



The Jewish Federations®
OF NORTH AMERICA

Center for Advancing
Holocaust Survivor Care

Center for Advancing Holocaust Survivor Care

Request for Proposals and Program Guidelines

*Innovations in Person-Centered, Trauma-Informed Supportive Services for
Holocaust Survivors*

Issued 2018

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Section 1: Overview

The Jewish Federations of North America (JFNA) has received a grant from the U.S. Administration for Community Living/Administration on Aging (ACL/AoA) to advance *Person-Centered, Trauma-Informed (PCTI)* supportive services for Holocaust survivors in the United States. This program is implemented with strong cooperation from the Network of Jewish Human Service Agencies and the Conference on Jewish Material Claims Against Germany (Claims Conference). JFNA uses its grant and funds raised through philanthropy to award subgrants for local PCTI innovations for Holocaust survivors and to build national capacity to provide PCTI-based services to Holocaust survivors. Subgrantees earn recognition as leaders in Holocaust survivor supportive services and trauma-informed care.

JFNA's Center for Advancing Holocaust Survivor Care seeks proposals for the expansion of PCTI services for Holocaust survivors throughout the United States.

PCTI care is a holistic approach to service provision that promotes the dignity, strength, and empowerment of trauma victims by incorporating knowledge about the role of trauma in victims' lives into organization programs, policies, and procedures. JFNA is interested in programs that serve Holocaust survivors while promoting PCTI care for all older adults. Resources about trauma-informed care can be found in the following links:

- National Center for Trauma-Informed Care and Alternatives to Seclusion and Restraint at <http://www.samhsa.gov/nctic/trauma-interventions>
- Substance Abuse and Mental Health Services Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach at <http://store.samhsa.gov/shin/content/SMA14-4884/SMA14-4884.pdf>
- The Administration for Children & Families' Resource Guide to Trauma-Informed Services at <https://www.acf.hhs.gov/trauma-toolkit>
- ACL Guidance to the Aging Services Network: Outreach and Service Provision to Holocaust survivors at <https://www.acl.gov/sites/default/files/about-acl/2017-04/FINAL%20FOR%20POSTING%20-%20ACL%20Guidance%20-%20Holocaust%20Survivor%20Services%20-%201-12-17.pdf>
- Center for Health Care Strategies Key Ingredients for Successful Trauma-Informed Care Implementation at <https://www.chcs.org/media/ATC-whitepaper-040616-rev.pdf>

JFNA encourages proposals that incorporate partners at the core of the PCTI program. Partnerships can provide expertise in multiple fields, such as aging or trauma, expanding organizations' capacities to serve Holocaust survivors and other older adults who have experienced trauma.

JFNA intends to fund subgrantees for two years, dependent upon compliance with all program requirements, the success of the subgrantee's program, and the availability of

federal funds. Federal funds are not secured for the second year of this cycle. The intent is for proposals that receive funding in the first year of this grant cycle to receive funding in the second year at half of the initial funding level.

This is the fourth RFP cycle under JFNA's grant. New subgrantees will comprise the "Delta Cohort."

The application process consists of two stages. Stage 1 includes a Questionnaire, Budget, Budget Narrative, and Work Plan. An independent Review Committee will award points for each component. Applicants that advance to Stage 2 will be required to submit additional materials. JFNA anticipates announcing awards by the end of January 2019 to coincide with International Holocaust Remembrance Day.

Section 2: Application Process and Logistics

A. Eligibility

To be eligible for funding, applicants must be:

- Classified as a 501(c)(3) by the Internal Revenue Service or a religious institution;
- A direct service provider to older adults;
- An entity with at least one audit report;
- Based in the U.S.;
- Registered in SAM and have a DUNS number by the time funding is disbursed.

Agencies that do not currently receive grant funding from the Conference on Jewish Material Claims Against Germany (Claims Conference) are still eligible for this program and are encouraged to apply.

Funding may not be used for:

- Medical or institutional care, income maintenance, cash assistance, or gift cards
- Grants to individuals
- Services to treat secondary trauma if the client is not currently a family or informal caregiver currently to a Holocaust survivor
- Attendance at conferences or professional development activities unrelated to this JFNA-funded program, unless it is in the capacity as a presenter about a JFNA funded program
- Non-social service programs (e.g. recording survivor testimony for the sole benefit of the community)
- Programs that only consist of a needs assessment. If the needs assessment is part of a larger program, it is allowable.
- The production of materials or tools to be licensed or sold
- Religious Instruction
- Endowments, capital campaigns, fundraising

- Publication subsidies and advertising costs for general organization operations unrelated to this program
- Lobbying or political activities
- Basic research (e.g., scientific or medical experiments)
- Construction or rehabilitation of buildings
- Equipment purchases, unless such equipment is demonstrated to be necessary to carry out an activity otherwise fundable under Title IV of the Older Americans Act (Equipment purchases including, but not limited to, emergency response systems, iPads, or grab bars, are allowable provided they are tied to the intent of this grant)

For Current or Previous JFNA Subgrantees:

There is a special section of this application for current subgrantees.

JFNA subgrantees are eligible to apply for a new subgrant through this RFP.

If the JFNA subgrantee is part of the Alpha Cohort (Program Year 1 that began March 1, 2016), or Bravo Cohort (Program Year 1 that began March 1, 2017) there are three options:

- a. Propose an entirely new PCTI innovation, or
- b. Deepen and further innovate upon the previous JFNA funded program, or
- c. A combination of the above.

For an Alpha or Bravo subgrantee program to be funded again (option b or c), the applicant must describe a new approach, innovation, or enhancement to the existing funded program. The proposal must promote the program's sustainability and dissemination throughout the field. It must take what the original program accomplished, elevate it and more thoroughly integrate it into the field. Replication guides or toolkits can further advance the practice. Program proposals that do not promote dissemination and sustainability will not be funded. If a proposal seeks to continue a program with no additional innovation, even if it serves more people, it will not be funded. The aim is for successful programs to be sustainable and replicable. In proposals using option c, applications must clearly state in the Questionnaire the parts of the proposal are new and which parts constitute a deepening or further innovation of the program. Only the strongest applications that demonstrate either a new approach or build on previous successful work will be funded. Alpha subgrantees that wish to deepen or resuscitate a previously funded Alpha program may apply to do so.

If the current JFNA subgrantee is part of the Charlie Cohort (Program Year 1 that began March 1, 2018), any new proposal must be for programming that is new to the organization and different from the organization's existing programs. Applicants may not duplicate or extend their Charlie programs through this RFP.

This will be a competitive application process. When evaluating new proposals from a current or previous subgrantee, the success of JFNA-funded programs will be considered, as will the success of the subgrantee in its compliance and timely completion of all subgrant requirements.

For Sub-subgrantee Partnership Applications:

There is a special section of this application for proposals involving sub-subgrantee partnerships. JFNA encourages the development of sub-subgrantee partnerships, including programs that strengthen service delivery or serve Holocaust survivors while providing PCTI care to other older adult populations who have experienced trauma. Sub-subgrantee partnerships can create innovative programming and disseminate PCTI practices to organizations that have limited experience working with Holocaust survivors.

For the purposes of this grant, JFNA is the grantee of the federal government. Organizations that receive grants from JFNA are *subgrantees*. Organizations that receive support from subgrantees are *sub-subgrantees*. If a relationship between two or more organizations is required for a program or activity to take place, that relationship would be defined as a sub-subgrantee partnership.

Sub-subgrantee partnership applications will receive an extra 20 points added to the total points earned (not percentage points).

In a sub-subgrantee partnership application, the lead for the program is the subgrantee. This organization applies on behalf of the other partner(s), the sub-subgrantee(s). The subgrantee is responsible for controlling the funds. It is permissible for the subgrantee to pay or reimburse the sub-subgrantee for staff salaries and program activities. However, the subgrantee may not make general allocations to the sub-subgrantee under this grant. **An organization may only apply for this grant through one application per year, and cannot submit an application for itself and be part of a separate sub-subgrantee partnership application.**

As an example, if the subgrantee partners with an organization that specializes in providing art therapy to develop PCTI-infused art therapy classes for Holocaust survivors, this relationship would be a sub-subgrantee relationship, because the program proposed by the applicant would not be possible without the partner.

Auxiliary services, such as transportation to a program - or an exchange of space, materials, volunteers or other auxiliary services, would be classified as a contractor relationship and does not require completion of the sub-subgrantee section of this application. While a sub-subgrantee partnership can aid in sharing information about PCTI care, this knowledge can also be shared without a formal sub-subgrantee relationship.

The relationship between the subgrantee and the sub-subgrantee must be stated clearly in the application. If the sub-subgrantee partnership application advances to Stage 2 of the application process, at that time the sub-subgrantee(s) will be required to submit letters confirming their participation in the proposed program.

B. Important Dates

The submission of an Intent to Apply is required for all applicants and is due by **July 16, 2018, at 11:59 pm ET**. The deadline for grant applications is **August 27, 2018, at 11:59 pm ET**.

Two (2) optional informational conference calls, with the same content, will be held for interested parties. The calls will be recorded and posted to the Center's website.

June 28, 2018, 3:30 pm ET
July 9, 2018, 1:00 pm ET
Phone number: (605) 472-5225
Passcode: 488673#
RSVP: www.HolocaustSurvivorCare.org

Please note the following timeline:

- June 26, 2018: Application available online
- June 28, 2018, 3:30 pm ET: Conference Call 1
- July 9, 2018, 1:00 pm ET: Conference Call 2
- July 16, 2018, 11:59 pm ET: Online submission of required "Intent to Apply" due
- August 27, 2018, 11:59 pm ET: Stage 1 Applications due
- November 8, 2018: Notification to applicants that advanced to Stage 2
- December 7, 2018, 12:00 pm ET: Stage 2 Application due for proposals that advance
- January 31, 2019: Anticipated date for award announcements
- March 1, 2019: Implementation Begins

C. Priority Populations and Service Categories

I. Innovation

Programming supported by this grant must include innovative methods of delivering PCTI care to Holocaust survivors. This includes incorporating new programming, new methods, or a new focus on an under-served Holocaust survivor population into an existing innovative program. **JFNA will not fund an outright continuation of an existing program.**

Programs can be innovative for the field, organization, or program. What is innovative for one organization might not be innovative for another.

II. Populations

The definition of Jewish Nazi victim used by the Claims Conference and the German Government is an acceptable definition for Holocaust survivors under this grant, but there could be others. The U.S. Government does not limit funding to the German Government's definition; however, individuals born after the end of February 1946 are not considered Holocaust survivors under this grant.

Proposals relating to the following populations are encouraged:

- *Holocaust survivors living in poverty.* The Older Americans Act, through which this grant is funded, does not permit an income/asset test; however, the expectation is for services to be provided to the most economically vulnerable Holocaust survivors, as determined by the subgrantee.
- *Holocaust survivors from the Former Soviet Union (FSU).* This category refers to those who were persecuted by the Nazis during the time of the Holocaust or fled territory that was subsequently occupied by the Nazis, regardless of whether they were born in the FSU or fled to the FSU, and regardless of whether they self-identify as Holocaust survivors. This grant is not intended for Russian Jews born after the Holocaust.
- *Holocaust survivors from Orthodox Jewish communities.* This vulnerable population faces challenges in accessing public social services and is encouraged to be assisted through this grant.
- *Holocaust survivors who are particularly vulnerable or isolated.* Several factors can increase vulnerability and isolation, such as living far from family, friends and other support; dealing with natural or man-made disasters; advanced or chronic illness; or age-related cognitive impairment.
- *Family or friend caregivers of Holocaust survivors.* Family members or friends of Holocaust survivors may be served if they are currently caregivers to a Holocaust survivor. The services must be intended to support their role as caregivers.

III. Service Categories

Applications are sought for a diverse array of services. Services listed in each category are examples and are not intended to be an exhaustive list of programmatic possibilities.

Categories and examples:

- Physical health: Services designed to promote the physical health and well-being of Holocaust survivors, which may include wellness programs, meals, falls-prevention, chronic disease management, medication management, and health education and training programs. Projected outcomes may include improved self-reported health and well-being, decreased risk for falls, increased understanding of self-care strategies, and improved nutritional intake.
- Mental health: Services designed to promote mental, emotional, and spiritual health of Holocaust survivors. Services may include individual and group counseling, support groups, socialization programs, creative arts programs, pet therapy, and education and training programs. Projected outcomes may include reported decrease in depression, anxiety, and feelings of loneliness and/or isolation. Additional goals may include improving cognitive health, related to memory loss or dementia.
- Access to Community Living: Services designed to promote safety or aging in place, such as access to: social services, information and referral, case management, transportation, legal assistance, benefits counseling and eligibility assistance, opportunities to volunteer, minor home repair and maintenance, help addressing hoarding, defense against financial abuse and scams, and financial planning. Outreach may be funded as part of the project to assist in program success. Projected outcomes may include increased understanding and utilization of available social services, acquisition of benefits, increased understanding and utilization of legal documents and protocols, and improved financial security.
- Family caregiving: Services designed to promote the physical, emotional, and financial health of family members and friends who currently provide assistance, care, and support to Holocaust survivors. Services in this area may include caregiver assessment, counseling and support groups, information and referral, case management, education and training, and respite. Projected outcomes may include improved self-reported health and well-being, a strengthened support system, increased understanding of self-care strategies, increased understanding of healthy caregiving strategies, and decreased feelings of anxiety, stress, and isolation.
- PCTI training: Training programs designed to improve PCTI care to Holocaust survivors and all vulnerable clients by training those with whom the client comes in contact. Participants may include, but are not limited to, professional and

family caregivers, case managers, social workers, other support staff, doctors and nurses in the community and in hospitals, community partner professionals, volunteers, drivers, and board members. This training is not intended for Holocaust survivors. Projected outcomes may include increased awareness about the impact of trauma on survivors, increased understanding of how to provide trauma-informed care, increased organization and community awareness of trauma-informed principles, and improved client care.

- Programs New to the JFNA Grant or Programs that can Leverage other Recourses: The following program ideas will receive an extra 20 points added to the total points earned (not percentage points): engaging Holocaust survivors as volunteers; serving Holocaust survivors who have been impacted by natural or man-made disasters (hazards caused by human action or inaction) or who live in disaster-prone areas; programs involving PCTI infused case management, legal assistance, or benefits counseling; or PCTI programs involving home safety.

Funds awarded by JFNA are mostly comprised of federal funds and are considered government grant dollars. If used for home care hours, these funds will count as government-funded home care hours. If a survivor also receives home care funded by the Claims Conference, then these JFNA/government-funded home care hours must be reported to the Claims Conference. If JFNA funds are to be used for home care hours for a survivor that also receives home care hours funded by the Claims Conference, the application must justify the additional need.

D. Funding

I. Award Amounts

JFNA will award grants of \$20,000 to \$400,000.

All awards include money from the federal grant and JFNA's national fundraising efforts. This RFP process will be competitive. Not all proposals will receive the full amount requested. Please plan proposal budgets and programs accordingly.

II. Match Requirements

All subgrantees are required to contribute matching resources equal to **25% of the total program budget**. For example, an organization applying for a subgrant of \$120,000 will be expected to contribute \$40,000 in matching resources, bringing the total program budget to \$160,000. Calculate required match as follows:

$$\text{JFNA Funds Requested} / 3 = \text{Required Match}$$

The match is required by the federal government to contribute to the sustainability of the proposed program. Matching resources take on the characteristics of the JFNA funds, and are therefore subject to the same rules regarding their use. The match may be comprised of cash, in-kind resources, or a combination of both.

Subject to availability of federal funds and compliance with all requirements, the intent is for the Delta Cohort to receive funding in Program Year 1 (March 1, 2019-February 28, 2020) to also receive funding in Program Year 2 (March 1, 2020-February 28, 2021) at half the funding level. Agencies are responsible for raising matching funds in both Year 1 and Year 2. **The match requirement for Year 2 of the subgrant is dollar-for-dollar the same amount as required in Year 1. For example, if the subgrantee's match requirement is \$40,000 in Year 1, the subgrantee is also responsible for a \$40,000 match in Year 2, although the JFNA funding amount will decrease by 50% in the second year.**

The applicant's proposal must detail where matching resources are expected to come from. Possible sources of the match may include, but are not limited to:

- In-Kind Contributions
- Organization Support
- Jewish Federation grants
- State government grants
- Local government grants
- Foundation grants
- Individual contributions

The following resources **cannot** be used toward the JFNA/federal match:

- Federal funds
- Claims Conference grant funds
- Funds used to meet the Claims Conference's required match
- Funds used to match other grants

Subgrantees must demonstrate to JFNA receipt of all cash match funds for the first year of the grant by August 31, 2019, in addition to a specific plan for the commitment of all future in-kind donations. **If subgrantees cannot raise the required matching funds by August 31, 2019, funding for program Year 2 may be in jeopardy.**

Overmatch

If a subgrantee raises more money than is required by the match obligation, the resulting funds are termed "Overmatch Funds."

Any Overmatch Funds should appear in applicant's Budget spreadsheet on the line labeled Overmatch and on the Budget Narrative in the Overmatch section. Overmatch

Funds may be used for additional programming or overhead expenses related to this program.

E. Expectations and Compliance

I. Sustainability

Subgrantees are encouraged to sustain their programs beyond the second year of the grant. Part of sustainability includes sharing the knowledge gained through participation in this grant program with other agencies, so that PCTI care may become the normative strategy for serving older adults.

II. Expectations

Subgrantees are expected to begin implementation of the proposed program by March 1, 2019. Implementation is defined as progress toward program launch and does not necessarily mean service delivery.

Subgrantees join a community of practice and are expected to participate in the technical assistance activities associated with the JFNA Center for Advancing Holocaust survivor Care, including:

- Participating in regular “check-in” calls and periodic site visits by JFNA program staff;
- Participating in 3-4 cohort webinars or conference calls per year, devoted to topics relating to Holocaust survivors and the PCTI approach;
- Attending the annual national JFNA Training Workshop;
- Disseminating program materials and innovations through national conferences, online resources, and publications;
- Serving as a peer mentor and a thought leader in the field of PCTI; and
- Participating in evaluations of the PCTI approach.

III. Reporting Requirements

All subgrantees are required to submit Quarterly Programmatic Reports and Quarterly Budget and Spending Reports in electronic format. Each quarter, subgrantees are asked to report on the following:

- Program statistics about the number of Holocaust survivors, caregivers, staff, and community partner professionals who participated in the program during the quarter.
- Program activities, progress towards goals, and measurable outcomes achieved during the quarter as identified in the program proposal;
- Program partners and their roles in program activities;
- Challenges faced during the quarter, actions taken to address these challenges, and the results of the actions;

- Changes to program goal(s) or activities due to challenges;
- Products created during the quarter and how these products were disseminated. Products may include articles, advertising materials, event flyers, issue briefs, fact sheets, newsletters, survey instruments, sponsored conferences and workshops, websites, audiovisuals, and other informational resources;
- Story leads about one or two individuals whose lives have been touched or transformed by this program; and

Once per year, subgrantees are required to submit the following:

- Evidence of Match Form;
- Updated audited financial statements;
- Evaluation Status Update;
- Work Plan;
- Programmatic and Budget Modification Requests, as needed;
- Annual Evaluation Report;
- End of Program Summary, if applicable;
- Carry Over Request, if applicable; and
- Evaluation of the Center for Advancing Holocaust Survivor Care.

IV. ACL Compliance

This grant program is funded by JFNA through a grant from the U.S. Administration for Community Living/ Administration on Aging. The statutory authority for grants is contained in Title IV, Section 411, of the Older Americans Act (OAA) of 1965, as amended by the OAA Amendments of 2006, P.L. 109-365. (Catalog of Federal Domestic Assistance 93.048, Title IV Discretionary Programs). The sub-awards that will be awarded in response to this Request for Proposals (RFP) will include federal funds. The applicants will need to agree to commit to the terms and conditions for receiving federal funds from JFNA (which may change or be updated by the federal government during the program period). Awardees will be subject to the general provisions of 45 CFR Part 75, and in particular 45 CFR §75.351 and §75.352.

V. DUNS and SAM Registration

All applicants must obtain a Data Universal Numbering System (DUNS) number and register in the Federal System for Award Management (SAM) system. Proof of registration must be supplied to JFNA before funds will be disbursed. This process is not difficult to complete, but registration may take up to one month; therefore, it is recommended to begin now. Please note that organizations must procure a DUNS number before registering in SAM.

Instructions for registering:

- If you have not previously registered in DUNS or SAM, review all instructions in this link before you register: <https://www.fws.gov/international/pdf/sam-duns-registration-instructions.pdf>
- DUNS Number: A Data Universal Numbering System (DUNS) number is needed before registering in SAM. DUNS numbers are unique to each physical location registering. A DUNS number can be requested free of charge by visiting Dun & Bradstreet (D&B) <http://fedgov.dnb.com/webform> or by calling the dedicated toll-free DUNS number request line at 1-866-705-5711. It typically takes one to two business days to obtain a DUNS number.
- SAM: The applicant organization is referred to as an “Entity.” Applicants must register to do business with the U.S. Federal Government by completing the registration process in SAM. There is no charge to register or maintain your entity registration record in SAM. Please click here for more information: [www.sam.gov/sam/transcript/Quick Guide for Grants Registrations.pdf](http://www.sam.gov/sam/transcript/Quick%20Guide%20for%20Grants%20Registrations.pdf)

F. Review Process and Criteria

I. Review Process

JFNA convenes a Review Committee to review proposals. The Committee is comprised of professionals with knowledge of Holocaust survivors, aging services, program planning and evaluation, trauma-informed care, refugee resettlement, and organizational capacity building.

Proposals are scored based on the criteria outlined in Section 3 of this RFP and Program Guidelines. Funding recommendations are based on proposal scores, diversity of organization size, target population(s), geographic region, service category, and type of PCTI innovation to create a diverse pool of subgrantees required to meet the overall goals of the program. When evaluating a new proposal from a current subgrantee, program success, compliance and timely completion of all subgrantee requirements is considered, as is the description of dissemination and partnership strategies. Applicants may include supporting letters from community partners or public officials, but these letters will not add points to the score.

The application process consists of two stages. In Stage 1, the Review Committee scores all proposals, and then applicants are notified as to whether the proposal has advanced to Stage 2. In Stage 2, JFNA offers guidance to help applicants modify their proposals to meet available funding and to fit within the guidelines of the grant. If the application involves a sub-subgrantee partnership, letters of commitment from the proposed sub-subgrantee will be required at this time. JFNA will vet Stage 2 application materials before final award decisions are made. JFNA will have the financial resources

to fund all successful applications that advance to Stage 2. **Final award decisions will be made by JFNA.**

II. Review Criteria

The Review Committee will score the application based on responses to the instructions that appear in the Guidance section of this RFP. The total points possible is based on the type of application submitted. Applications that are from current or previous JFNA subgrantees and applications that include sub-subgrantee partnerships require responses to additional questions on the Questionnaire, and are therefore scored on those additional questions. **The type of application does not constitute an advantage or disadvantage in scoring, as the percentage is calculated by dividing the total points earned by the total points possible for each application.**

Questions are worth 5, 10, 15, or 20 points. Reviewers allot points based on the quality of the applicants' responses. The quality is rated on a spectrum ranging from insufficient, to average, to excellent. The lowest number of points indicates an insufficient response, and the highest number of points indicates an excellent response.

Total Points Possible Per Application Type:

- 1) Standard Application: 315
- 2) Current or Previous JFNA Subgrantee Application: 330
- 3) Sub-subgrantee Partnership Application: 370
- 4) Current JFNA Subgrantee + Sub-subgrantee Partnership Application: 385

G. Submitting the Application Online

I. Optional, Informational Telephone Calls

June 28, 2018; 3:30 pm ET and

July 9, 2018; 1:00 pm ET

Phone number: (605) 472-5225

Passcode: 488673 # RSVP at www.HolocaustSurvivorCare.org

The same content will be addressed on each call. Questions received in advance at HolocaustCenter@JewishFederations.org will receive priority on the call.

Participants may email additional questions during the call. Answers to questions discussed on the call will be posted online. The calls will be recorded and made available on the Center's website.

II. Intent to Apply

July 16, 2018 at 11:59 pm ET at www.HolocaustSurvivorCare.org.

When completing the form, please provide the following information:

- Name and address of organization
- Name, title, phone number(s) and email address of application author or main point person
- Geographic area served by program, as specific as possible
- Confirmation of 501(c)(3) status
- Status of SAM registration and DUNS number

Following submission of the Intent to Apply, applicants will receive a confirmation email.

III. Stage 1 of Application Due

August 27, 2018 at 11:59 pm ET at www.HolocaustSurvivorCare.org

Write out all acronyms the first time they are used.

In addition to submitting the application materials, applicants must complete the online form with contact information and a 100-word executive summary of the proposed program. Sample executive summary:

“Excellent Senior Services has been a pioneer in elder care for 20 years. This program will provide wrap-around services for psycho-social well-being of Holocaust Survivors, with particular emphasis on those who are isolated. The three steps are 1) socialization events, 2) group therapy, and 3) a friendly visitor program. The goal is to decrease self-reported social isolation. We will utilize a PCTI based assessment, followed by quarterly evaluations in order to assess the clients’ progress. Excellent Senior Services will develop a fundraising campaign and use data from our program evaluation to demonstrate impact and maintain programming after JFNA funding ends.”

The proposal consists of the following elements:

- a) Questionnaire
- b) Budget
- c) Budget Narrative
- d) Work Plan

Additionally, applicants are required to submit the following financial documentation:

- a. Full organization budget for current fiscal year

- b. Full organization budget for most recent completed fiscal year
- c. Independent audit letter (management letter)
- d. Most recent full organization audit
- e. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable
- f. A copy of the organization's current IRS tax-exempt status determination letter or most current Form 990, OR Certificate of Incorporation or equivalent document for qualified religious organizations not required to file Forms 990 and 1023
- g. DUNS number and SAM registration confirmation, or verification that registration is in progress

IV. Stage 2 Materials Due

December 7, 2018; 12:00 pm ET

Agencies and organizations that advance to this stage will be required to submit the following items:

- a. Explanation of Program Revisions
- b. Revised Budget
- c. Revised Budget Narrative
- d. Revised Work Plan
- e. Sub-subgrantee partnership applications will need letters of commitment from partners

Additional materials may be requested at this stage.

Section 3: Guidance for Completing Application Templates

A. Completing the Questionnaire

1. DEMONSTRATED COMMUNITY NEED (10 points)

- A. Describe the Holocaust survivor population in the community, including the estimated number of survivors in the catchment area and the estimated number of survivors that the organization currently serves. Include demographic information about the survivor population. (5 points, 200 words)
- B. Describe the unmet needs of the Holocaust survivors in the community. (5 points, 150 words)

2. ORGANIZATION CAPACITY (15 points)

- A. Describe the organization's history of serving Holocaust survivors, as well as current services offered to survivors. (5 points, 200 words)

- B. Explain the organization's capacity to successfully carry out the program proposal in terms of staffing, administrative support, technology, financial resource management, other infrastructure, and ability to comply with grant requirements. (10 points, 300 words)

3. PROGRAM OVERVIEW AND DETAILS (100 points)

- A. Present a brief summary of the program including its goals. (10 points, 200 words)
- B. List and describe the content of any program activity, such as classes, trainings, events, case management, or other services that will be held in Year 1 and Year 2 of the grant, indicating how many events will take place in each program year. Please ensure this information is reflected in the Work Plan. (20 points, 800 words)
- C. Explain how the proposed program addresses unmet Holocaust survivor needs in the community. (15 points, 200 words)
- D. Indicate the number of participants the program aims to benefit in Year 1 and Year 2 of the grant. Explain the rationale and strategy for creating a program with the selected number of participants. (5 points, 200 words)
- E. Explain the observable, expected outcomes from the program and how they will be achieved using the PCTI approach. (10 points, 200 words)
- F. Describe the organization's plan to evaluate the impact of this proposed program on its participants. (5 points, 200 words)
- G. Explain the organization's strategy to include program participants (i.e. Holocaust survivors, caregivers, or community service providers) in the planning and implementation of the proposed PCTI program. (5 points, 150 words)
- H. Explain the organization's strategy to include community partners in the proposed PCTI program or innovation. (15 points, 150 words)
- I. Explain how the services provided through this program would be innovative and different from the services currently provided by the organization to Holocaust Survivors. (10 points, 150 words)

4. SUSTAINABILITY AND DISSEMINATION (45 points)

- A. Describe the organization's plan to meet the required match. Explain how the strategy is feasible and realistic. (10 points, 150 words)
- B. Explain how the program will be sustained in Year 2 of the grant, when the JFNA portion of grant funding is expected to decrease by 50%, without negatively impacting client services. (10 points, 200 words)

- C. Explain the organization's strategy to integrate PCTI principles into the organization's work with other populations. (10 points, 200 words)
- D. Explain the organization's strategy to transfer knowledge of PCTI care to other organizations or stakeholders in the aging services network. (15 points, 200 words)

5. SUB-SUBGRANTEE PARTNERSHIPS (If applicable) (55 points)

Only complete this section if the program involves sub-subgrantees. Agencies that receive grants from JFNA are *subgrantees*. Agencies that receive financial support from subgrantees are *sub-subgrantees*. If the program involves collaboration with other organizations that are not sub-subgrantees please do not complete this section.

- A. Explain the strategy for partnering with sub-subgrantees. Indicate the roles and responsibilities of each partner and how, together, these roles provide a cohesive strategy for implementing the program. (20 points, 300 words)
- B. Describe how knowledge of PCTI care will be transferred to or from the sub-subgrantee. (5 points, 100 words)
- C. Describe how the organization will distribute funding and ensure responsible fiscal oversight of the sub-subgrantee partners. (15 points, 200 words)
- D. Describe how the agencies within the partnership will communicate and how often. (5 points, 100 words)
- E. Indicate whether the sub-subgrantee partners already agreed to the partnership. (10 points, 100 words)

6. QUESTION FOR CURRENT OR PREVIOUS JFNA SUBGRANTEES ONLY (15 points)

- A. This section has only one question. Please address only the question that applies to your organization based on program year:
 - i. If the applicant is part of Alpha Cohort (Program Year 1 began March 1, 2016) or Bravo Cohort (Program Year 1 began March 1, 2017) and if the proposed program is new, please describe the differences between the organization's other JFNA-funded program and the proposed program, explaining how these differences are sufficient enough to warrant new grant funding. If the proposal is not for an entirely new program, describe how the new proposal represents an innovation within the program, elevates the program,

advances the practice, and promotes the dissemination and sustainability of the existing PCTI innovation. If the proposal is a combination of new and enhanced programs, clearly state which parts are new and which parts are enhancements that advance the practice. (15 points, 500 words)

- ii. If the applicant is part of Charlie Cohort (Program Year 1 began March 1, 2018), describe the differences between the organization's current programs and this proposed program, explaining how these differences are sufficient enough to warrant new grant funding. (15 points, 500 Words)

B. Completing the Budget

This guidance is best utilized when read in combination with the provided Budget template.

I. General Information

Submit a proposed budget using the template provided. **Only budgets using the provided template will be reviewed.** List the amount of JFNA funds requested, the applicant's match, and the total program budget. The provided budget template contains formulas that will automatically calculate the minimum required match, based on the amount of funding requested from JFNA. Applicants may remove the formulas if necessary. Applicants should add lines for additional costs as needed.

This budget should encompass a two-year programmatic budget, covering the period of March 1, 2019 through February 29, 2020 and from March 1, 2020 through February 28, 2021.

II. Required Elements

Applicant's budget should include:

- Program Revenue listed by source
 - Proposed Award from JFNA
 - Agency Support
 - Federation Grants
 - State Government Grants
 - Local Government Grants
 - Foundation Grants
 - Individual Contributions
- Program Expenses
 - All program personnel (full or part-time) directly employed by organization
 - Fringe benefits
 - Consultants
 - Travel to JFNA's annual Training Workshops (two total)
 - Event space

- Food and beverages
- Activity supplies
- Entertainment
- Marketing for program outreach and events
- Printing and copying for outreach and events
- Website creation and/or maintenance related to the proposed program
- Staff travel for service delivery
- Transportation for Holocaust survivors
- Contractual (such as outsourced congregate meal program or third-party home health aides)
- Overhead

III. Overhead

Overhead is defined as: (i) rental costs for office space (excluding the cost of short-term rentals for event space for program-related activities); (ii) costs of operating and maintaining facilities; (iii) general administration; and (iv) general expenses such as salaries and expenses of executive officers, personnel administration, accounting and office equipment and supplies. Overhead does not include cellular phones or computers that are specifically dedicated to the program.

Overhead may not exceed 10% of total program budget (JFNA grant + required match).

If this is a Partnership application, overhead costs from a sub-subgrantee are included in the overhead for the overall program.

IV. Budget (40 points):

A budget for this grant program must have the following characteristics:

- Budget is coherent and logical (20 points)
- Budget is reasonable to meet the goals proposed in the application (20 points)

C. Completing the Budget Narrative

This guidance is best utilized when read in combination with the provided Budget Narrative template.

The budget narrative explains the rationale of the organization's proposed budget. The Review Committee will not be able to contact applicants with questions about the budget. Please use the budget narrative to explain the numbers and decisions behind the proposed budget. All applicants are required to use the provided template for their budget narrative. Please limit clarification statements to 150 words or less per lettered section and double-space all answers.

Program Revenue

I. Financial Contributions

Include an explanation of each funding source and whether that funding is secured, in process, or anticipated.

II. In-Kind Contributions

List all in-kind/non-monetary contributions the organization anticipates receiving and using for this program. Include a breakdown of the monetary value. List the source of the contribution (i.e. an individual, organization, etc.). For contributions of personnel, please include salary/wage levels for each staff member and/or consultant. In addition, provide the cost of rental space, if applicable. Clarify whether each contribution is secured, in process, or anticipated. Volunteer hours can be calculated with the following equation: number of hours worked multiplied by \$24.69 = value of in-kind contribution.

Program Expenses

III. Personnel

List all personnel supported by the JFNA grant, including staff members and consultants (excluding homecare aides). In the third column, type 'staff' or 'consultant' to indicate who is filling the position. In the fourth column, type 'current' or 'future' to differentiate between personnel who are currently employed by the organization and future hires.

IV. Training Workshop & Conferences

JFNA requires subgrantee participation in each annual Training Workshop. Throughout the duration of the two-year grant, there will be two Training Workshops. Include the breakdown costs of staff travel to the JFNA Training Workshop. For this purpose, estimate costs for attending the first Training Workshop in Washington, DC, lasting two to three days and two to three nights, including a maximum cost of \$4,000. Subgrantees may send as many staff to Training Workshops as they wish within the \$4,000 allowable budget. Any charges above \$4,000 cannot be charged to the JFNA subgrant. An additional \$4,000 may be budgeted for the second Training Workshop in year two.

V. Program Activities (Events, Classes, and Meetings)

Explain the cost for the following items and activities necessary to implement the program. Please include the number of events, people, and/or items.

- (1) Event space
- (2) Food and beverages
- (3) Activity supplies and materials
- (4) Entertainment

- (5) Marketing for program outreach and events
- (6) Printing and copying
- (7) Website
- (8) Staff travel for service delivery
- (9) Travel for Holocaust survivors if travel is part of this program

VI. Overhead

Define each item and its cost/rate below. Please indicate if the organization has an indirect cost agreement with the federal government. Refer to the section of the RFP titled "Overhead" for the definition and limitations of overhead.

Budget Narrative (45 points):

The budget narrative for the grant program should include the following characteristics:

- A feasible and realistic explanation of funding sources for each financial contribution indicated on the budget (5 points)
- All information about program staffing, including a listing by position, including all full or part-time employees dedicated to this program (10 points)
- A list and explanation of the costs associated with activities, events, classes, and meetings (20 points)
- The program costs in the budget correlate with the program tasks in the Work Plan (10 points)

D. Completing the Work Plan

This guidance is best utilized when read in combination with the provided Work Plan template.

I. Definitions:

- Goal: An aim or desired result of a program, event, or initiative (e.g., improved mental health among Holocaust survivors)
- Outcome: The measurable change or benefit that results from the program (e.g. 30% decrease in Holocaust survivors reporting that they feel depressed)
- Major Objective: Primary desired result of a particular task or tasks (e.g., increased organization capacity to provide mental health services to Holocaust survivors)
- Key Task: A focused and specific piece of work often to be finished within a certain time that are critical for reaching the major objective (e.g., hiring of mental health professionals)

II. Template Guidance:

Using the template provided, create a Work Plan for each program goal using the guidance below:

- Fill out the first page of the template, listing every goal of the program.
- Complete a separate chart for each goal.
- List the goal and measurable outcome at the top of the chart.
- List the major objectives next to the numbered row, and the main tasks under the objectives. Add rows for tasks and objectives, as necessary. Delete rows that are not necessary.
- In the column titled “Lead Person(s),” note the job title of the individual who will take the lead on accomplishing the task.
- Indicate the anticipated completion dates for the major objectives by filling the box(es) in black that correspond with the month(s) when the tasks will be addressed.
- Create a key, listing each staff position entered in the Work Plan and its associated abbreviation (e.g.: SVP = Senior Vice President).

Work Plan (40 points):

A Work Plan for this grant program should include the following characteristics:

- Clear program goals (5 points)
- Measurable program outcomes (5 points)
- Reasonable objectives (5 points)
- Reasonable tasks (5 points)
- Reasonable timeframes (5 points)
- Feasible and realistic amount of work required for each staff member (10 points)
- Program implementation will begin by March 2019 (see page 14 for definition of implementation) (5 points)

Overall Assessment (20 points):

- The cumulative proposed program (proposed program, budget, budget narrative, and Work Plan) is clear, cohesive and realistic, and likely to result in the stated outcomes. (20 points)

Bonus Points

These points are added to the total points earned, and not the total points possible, on the application. Only applications that meet these criteria will receive bonus points. Applications that do not meet these criteria will not lose points.

- ***Is the applicant proposing a sub-subgrantee partnership? (Yes/No) (20 points)***
- ***Does the proposed program include one or more of the following service categories? (Yes/No) (20 points total)***
 - Engaging Holocaust survivors as volunteers
 - Serving Holocaust survivors who have been impacted by natural or man-made disasters (hazards caused by human action or inaction) or who live in disaster-prone areas
 - Programs involving PCTI infused case management
 - Legal assistance or benefits counseling
 - Programs involving home safety