,500
11. Albany Park Neighborhood Council - \$3,000 (public education only)

We arrived at the recommended grant award by annualizing the current nine-month outreach grants and providing a 2% increase to each. The attached spreadsheet provides more details for your reference. This modest increase will provide for reasonable cost increase of operating this program by the non-profit organizations. We will expect the grant recipients to be held accountable for the same deliverables under the current grant agreement.

Under this proposal, we are also recommending making grant renewals to current grantees and not issuing a new RFP. This recommendation is made based on the following factors:

- It was only last summer when The Trust issued an RFP, reviewed outreach proposals from 23 nonprofit organizations and selected the 11 current grantees.
- Performance of the current grantees has met our expectations.
- There were no close contenders that emerged from our widely circulated RFP and careful review process last summer.
- The cost of an RFP process is substantial – nearly \$9,500 in consultant fees plus uncompensated Trust staff time last year – and we believe dollars are better used for grants that support broad outreach.

We applaud the leadership of the Court in addressing the foreclosure crisis and look forward to a continued and fruitful partnership with the Court and its partners. If you need additional information, please don't hesitate to contact Juanita Irizarry, program officer (312/616-8000) or Alice Cottingham, project manager (708/609-9981). We look forward to learning the outcome of next year's funding request and hope that it will be timely to ensure that there will be no outreach service disruption.

Sincerely,

A handwritten signature in black ink, appearing to be 'T. Mazany', written over a horizontal line.

Terry Mazany
President and CEO

Enclosures:
IRS tax-exempt letter
FY10 audited financial statements
Annual report
Grants schedule

Purchase Requisition

Office of the Purchasing Agent

Cook County of Illinois

Purchase Order Number

Requisition # OC 104028 Contract # 10-41-40

Open Date

Ship To: 9000451

 Judiciary - Administration
 Richard J. Daley Center
 50 W. Washington Street RM 260
 CHICAGO IL 60602-3002

 Delivery Instructions:
 JAMES ANDERSON
 312.593.4583

 Supplier: B18586 Chicago Community Trust
 111 E Wacker Dr Ste 1400
 Chicago IL 60601

 Buyer Number 724149 Supervisor 80
 Bid/Sale Src Code
 Business Unit 3100825
 Internal Req Number 23100024
 Board App Date & Item
 Requisition Date 5/31/2012
 Date Needed 5/31/2012

One Time Purchase Yes No Covers Need for months Specific Period of time thru Prior Contract No.

Expiration Date Emergency No.

Line #	Commodity Description	Quantity	UOM	Est. Unit Cost	Extended Cost	Business Unit and Object Account
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1.000 961

MISC. PROFESSIONAL SERV. INCREASE AND EXTENSION

< > LO .0000 233.333.00 3100825 520835

FORECLOSURE MEDIATION PROGRAM

INCREASE AND EXTENSION

EXTENSION PERIOD REQUESTED: 08/01/2012 - 07/31/2013

ESTIMATED FISCAL IMPACT: \$700,000.00

AMOUNT ENCUMBERED: \$233,333.00

BALANCE OF \$433,667.00 TO FOLLOW ON SEPARATE PURCHASE ORDER

=====

AS PER CONTRACT # 0-41-40

ORIGINALLY AUTHORIZED BY COUNTY BOARD 04/08/2010

AMOUNT AUTHORIZED: \$350,000.00

CONTRACT PERIOD 03/15/2010-09/14/2010

=====

EXTENSION

AUTHORIZED BY COUNTY BOARD: 10/05/2010

EXTENSION PERIOD: 09/15/2010-12/14/2010

=====

INCREASE AND EXTENSION:

AUTHORIZED BY COUNTY BOARD: 12/14/2010

AMOUNT AUTHORIZED: \$125,000.00

EXTENSION PERIOD 12/15/2010-03/14/2011

=====

INCREASE AND EXTENSION:

AUTHORIZED BY COUNTY BOARD: 03/10/2011

CERTIFICATION

I hereby certify that the items and/or services above are necessary to this department (or institution) and that the fiscal, no, account & activity numbers indicated above accurately reflect the specific line item budget appropriation approved by the Board of Cook County Commissioners and there is a sufficient unencumbered balance in this account to grant same.

REQUISITIONER

BUREAU DEPARTMENT HEAD



APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

ACCT #

DATE

BY

Purchase Requisition

Office of the Purchasing Agent

Cook County of Illinois

Purchase Order Number

Requisition # OC 104028 Contract # 10-41-40

Ship To: 8000431
 Judiciary - Administration
 Richard J. Daley Center
 50 W. Washington Street RM 280
 CHICAGO IL 60602-3002

Supplier: 818586 Chicago Community Trust
 111 E Wacker Dr Ste 1400
 Chicago IL 60601

Buyer Number 724148 Supervisor 80
 Bid/Sole Src Code
 Business Unit 310625
 Internal Req Number 23100024
 Board App Date & Item
 Requisition Date 5/31/2012
 Date Needed 5/31/2012

One Time Purchase Yes No Covers Nec for Months Specific Period of time thru Prior Contract No.

Expiration Date Emergency No.

Line # Commodity Description

Qty on Hand

Quantity UOM

Est. Unit Cost

Extended Cost Business Unit and Object Account

INCREASE AUTHORIZED \$167,500.00
 EXTENSION PERIOD: 03/15/2011 - 07/14/2011

INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 07/21/2011.
 INCREASE AUTHORIZED: \$27,500.00

EXTENSION PERIOD: 07/15/2011 - 07/31/2011

INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 07/21/2011.
 INCREASE AUTHORIZED: \$932,500.00

EXTENSION PERIOD: 08/01/2011 - 07/31/2012

Total of Items Ordered 233,333.00

CERTIFICATION

I hereby certify that the items and amounts above are necessary to this department (or institution) and that the dollar amounts and delivery schedule indicated above accurately reflect the specific line item budget and operation approved by the Board of County Commissioners and there is sufficient unencumbered balance in the account to grant same.

REQUESTIONER

BUREAU or DEPARTMENT HEAD

CCA

APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

ACCT #

DATE

BY

IN-REVIEW
Meeting of June 19, 2012
Record # 6881

OFFICE OF THE CHIEF JUDGE
JUDICIARY

PROPOSED CONTRACT ADDENDUM

Transmitting a Communication, dated May 30, 2012, from,

TIMOTHY C. EVANS, Chief Judge, Circuit Court of Cook County

requesting authorization for the Purchasing Agent to increase by \$1,578,667.00 and extend for one (1) year from August 1, 2012, through July 31, 2013, Contract No. 10-41-33 with the Chicago Bar Foundation, Chicago, Illinois, to provide legal aid and mediation services for the Circuit Court's Mortgage Foreclosure Mediation Program.

Board approved amount 03-02-10:	\$ 600,713.00
Increase approved amount 10-05-2010:	120,595.00
Increase approved amount 12-14-2010:	241,185.00
Increase approved amount 03-01-2011:	321,580.00
Increase approved amount 07-12-2011:	53,170.00
Increase approved amount 07-27-2011:	1,223,807.00
Increase requested:	<u>1,578,667.00</u>
Adjusted amount:	\$4,139,717.00

Reason: Under this proposed extension, the Chicago Bar Foundation will maintain services developed by the court in consultation with members of the Cook County Board of Commissioners. These services include adding additional staff attorneys and support staff to increase capacity, to continue improving communications and information flow among program service providers, as well as ensuring timely services provided to litigants. A one year extension will provide the time necessary to complete a Request for Proposals for a new contract.

Estimated Fiscal Impact: \$1,578,667.00 (2012 - \$527,000; 2013 - \$1,051,667). Contract extension: August 1, 2012, through July 31, 2013. (310-260 Account).

Approval of this item would commit Fiscal Year 2012, and Fiscal Year 2013 funds.

No lobbying contact was made for this item.

**COOK COUNTY PROCUREMENT REQUEST
CHICAGO BAR FOUNDATION
CONTRACT NO. 10-41-33**

Please read and follow the instructions for completing the project checklist. All information should be completed. Attached all required materials and submit for handling to the Office of the Chief Procurement Officer, Room 1018, 118 N. Clark Street, Chicago, IL 60602

FUNDING:

<input checked="" type="checkbox"/> County	<input type="checkbox"/> General Fund	<input type="checkbox"/> Capital
<input type="checkbox"/> State	<input type="checkbox"/> IDOT	<input type="checkbox"/> MFT
<input type="checkbox"/> Federal	<input type="checkbox"/> Grant*	*Attach copy of the approved grant.

FUND NO. 3100825

SCOPE OF SERVICES OR DETAILED SPECIFICATIONS

☒ A copy of the scope of services or detailed specifications is attached.

IMPORTANT: This is a critical portion of your request. The OCPO will not be able to develop the solicitation document or a schedule for the procurement without scope or specifications. Please refer to the "Quick Reference Guide for Scope of Services and Detailed Specifications".

The Scope of Services or Specification shall include: a clear description of all anticipated services and products, including the time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable County ordinance or state/federal regulation or statute.

TYPE OF PROCUREMENT REQUESTED (check all that apply):

New Request	Change to Existing Contract
<input type="checkbox"/> Term Agreement	<input checked="" type="checkbox"/> Time Extension
<input type="checkbox"/> One-time Purchase	<input type="checkbox"/> Vendor Limit Increase
<input type="checkbox"/> Small Order	<input type="checkbox"/> Scope Change
<input type="checkbox"/> Sole Source	<input checked="" type="checkbox"/> Price Increase
<input type="checkbox"/> Emergency	<input type="checkbox"/> Additional Line Items

FORMS: ☒ Requisition ☒ Sole Source ☐ Emergency ☐ Special Approvals

Contract Period: Number of Months **12** Desired start date: **8/1/12**

PRE-BID/SUBMITTAL REQUIREMENTS:

Pre-Bid/Proposal/Submittal Conference: ☐ Yes ☒ No Site Visit: ☐ Yes ☒ No

(Please refer to the appropriate section of the Procurement Request Checklist for additional information.)

SCOPE OF SERVICES AND DETAILED SPECIFICATIONS
CHICAGO BAR FOUNDATION

Contract No. 10-41-33

Proposed Increase and Extension 8/1/12-7/31/13

Contract No. 10-41-33 with the Chicago Bar Foundation was originally approved by the Cook County Board of Commissioners on April 6, 2010, subsequently extended to July 31, 2012. The contract covers legal aid and mediation services provided through the Mortgage Foreclosure Mediation Program. These services are provided by three agencies as subcontractors: The Chicago Legal Clinic (CLC), Chicago Volunteer Legal Services (CVLS), and the Center for Conflict Resolution (CCR). The agencies provide in-court legal aid, legal representation at mediation sessions, and mediator services, respectively, at no cost to the homeowner.

The proposed extension for the period August 1, 2012, through July 31, 2013, will cover the following changes to the scope of services, Part I, Section I, Exhibit A (Special Conditions for the Chicago Bar Foundation Foreclosure Assistance Services to Cook County Circuit Court):

- Legal Representation at Mediation Sessions (Chicago Volunteer Legal Services):
 - Change: Increase total budget for services by CVLS to \$739,063 (budget increase of \$279,634).
 - Reason: A continued rise in foreclosure filings and homeowners entering the mediation program have prompted a need to add additional staffing for backlogged mediation cases while continuing to address newly referred cases in a timely manner. The increase to the CVLS annual budget will fund two (2) contract attorneys (no benefits) and three (3) paralegals (salary plus benefits and fringe costs). These changes are intended to increase the capacity of CVLS to keep up with and handle the high volume of foreclosures.
 - Remaining the same: All other services will remain the same.
- Legal Aid Services In-Court (Chicago Legal Clinic):
 - No Change: Annual budget remains the same as last year at \$427,200.
- Mediation Services (Center for Conflict Resolution):
 - No Change: Annual budget remains the same as last year at \$412,404.
- Administrative Expenses:
 - Administrative Expenses for overhead remains at or below 10%:
 - Chicago Bar Foundation: \$0 – No Administrative Expense,
 - CVLS: \$48,410 (7%, reduced from 8.8%),
 - CLC: \$25,185 (6.2%, same as prior year),
 - CCR: \$24,606 (6.3%, same as prior year).

CHICAGO VOLUNTEER LEGAL SERVICES (CVLS) PROPOSED BUDGET

Chicago Volunteer Legal Services Foundation

Staff Salary - Benefits - Overhead

Mediation Program

Prepared for The Chicago Bar Foundation

August 1, 2012 through July 31, 2013

Budget Item	Annualized Budget
Program Director (25%) - Nelson, Patricia M.	\$24,098
Mediation Supervisor (100%) - Sutton, Eric A.	60,000
Staff Attorney (100%) - Fischer, Allegra C.	56,100
Staff Attorney (100%) - Griffith, Ashley L.	56,100
Staff Attorney (100%) - Lindsay, Keri R.	56,100
Contract Attorney (100%)	41,600
Contract Attorney (100%)	41,600
Admin. Assist./Paralegal (100%) - Santrella, Daniel P.	40,800
Admin. Assist./Paralegal (100%) - Maliawco, Matthew G.	40,800
Paralegal	36,200
Paralegal	36,200
Paralegal	36,200
Salary total	525,798
Payroll Taxes	38,537
Health & Life Insurance	96,319
Additional Space and Equipment	30,000
Overhead	48,410
TOTAL	\$739,063

NOTE: The additional space and equipment line is a very conservative estimate of the added costs for additional facilities such as office space, computers and telephones, an additional copier/scanner that will be needed for additional staff.

CHICAGO LEGAL CLINIC (CLC) PROPOSED BUDGET

**Chicago Legal Clinic
Staff Salary - Benefits - Overhead
Mediation Program
Prepared for The Chicago Bar Foundation
August 1, 2012 through July 31, 2013**

<u>Expenses</u>	<u>Monthly Budget</u>	<u>Annual Budget - 8/1/12 to 7/31/13</u>
Salary: Marcelino Garcia	\$4,166.66	\$50,000.00
Salary: Delmar Vouziers Flynn	\$4,000.00	\$48,000.00
Salary: Jamie Davis	\$4,000.00	\$48,000.00
Salary: Chris Haddad Scanlon	\$3,916.66	\$47,000.00
Salary: Avani Kamdar	\$3,958.32	\$47,500.00
Salary: Cinthya L. Bassig	\$3,833.32	\$46,000.00
 Salary: Joseph Tomino	 \$2,333.33	 \$28,000.00
Employee Benefits	\$5,183.33	\$62,200.00
Program Supplies, Books & Publications, etc. (vast majority of training materials provided via Internet)	\$115.00	\$1,380.00
Other Office Supplies & Equipment	\$320.00	\$3,840.00
Non Personnel IT Costs (Consulting & Technical Assistance 5% of Clinic total of \$12,000)	\$385.00	\$4,620.00
Continuing Education (\$250 per year per employee)	\$0.00	
Telecommunications	\$0.00	
Training	\$0.00	
Other (Travel & Parking \$50/month/employee) (Postage for client questionnaires, etc. \$500/year) (Miscellaneous \$300/year)	\$1,289.56	\$15,475.00
Indirect Program Costs/Overhead (Accounting, Auditing, Dues & Professional Liability Insurance)	\$2,098.82	\$25,185.00
 TOTALS	 \$35,600.00	 \$427,200.00

CENTER FOR CONFLICT RESOLUTION (CCR) PROPOSED BUDGET

Staff Salary - Benefits - Overhead

Mediation Program

Prepared for The Chicago Bar Foundation

August 1, 2012 through July 31, 2013

		12 month budget	
Direct Costs	PERSONNEL		
	STAFF CCR Mediation Program Director		
	Salary	\$	55,000.00
	Fica (7.65% of salary)	\$	4,207.50
	Benefits (medical)	\$	5,942.76
	(dental)	\$	507.48
	(life)	\$	42.00
	(vision)	\$	50.28
	(workers Comp)	\$	138.00
	(401(k) match)	\$	500.00
	Subtotal	\$	66,388.02
	Case Manager		
	Salary	\$	38,000.00
	Fica (7.65% of salary)	\$	2,907.00
	Benefits (medical)	\$	5,942.76
	(dental)	\$	507.48
	(life)	\$	42.00
	(vision)	\$	50.28
	(workers Comp)	\$	138.00
	(401(k) match)	\$	500.00
	Subtotal	\$	48,087.52
	Case Manager	\$	35,000.00
	Fica (7.65% of salary)	\$	2,677.50
	Benefits (medical)	\$	5,942.76
	(dental)	\$	507.48
	(life)	\$	42.00
	(vision)	\$	50.28
	(workers Comp)	\$	138.00
	(401(k) match)	\$	500.00
	Subtotal	\$	44,858.02
	Case Manager – FTE Ind. Contractor	\$	30,058.90
	10% of CCR Executive Director Time		
	Salary	\$	10,000.00
	Fica (7.65% of salary)	\$	765.00
	Benefits (medical)	\$	594.28
	(dental)	\$	50.75
	(life)	\$	4.20
	(vision)	\$	5.03
	(workers Comp)	\$	13.80
	(401(k) match)	\$	50.00
	Subtotal	\$	11,483.05
	10% of CCR Volunteer Director Time		
	Salary	\$	4,589.00
	Fica (7.65% of salary)	\$	351.06

Benefits (medical)	\$	594.28
(dental)	\$	50.75
(life)	\$	4.20
(vision)	\$	5.03
(workers Comp)	\$	13.80
(401(k) match)	\$	50.00
Subtotal	\$	<u>5,658.11</u>

Staff Salary Subtotal \$ 206,533.62

PROGRAM & OVERHEAD EXPENSES

Training/Volunteer Development	\$	5,000.00
Accounting and Audit	\$	6,164.38
Computer equipment, database, maintenance, repair and technical support	\$	10,000.00
Office Supplies	\$	1,750.00
Telephone, Fax and Internet Access	\$	2,500.00
Insurance	\$	1,750.00
Dues	\$	200.00
Postage	\$	150.00
Printing/Copying in-house	\$	3,750.00
Occupancy	\$	24,000.00
Utilities	\$	<u>606.00</u>

PROGRAM & OVERHEAD SUBTOTAL: \$ 55,870.38

EXPENSES TOTAL: \$ 262,404.00

Mediation services, 50 weeks of mediation/year

With 30 paid mediations/week @ \$100/mediation **\$ 150,000.00**

BUDGET TOTAL \$ 412,404.00

Purchase Requisition Office of the Purchasing Agent Cook County of Illinois

Purchase Order Number

Requisition # OC 104037 Contract # 10-41-33

Open Date

Ship To: 8000461
Judiciary - Administration
Richard J. Daley Center
50 W. Washington Street RM 280
CHICAGO IL 60602-3002

Supplier: 760037
Chicago Bar Foundation The
321 S Plymouth Ct #505
Chicago IL 60604

Buyer Number 724149 Supervisor 80
Bid/Sole Src Code
Business Unit 3100825
Internal Req Number 23100025
Board App Date & Item 5/31/2012
Requisition Date 5/31/2012
Date Needed

One Time Purchase Yes No Covers Need for months. Specific Period of time thru

Expiration Date

Emergency No.

Line #

Commodity Description

Prior Contract No.

Quantity

UDM

Est. Unit Cost

Extended Cost

Business Unit and Object Account

1.000 931

MISC. PROFESSIONAL SERV.

INCREASE AND EXTENSION

LO

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527,000.00

3100825.520835

MORTGAGE FORECLOSURE PROGRAM

INCREASE AND EXTENSION

EXTENSION PERIOD REQUESTED: 06/01/2012 - 07/31/2013

ESTIMATED FISCAL IMPACT: \$1,578,997.00

AMOUNT ENCUMBERED: \$ 527,000.00

BALANCE OF \$1,051,997.00 TO FOLLOW ON SEPERATE PURCHASE ORDER

AS PER CONTRACT 10-41-33

ORIGINALLY AUTHORIZED BY COUNTY BOARD 03/02/2010

AMOUNT AUTHORIZED \$900,713.00

CONTRACT PERIOD: 03/14/2010 - 05/14/2010

AMOUNT ENCUMBERED PO# 172210 \$399,843.00

AMOUNT ENCUMBERED PO# 172214 \$200,870.00

INCREASE AND EXTENSION

AUTHORIZED BY COUNTY BOARD: 10/05/2010

EXTENSION PERIOD: 03/15/2010 - 12/14/2010

INCREASE AMOUNT AUTHORIZED: \$120,595.00

AMOUNT ENCUMBERED PO# 174450 \$80,395.00

AMOUNT ENCUMBERED PO# 174440 \$40,000.00

INCREASE AND EXTENSION

AUTHORIZED BY COUNTY BOARD: 12/14/2010

CERTIFICATION

I hereby certify that the items and/or services shown are necessary to this department (or institution) and that the dept. no., account & object code entered above accurately reflect the specification item budget appropriation approved by the Board of County Commissioners and there is a sufficient unencumbered balance in this account to permit sale.

REQUISITIONER

BUREAU or DEPARTMENT HEAD

6/1/12

CCA

APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

ACCT #

DATE

BY

Purchase Requisition

Office of the Purchasing Agent

Cook County of Illinois

Purchase Order Number

Requisition # OC 104037 Contract # 10-41-33 Open Date

 Ship To: 8000461 Judiciary - Administration
 Richard J. Daley Center
 50 W. Washington Street RM 260
 CHICAGO IL 60602-3002

 Supplier: 780037 Chicago Bar Foundation The
 321 S Plymouth Ct #1805
 Chicago IL 60604

 Buyer Number 724149 Supervisor 80
 Bid/Sole Src Code
 Business Unit 3100825
 Internal Req Number 23100025
 Board App Date & Item 5/31/2012
 Requisition Date 5/31/2012
 Date Needed 5/31/2012

One Time Purchase Yes No Covers Need for months Specific Period of time thru Prior Contract No.

Line #	Commodity Description	Quantity	UOM	Est. Unit Cost	Extended Cost	Business Unit and Object Account
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 EXTENSION PERIOD: 12/15/2010 - 03/14/2011
 INCREASE AMOUNT AUTHORIZED: \$241,165.00

 INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 03/01/2011
 EXTENSION PERIOD: 03/15/2011 - 07/14/2011
 INCREASE AMOUNT AUTHORIZED: \$321,589.00
 AMOUNT ENCUMBERED ON PO# 176650: \$321,589.00

 INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 07/12/2011
 EXTENSION PERIOD: 07/15/2011 - 07/31/2011
 INCREASE AMOUNT AUTHORIZED: \$53,170.00
 AMOUNT ENCUMBERED ON PO# 176650: \$53,170.00

 INCREASE AND EXTENSION
 AUTHORIZED BY COUNTY BOARD: 07/27/2011
 EXTENSION PERIOD: 08/01/2011 - 07/31/2012
 INCREASE AMOUNT AUTHORIZED: \$1,223,807.00
 AMOUNT ENCUMBERED ON THIS PO# 178123: \$416,982.00
 AMOUNT ENCUMBERED ON THIS PO \$805,845.00

INTERNAL REQ # 23100025

Total of Items Ordered

\$27,000.00

COA

APPROVED BUDGETARY ACCOUNT

PURCHASING USE ONLY

CERTIFICATION

I hereby certify that the items and/or services above are necessary to this department (or institution) and that the dept. no., account & activity numbers indicated above accurately reflect the specific line item budget appropriation approved by the Board of County Commissioners and there is a sufficient unencumbered balance in the account to grant same.

ACCT #

DATE BY

REQUISITIONER BUREAU or DEPARTMENT HEAD