



The Jewish Federations®
OF NORTH AMERICA

Center on Aging
and Trauma

a project of the Holocaust Survivor Initiative

Request for Proposals and Program Guidelines

*Innovations in Person-Centered, Trauma-Informed Supportive Services for
Holocaust Survivors, Older Adults with a History of Trauma, and Their
Family Caregivers*

Innovations Program

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Grant Overview

1. Background

- a. In 2020, The Jewish Federations of North America (JFNA) received a grant from the U.S. Department of Health and Human Services, Administration for Community Living/Administration on Aging (ACL/AoA), called *Expanding the National Capacity for Person-Centered, Trauma-Informed Care: Services and Supports for Holocaust Survivors and Other Older Adults with a History of Trauma, and Their Family Caregivers*. Person-Centered, Trauma-Informed (PCTI) care is a holistic approach to service provision that promotes the dignity, strength, and empowerment of trauma survivors by incorporating knowledge about the role of trauma in survivors' lives into organization programs, policies, and procedures.
- b. This grant builds upon a prior grant from ACL/AoA to JFNA, which advanced PCTI supportive services for Holocaust survivors and their family caregivers. Under the prior grant, JFNA and its subgrantees developed, implemented, and evaluated hundreds of programs for Holocaust survivors. This new grant uses the lessons learned from that previous grant to expand PCTI support for Holocaust survivors and diverse older populations. Thus, the project is rooted in Holocaust survivor care, but serves diverse older populations in addition to Holocaust survivors.
- c. JFNA uses grant and philanthropic funds to award subgrants to expand the national capacity to provide PCTI care to Holocaust survivors, older adults with a history of trauma, and their family caregivers. The subgrants are awarded through JFNA's Center on Aging and Trauma (the Center), a project of JFNA's Holocaust Survivor Initiative. The Center on Aging and Trauma aims to increase the number and type of PCTI services for Holocaust survivors, older adults with a history of trauma, and their family caregivers and build national capacity to provide PCTI care to these populations.
- d. Subgrantees earn recognition as leaders in aging services and trauma-informed care.

2. Request for Proposals

- a. The Center on Aging and Trauma is seeking proposals in its Innovations program for the expansion of PCTI services for Holocaust survivors, older adults with a history of trauma, and their family caregivers. Organizations throughout the United States that serve diverse populations of older adults with a history of trauma and/or their family caregivers are encouraged to apply.
- b. While expanding PCTI services, the organization is encouraged to infuse the principles of PCTI care into other aspects of organizational functioning. Infusing the principles of PCTI care in broader organizational functioning aids in sustainability of the grant-funded program and promotes organizational support for the PCTI framework.
- c. **JFNA will only commit to fund subgrantees through this RFP for one year.** JFNA intends to fund subgrantees for two years, pending Congressional appropriations and grant compliance. The grant is dependent upon

Congressional appropriations because it is federally funded. JFNA calls on applicants to consider this a two-year program, and to propose a two-year budget. If funding is available for the second year, JFNA's intention is to award subgrantees in the Innovations program **the same amount of funding in the second year as in the first year**, dependent upon compliance with all program requirements and the success of the subgrantee's program.

- d. e. This is the first RFP cycle for the Innovations program under this federal grant. Under JFNA's prior federal grant, it funded five cohorts of subgrantees in the Innovations program. New subgrantees in this RFP cycle will comprise the "**Fig Tree Cohort**" and will join other prior cohorts as leaders in PCTI care.
 - e. This RFP process will be competitive. Not all proposals will receive funding, and those that do may not receive the full amount requested.
3. Additional Resources on Person-Centered, Trauma-Informed Care:
- a. Resources, webinars, and other publications can be found under the Resource Hub at www.AgingAndTrauma.org and in the Aging and Trauma Resource Bibliography at https://cdn.fedweb.org/fed-42/2/AgingAndTrauma_ResourceBibliography_CenterOnAgingAndTrauma%25281%2529.pdf
 - b. Substance Abuse and Mental Health Services Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach: https://ncsacw.samhsa.gov/userfiles/files/SAMHSA_Trauma.pdf
 - c. The Administration for Children & Families' Resource Guide to Trauma-Informed Services: <https://www.acf.hhs.gov/trauma-toolkit>

Application Eligibility and Logistics

1. Eligibility
 - a. Eligible entities are domestic public or private non-profit entities. Entities may include state and local governments, Indian tribal governments and organizations (American Indian/Alaskan Native/Native American), faith-based organizations, community-based organizations, hospitals, and institutions of higher education.
 - i. To be eligible to apply, the entity must be:
 1. A direct service provider to populations that include, but are not limited to, older adults and/or to family or informal caregivers of older adults.
 2. An entity with at least one audit report.
 3. Based in the U.S.
 4. Registered in SAM and have a DUNS number by the time funding is disbursed. For more information, see page 13.
 - b. Funds awarded by JFNA are mostly comprised of federal government funds. Local matching funds to this JFNA grant are subject to the same requirements as government funds.
 - c. An organization currently receiving JFNA funds through the Center on Aging and Trauma is eligible to apply for this Innovations RFP. However, the new proposal

must either be for a new project or a deepening or expansion of an existing project.

- d. Sub-grantee partnership parameters:
 - i. 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 funding** through JFNA subgrantees to carry out grant activities are *sub-subgrantees*.
 - ii. Subgrantees and sub-sub grantees are all held to the same requirements for use of federal funds.
 - e. In applications involving sub-subgrantee partnerships, 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.
 - f. An organization may only apply for this Innovations grant through one application and **cannot** submit an application for itself **and** also be part of an application in this RFP involving a different, separate sub-subgrantee partnership.
 - g. As an example, if the subgrantee partners with and funds an organization that specializes in providing art therapy to older adults to develop PCTI-infused art therapy classes, this relationship would be a sub-subgrantee relationship. 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 or vendor relationship and does not require completion of the sub-subgrantee question on 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.
 - h. The relationship between the subgrantee and the sub-subgrantee must be stated clearly in the application. If the sub-subgrantee partnership application advances to the second stage of the application process, the sub-subgrantee(s) will be required to submit letters confirming their participation in the proposed program.
2. Funding Limitations and Requirements
- a. Funding may **NOT** be used for:
 - i. The development of PCTI training materials without a direct service component to the project.
 - ii. Continuation of existing projects without expansion or new and innovative approaches in PCTI care.
 - iii. Services to treat secondary trauma if the client is not currently a family or informal caregiver to a Holocaust survivor or other older adult with a history of trauma.
 - iv. Attendance at trainings, conferences, or professional development activities unrelated to this JFNA-funded program.

- v. Non-social service programs (e.g. recording testimony for the sole benefit of educating the community).
- vi. Programs that only consist of a needs assessment. If the needs assessment is part of a larger program, it is allowable.
- vii. Institutional care.
- viii. Income maintenance.
- ix. Grants to individuals.
- x. The production of materials or tools to be licensed or sold.
- xi. Religious instruction. Limitations on religious activities can be found here: <https://cdn.fedweb.org/fed-42/2/Religious%2520Guidance.pdf>
- xii. Limitations related to the use of grant funds for meals can be found here: <https://cdn.fedweb.org/fed-42/2/Grant%2520Funding%2520For%2520Meals%2520Last%2520Updated%252019March2018.pdf>
- xiii. Endowments, capital campaigns, or fundraising unrelated to the match requirement for this program.
- xiv. Publication subsidies and advertising costs for general organization operations unrelated to this program.
- xv. Lobbying or political activities.
- xvi. Basic research (e.g. scientific or medical experiments).
- xvii. 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. Allowable purchases include, but are not limited to, emergency response systems, iPads, or grab bars, provided they are tied to the intent of this grant.

3. Grant Timeline

a. Application Process Overview:

- i. **Informational Call:** One optional informational conference call will be held for interested parties. The call will be recorded and posted on the Center's website.
- ii. **Intent to Apply:** Interested applicants must submit an Intent to Apply, which will be used to estimate the number of people needed for JFNA to form a Review Committee.
- iii. **Stage 1:** The Review Committee scores all proposals and the Center notifies applicants as to whether the proposal has advanced to Stage 2.
- iv. **Stage 2:** The Center offers guidance to help applicants modify their proposals in order to meet available funding and to fit within the guidelines of the grant.
- v. **Award Letter:** The Center sends an award letter and Cooperative Agreement to successful applicants.

b. Informational Calls:

- i. **Questions sent in advance to Aging@JewishFederations.org will receive priority on the call.** Participants may ask questions during and after the call. The Center will not provide an opinion on application ideas.

- ii. The informational call will be recorded and the recording will be placed on the website (<https://holocaustsurvivorcare.org/grant-hub/apply>) for public view. The website will also include an FAQ that will be updated with questions that are widely applicable and are not covered in the RFP.
- iii. Call date: **Thursday, May 20, 2021 at 3:00pm ET**
 - 1. Dial one of the following numbers:
+1 (301) 715-8592 or +1 (669) 900-6833
Both numbers will access the same informational call.
 - 2. Enter the meeting ID: 997 0560 3478
 - 3. Then enter the participant ID: #
 - a. *(Note: if you are calling from outside the US, please email Aging@JewishFederations.org at least 48 hours in advance)*
- c. Application Timeline:
 - i. Friday, May 28, 2021 at 5:00pm ET: Online submission of required Intent to Apply due
 - ii. Friday, July 9, 2021 at 5:00pm ET: Stage 1 Applications due
 - iii. Early November, 2021: Stage 2 Notification for applicants
 - iv. Friday, December 10, 2021 at 3:00pm ET: Stage 2 Applications due
 - v. Tuesday, January 18, 2022: Anticipated date for award announcements
 - vi. Tuesday, March 1, 2022: Grant program implementation begins

Priority Populations and Service Categories

1. Populations

- a. **Older adult** is defined as a person who is age 60 or over, in accordance with the Older Americans Act (OAA).
- b. **Holocaust survivor** is one priority population under this grant. 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.
- c. A **family caregiver** is a family member, partner, or friend who assists an older adult with a chronic, disabling, or health condition. Family caregivers may be served if they are currently caregivers to an older adult with a history of trauma. The services must support their role as caregivers.
- d. For purposes of this grant, ACL is focused on serving **older adults with a history of trauma and their family caregivers**. There is not one singular definition of trauma. For example, the Substance Abuse and Mental Health Services Administration (SAMHSA) describes individual trauma as resulting from "an event, series of events, or set of circumstances that is experienced by an individual as physically or emotionally harmful or life threatening and that has lasting adverse effects on the individual's functioning and mental, physical, social, emotional, or spiritual well-being."

2. Service Categories

- a. Programming supported by this grant must include methods of delivering PCTI care to Holocaust survivors, and/or older adults with a history of trauma, and/or their family caregivers.
- b. This includes incorporating new programming, new methods, or a new focus on a population into an existing innovative program, **or** developing a new program.
- c. JFNA will **not** fund an outright continuation of an existing program without any enhancement.
- d. Programs can be innovative for the field, organization, or program. What is innovative for one organization might not be innovative for another.
- e. Applicants may propose to expand or build upon successful models of service delivery that emerged as a result of the COVID-19 pandemic. For example, applicants may continue, refine, or institutionalize advancements made during the COVID-19 pandemic to allow for more flexible and responsive PCTI services in emergency situations.
- f. Given the uncertainty surrounding the COVID-19 pandemic, programs proposed must be able to operate safely in a COVID-19 environment. Proposals that blatantly disregard Centers for Disease Control (CDC) guidelines will not be funded.
- g. 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 include:
 - i. **Physical Health:** Services designed to promote the physical health and well-being of older adults with a history of trauma, 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.
 - ii. **Mental Health:** Services designed to promote the mental and emotional health of older adults with a history of trauma. Services may include individual and group counseling, support groups, creative arts programs, pet therapy, and education and training programs. Projected outcomes may include reported decrease in depression, anxiety, and feelings of loneliness.
 - iii. **Social Health:** Services designed to promote the social health and well-being of older adults with a history of trauma. Services may include online groups and gatherings, technology training programs to promote social connections via email and other online platforms, and in-person coffee houses, educational programs, field trips, discussion groups, friendly visitor programs, and other types of socialization programs when safe and appropriate. Projected outcomes

may include a decrease in social isolation and an increase in feelings of social support.

- iv. **Cognitive Health:** Services designed to promote the cognitive health and well-being of older adults with a history of trauma. Services may include memory support programs and programs designed to reduce anxiety and agitation in older adults with a history of trauma who have Alzheimer’s disease or other cognitive impairments. Program outcomes may include improved cognitive functioning, improved mood, and decreased agitation and anxiety.
- v. **Access to Community Resources:** Services designed to promote safety, empowerment, and aging in place, such as access to social services, case management, transportation, legal assistance, benefits counseling and eligibility assistance; opportunities to volunteer or participate in community service, civic engagement, or social justice activities; 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.
- vi. **Family and Informal Caregiving:** Services designed to promote the physical, emotional, financial, and social health and well-being of family members and friends who currently care for, assist, and support older adults with a history of trauma. Services in this area may include caregiver assessment with follow-up services, counseling and support groups, information and referral, case management, respite, and education and training. Projected outcomes for family caregivers 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.

Funding

1. Award Amounts

- a. JFNA will award grants between **\$15,000 to \$300,000 for each year**. Applicants must apply for one of the following funding levels:

JFNA Award	Minimum Match	Total Program Budget
15,000	5,000	20,000
30,000	10,000	40,000
45,000	15,000	60,000
60,000	20,000	80,000
75,000	25,000	100,000

JFNA Award	Minimum Match	Total Program Budget
90,000	30,000	120,000
105,000	35,000	140,000
120,000	40,000	160,000
135,000	45,000	180,000
150,000	50,000	200,000
165,000	55,000	220,000
180,000	60,000	240,000
195,000	65,000	260,000
210,000	70,000	280,000
225,000	75,000	300,000
240,000	80,000	320,000
255,000	85,000	340,000
270,000	90,000	360,000
285,000	95,000	380,000
300,000	100,000	400,000

- b. Awards include money from the federal grant and JFNA’s national fundraising efforts.
 - c. This RFP process will be competitive. Not all proposals will receive funding, and those that do may not receive the full amount requested.
 - d. Proposals for a higher level of funding should impact more people than proposals for a lower level of funding.
 - e. Subject to availability of federal funds and compliance with all requirements, the intent is for the Fig Tree Cohort to receive funding in Program Year 1 (**March 1, 2022 – February 28, 2023**). If federal funding is available, JFNA intends to fund the Fig Tree Cohort for Program Year 2 (**March 1, 2023 – February 29, 2024**) at the same funding level as in Year 1, dependent upon subgrantee compliance with all program requirements.
2. Match Requirements
- a. All subgrantees are required to contribute **a minimum match equal to 25% of the total program budget. The match may be comprised of cash, in-kind contributions, or a combination of both.** For example, an organization applying for a subgrant of \$120,000 will be expected to contribute a \$40,000 match, bringing the total program budget to \$160,000. Calculate minimum match as follows:
 - i. **JFNA Funds Requested / 3 = Minimum match amount**
 - b. Matching resources take on the characteristics of the JFNA and federal funds and are therefore subject to the same rules regarding their use.
 - c. Subgrantees are responsible for raising minimum matches in both Year 1 and Year 2, if Year 2 funding occurs.
 - d. All proposals must detail the sources the match is expected to come from. Possible sources of the match may include, but are not limited to:

- i. In-kind contributions, including staff and volunteer time, donated goods, and office space.
 - ii. Financial support from the applicant’s organization.
 - iii. State government grants.
 - iv. Local government grants.
 - v. Foundation grants.
 - vi. Individual contributions.
 - vii. Jewish Federation grants.
 - viii. Jewish Federations Human Service Relief Matching -Fund.
 - ix. Claims Conference funds supporting Holocaust survivors.
 - x. KAVOD-SHEF funds supporting Holocaust survivors.
 - e. Funds can only be included as match if both of these conditions are met:
 - i. The match funding must go to the same population as served by the JFNA funded program, and
 - ii. The match funding must be used for the same purpose as the JFNA funded program.
 - f. The following sources **cannot** be used toward the JFNA match:
 - i. Federal funds.
 - ii. Funds used to match other grants
 - g. By August 31, 2022, and by August 31, 2023, subgrantees must demonstrate to JFNA receipt of all cash match funds and a specific plan for the commitment of all in-kind contributions for Year 1 and Year 2, respectively. If subgrantees cannot raise the required minimum match by August 31, 2022, funding for program Year 2 may be in jeopardy.
3. Overmatch
- a. If a subgrantee raises more match than is required by the minimum match obligation (25%), the resulting resources are termed “Overmatch.”
 - b. Overmatch funds may be used for additional programming or overhead expenses related to this program. They can also be used for programming beyond what is allowable by the grant.
 - c. JFNA does not have a preference for applications that show Overmatch. However, if the proposed program needs to use Overmatch in order for the program to be implemented, the Overmatch explains how the full program would be paid for.
 - d. Any overmatch funds should appear in the applicant’s Budget spreadsheet on the line labeled Overmatch and on the Budget Narrative in the Overmatch section.
 - e. Overmatch amount **should not** be included in the “total program budget” amount.

Expectations and Compliance

1. Expectations

- a. Subgrantees are expected to begin implementation of the proposed program by **March 1, 2022**. Implementation is defined as progress toward program launch and does not necessarily mean service delivery.
- b. Subgrantees join a community of practice and are required to participate in the technical support activities associated with the JFNA Center on Aging and Trauma, including:
 - i. Participating in regular virtual “check-in” meetings and periodic site visits by Center program staff
 - ii. Evaluating Center-funded PCTI programs in consultation with the Center, and reporting on evaluation progress and findings to the Center.
 - iii. Participating in three to four webinars per year, that are devoted to topics relating to older adults, family caregivers, and the PCTI approach
 - iv. Participating in the Center’s Training Workshop
 - v. Disseminating program materials and innovations through national conferences, online resources, and publications
 - vi. Serving as a peer mentor and a thought leader in the field of PCTI care
- c. Subgrantees are encouraged to sustain their programs beyond the grant period. Part of sustainability includes sharing the knowledge gained through participation in this grant program with other organizations, so that PCTI care may become the normative strategy for serving older adults.
- d. The Center offers coaching on fundraising and sustainability, evaluation strategies, program development, and on how to implement PCTI strategies throughout an organization.

2. Reporting Requirements

- a. All subgrantees are required to submit the following reports:
 - i. Quarterly Spending Report
 - ii. Quarterly Program Participant Report
 - iii. Quarterly Programmatic Report
 - iv. Programmatic and Budget Modification Request, as needed
 - v. Annual Work Plan
 - vi. Annual Program Evaluation Update
 - vii. Annual Evidence of Match Report and Updated Financial Documentation
 - viii. Annual Evaluation Report
 - ix. Annual Technical Support Survey
 - x. End of Program Summary Report
 - xi. No-cost extension request, if applicable

3. Compliance with Federal Statutory Authority and Provisions

- a. This grant program is funded by JFNA through a grant from the U.S. Department of Health and Human Services 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 Supporting Older Americans Act of 2020 (P.L. 116-131) (Catalog of Federal Domestic Assistance 93.048, Title IV Discretionary Programs).

- b. The funds that will be awarded in response to this 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, specifically 45 CFR §75.351 and §75.352, found here: <https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=1&SID=df3c54728d090168d3b2e780a6f6ca7c&ty=HTML&h=L&mc=true&n=pt45.1.75&r=PART#>.
4. DUNS and SAM Registration
 - a. All applicants must obtain a Data Universal Numbering System (DUNS) number and register in the Federal System for Award Management (SAM). Proof of registration must be supplied to JFNA before funds will be disbursed. Since registration may take up to one month, it is recommended to begin now. **Please note that organizations must procure a DUNS number before registering in SAM.**
 - b. Registering for a DUNS or SAM number:
 - i. 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>
 - ii. DUNS number: A unique number is assigned for each physical location registering. A DUNS number can be requested free of charge by visiting Dun & Bradstreet (D&B) at <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.
 - iii. SAM registration: 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. It is **free of charge** to register and maintain an entity registration record in SAM. Please click here for more information: https://www.sam.gov/SAM/transcript/Quick_Guide_for_Grants_Registrations.pdf

Review Process and Criteria

1. Review Process
 - a. JFNA convenes a Review Committee to review proposals. The Review Committee is comprised of professionals with knowledge of aging services, diverse older populations with a history of trauma, program planning and evaluation, trauma-informed care, and organizational capacity building.
 - b. In order to create a more level playing field between applicants with experience in JFNA’s grants and applicants without that experience, the review teams will review the proposals separately. Proposals will be reviewed and scored in two

separate categories based on the applicant organization's history with JFNA's prior federal grant program. The categories are:

- i. Organizations that have received a grant, either directly or indirectly, from JFNA's federal grant program, and
 - ii. Organizations that have never received a grant from JFNA's federal grant program.
- c. A complete application includes Basic Information, a Questionnaire, Budget, Budget Narrative and Work Plan. Applications will be evaluated on whether the cumulative proposed application is clear, cohesive, and realistic, and likely to result in the stated outcomes.
 - d. Funding decisions 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.
 - e. Applicants may include supporting letters from community partners or public officials, but these letters will not add points to the score.
 - f. The application process consists of two stages:
 - i. In Stage 1, the Review Committee scores all proposals and the Center notifies applicants as to whether the proposal has advanced to Stage 2.
 - ii. In Stage 2, JFNA offers guidance to help successful applicants modify their proposals in order to meet available funding and to fit within the guidelines of the grant.
 - g. JFNA will have the financial resources to fund all successful applications that advance to Stage 2. Final award decisions will be made by JFNA. **Not all proposals will receive the full amount requested.**
2. Review Criteria
 - a. The Review Committee will score the application based on responses to the instructions that appear in the Guidance section of this RFP. The score is calculated by dividing the total points earned by the total points possible (300 points)
 - b. 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.

Application Phases

1. Intent to Apply
 - a. The Intent to Apply is submitted at www.AgingAndTrauma.org
 - b. The Intent to Apply is mandatory and is used to help JFNA form a Review Committee, but will not be scored or seen by the Review Committee.
 - c. The Intent to Apply consists of the following elements:
 - i. Full name and address of organization

- ii. Name, title, phone number(s), and email address of application main point of contact
 - iii. Name, title, and email address of organization's executive leader
 - iv. Geographic area served by program, as specific as possible
 - v. Target population to be served, understanding this may change with the application.
 - vi. Indication of how applicant learned about this RFP
 - vii. Status of DUNS number and SAM registration
 - d. Following submission of the Intent to Apply, applicants will receive a confirmation email.
2. Stage 1 Application
- a. All application materials including templates can be found at www.AgingAndTrauma.org.
 - b. Stage 1 applications will be submitted to www.AgingAndTrauma.org.
 - i. Foundant Technologies is the grant management software program. If you run into any errors or technical issues while applying, you will receive a pop-up window asking you to email Foundant Technologies about the error.
 - 1. This link (<https://docs.google.com/document/d/1HyVKOrd9FIHscI3tsupIHKpwzcrMRqwWF43t4zXK9NY/edit>), provides an applicant tutorial that can be helpful.
 - 2. You can also contact JFNA at Aging@JewishFederations.org
 - c. **Please submit your application at least 3 business days prior to the deadline to give time to address any technical questions.**
 - d. Ensure all acronyms are written out the first time they are used.
 - e. Applicants must first enter Basic Information, which is not scored but is accessible to the Review Committee and will help verify eligibility and provide an overview of your organization and your proposal. The Basic Information consists of an online form with executive contact information; an eligibility checklist; the funding request level; a description of the proposed program participants and other populations served by the agency; information about the organization's mission, history, and services; an indication of whether the organization has been funded by JFNA's Center on Aging and Trauma/Center for Advancing Holocaust Survivor Care in the past; and a 1200 character count (including spaces) executive summary of the proposed program.
 - i. Sample executive summary: *"Senior Services of Example County will provide PCTI-infused virtual socialization events, group therapy, and a safe friendly visitor program to 100 socially isolated older refugees to increase their sense of connection and belonging. The goal of the program is to improve participants' social health. The measurable objectives are to have 3 socialization events a quarter with 50 participants each, bi-weekly therapy groups with 10 participants each, and a friendly visitor program with 20 volunteers visiting 2 refugees*

each week. Anticipated measurable outcomes include decreases in self-reported loneliness and social isolation among participants. Written surveys will be administered to participants on a semi-annual basis to determine project impact and to record promising practices. Senior Services will develop a fundraising campaign and use data from our program evaluation to help sustain the program.”

- f. The proposal consists of the following elements:
 - i. Basic Information
 - ii. Questionnaire
 - iii. Budget
 - iv. Budget Narrative
 - v. Work Plan
 - vi. Financial Documentation
 1. Full organization budget for current fiscal year
 2. Full organization budget for most recent completed fiscal year
 3. Independent audit letter (management letter)
 4. Most recent full organization audit
 5. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable
 6. 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
 7. DUNS number and SAM registration confirmation, or verification that registration is in progress
 8. Documentation of the organization’s indirect cost agreement with the government, if applicable
3. Stage 2 Application
 - a. Stage 2 application materials will also be submitted to www.AgingAndTrauma.org.
 - b. Applicants that advance to this stage will be required to submit the following items, following JFNA’s guidance:
 - i. Explanation of Program and Budget Revisions
 - ii. Revised Budget
 - iii. Revised Work Plan
 - iv. Any additional materials and information JFNA requests
 1. Name, title, and email address of agency CEO

Guidance for Completing the Application and Templates

Note: Character count *includes* spaces. (To check your character count with spaces, visit <https://charactercounttool.com>)

1. Questionnaire (200 total points)
 - a. **Program Participants** (20 points)

- i. Describe the organization's history of serving the proposed program participants, including services currently provided to the population and how many are currently being served. (10 points, 1500 characters)
 - ii. Describe the unmet needs of the proposed program participants as it relates to their (or their care recipients') history of trauma. The proposed program participants should be the same as what is identified in the Basic Information part of the online form. (10 points, 1500 characters)
- b. Program Overview and Details (130 points)**
- i. Provide a brief program summary, including program goals, number of proposed participants in Year 1 and Year 2 of the grant, rationale, and strategy for creating a program with the selected number of proposed program participants. The goals should match the goals described in the Work Plan. (20 points, 2500 characters)
 - ii. Describe proposed program activities, such as classes, trainings, events, case management, etc. that will be held in Year 1 and Year 2 of the grant, including how many will take place in each program year. Please ensure this information is reflected in the Work Plan. (20 points, 2500 characters)
 - iii. Explain how the proposed services and programs would be innovative, different from, or expand the services currently provided by the organization to the proposed program participants, including how they address the unmet needs of proposed program participants based on their (or their care recipients) history of trauma (10 points, 1500 characters)
 - iv. Explain the organization's strategy to include program participants in the planning and implementation of the proposed services and programs. (10 points, 750 characters)
 - v. Explain how the proposed services and programs will incorporate the PCTI approach. (20 points, 2000 characters)
 - vi. Describe the observable, expected outcomes of the program on program participants (15 points, 1500 characters)
 - vii. Describe the organization's plan to evaluate the proposed program (including its impact on participants) and the resources available (e.g. staff time, technology) to implement the evaluation plan. (15 points, 2000 characters)
 - viii. Describe the staffing, administrative support, technologies, financial resource management, and other infrastructure capabilities the organization has available to meet the requirements of the grant. Specify which staff members and positions will be responsible for carrying out which grant-related responsibilities, including if anyone will be hired for this grant and the correlating expected Full Time Employment calculation for each position. Please ensure this information is reflected in the Work Plan. (20 points, 2000 characters)

1. **This question is only required if applicant proposes to work with sub-subgrantee(s).* Indicate the roles and responsibilities of each entity and how, together, these roles provide a cohesive strategy for implementing the proposed program. Explain how the subgrantee will monitor funds of the sub-subgrantee. Describe how knowledge of PCTI care will be transferred to or from the subgrantee and the sub-subgrantee. Explain the communications strategy, including the frequency and mode of communication between the entities. Indicate whether the sub-subgrantee(s) has already agreed to the partnership.
(0 points, 2000 characters)

c. Sustainability and Dissemination (50 points)

- i. Specify the organization's plan to meet the required minimum matching funds. Explain how the strategy is feasible and realistic. (10 points, 1500 characters)
- ii. Explain the organization's plan to infuse the principles of PCTI care into overall organizational functioning. (10 points, 1500 characters)
- iii. Explain the organization's plan to disseminate lessons learned from the grant to the broader aging services network (10 points, 1500 characters)
- iv. Explain the organization's strategy to sustain the program after the grant period ends. (10 points, 1500 characters)
- v. Explain how the organization will prevent negative impacts on program participants after the grant period ends. (10 points, 1500 characters)

2. Budget (35 points)

(Note: This guidance is best utilized when read in combination with the provided Budget template.)

- a. Submit a proposed budget using the template provided. **Only budgets submitted on this template will be reviewed.**
 - i. This budget should encompass a two-year programmatic budget, covering the period of **March 1, 2022 through February 28, 2023 and from March 1, 2023 through February 29, 2024.**
 - ii. List the amount of JFNA funds proposed, the applicant's minimum match required, and the total program budget for each year.
 - iii. If there is Overmatch, the Overmatch should be reflected on a separate line and not counted in the total program budget.
 - iv. Income must equal expenses in the total program budget.
 - v. Applicants should add lines for additional revenue sources and costs as needed. All values should be entered in the white boxes on the budget template.
- b. Budget Scoring:
 - i. A budget for this grant program must have the following characteristics:
 1. Expenses and revenue equal each other (10 points)
 2. Requested amount and line items match the budget narrative (5 points)

3. Budget is reasonable to meet the goals proposed in the application (20 points)
- c. Applicant's budget should include:
- i. Program Revenue, Proposed Award from JFNA
 - ii. Program Revenue, Financial Contributions (for example, listed by source):
 1. Agency Support
 2. Jewish Federation Grants
 3. State Government Grants
 4. Local Government Grants
 5. Foundation Grants
 6. Individual Contributions
 - iii. Program Revenue, In Kind Contributions (for example):
 1. Staff (total salary and wages, with fringe benefits included, full or part-time)
 2. Consultants (non-staff)
 3. Volunteer Hours (value is \$28.54 per hr)
 4. Program Event Space
 5. Office Space
 6. Office Supplies
 7. Donations (e.g. clothing, household goods, technology, etc.)
 - iv. Projected Overmatch Funds (if applicable)
 - v. Program Expenses (for example):
 1. Staff (break down staff wages, one line item per position, being sure to indicate FTE next to their title)
 2. Fringe benefits
 3. Consultants (non- staff)
 4. JFNA Training Workshop Expenses for 2023 (up to \$2,500)
 5. Other trainings related to aging or trauma
 6. Event space
 7. Food and beverages
 8. Activity supplies
 9. Technology for use by program participants
 10. Technology for use by program staff
 11. Entertainment
 12. Marketing for program outreach and events
 13. Printing and copying for outreach and events
 14. Website creation and/or maintenance related to the proposed program
 15. Staff travel for service delivery
 16. Transportation for program participants
 17. Contractual (such as outsourced congregate meal program or third-party home health aides)

vi. Overhead Expenses:

1. Rental costs for office space (excluding the cost of short-term rentals for event space for program-related activities)
2. Costs of operating and maintaining facilities
3. General administration
4. General expenses such as salaries and expenses of executive officers, personnel administration, accounting and office equipment and supplies.
 - a. Overhead **does not** include cellular phones or computers that are specifically dedicated to the program.
 - b. **Overhead may not exceed 10% of total program budget** (JFNA grant + minimum match).

3. Budget Narrative (30 points)

(Note: This guidance is best utilized when read in combination with the Budget Narrative section in the application portal.)

- a. The budget narrative explains the rationale of the organization's proposed budget, including program revenue sources and program expenses. 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.**

i. Budget Narrative Scoring

1. The budget narrative for this grant should include the following characteristics:
 - a. A feasible and realistic explanation of funding sources for each financial contribution indicated on the budget (5 points)
 - b. All information about program staffing, including a listing by position, all full or part-time employees dedicated to this program, and whether these constitute existing or new staff for the organization (10 points)
 - c. A list and explanation of the costs associated with activities, events, classes, communication, and meetings (10 points)
 - d. The program costs in the budget correlate with the program tasks in the Work Plan (5 points)

ii. Program Revenue

1. Financial Contributions: Include an explanation of each funding source and whether that funding is secured, in process, or anticipated.
2. In-Kind Contributions: List all in-kind/non-monetary contributions the organization anticipates receiving and using for this program. Include a breakdown of the fair market 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 \$28.54 = value of in-kind contribution.

iii. Program Expenses

1. Personnel: List all personnel supported by the JFNA grant, including staff members and consultants (excluding homecare aides). Type 'staff' or 'consultant' to indicate who is filling the position. Type 'current' or 'future' to differentiate between personnel who are currently employed by the organization and future hires. Enter the percent of FTE, the annual salary, and the budgeted amount.
2. Training Workshop: JFNA requires subgrantee participation in each Training Workshop. There will not be a Training Workshop in 2022, and the next Training Workshop will be in 2023. Include the breakdown costs of staff travel to the JFNA Training Workshop. For this purpose, estimate costs of travel, local transportation, lodging, and three meals for two days and two nights, including a maximum cost of \$2,500. Subgrantees may send as many staff to the Training Workshops as they wish within the \$2,500 allowable budget. Any charges above \$2,500 cannot be charged to the JFNA subgrant.
3. 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:
 - a. Event space
 - b. Food and beverages
 - c. Activity supplies and materials
 - d. Technology for program participants
 - e. Entertainment
 - f. Marketing for program outreach and events
 - g. Printing and copying
 - h. Website related to the proposed program
 - i. Staff transportation for service delivery
 - j. Transportation for proposed program participants if travel is part of this program
 - k. Contractual (such as outsourced meal program or third-party home health aides)
4. Overhead: Define each item and its cost/rate below. Please indicate if the organization has an indirect cost agreement with the federal government. If applicable, documentation of the

indirect cost agreement should be uploaded in the Financial Documentation section of the application portal.

4. Work Plan (35 points)

(Note: This guidance is best utilized when read in combination with the provided Work Plan template.) [Click here for a sample work plan.](#)

a. Work Plan Definitions:

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

b. Work Plan Scoring

- i. The work plan for this grant should include the following characteristics:
 1. Clear program goals (5 points)
 2. Measurable program outcomes (5 points)
 3. Reasonable objectives and tasks (5 points)
 4. Reasonable timeframes (5 points)
 5. Feasible and realistic amount of work required for each staff member (10 points)
 6. Program implementation will begin by January 1, 2022 (5 points)

c. Using the template provided, create a Work Plan for each program goal:

- i. Fill out the first page of the template, listing every goal of the program.
- ii. Complete a separate chart for each goal.
- iii. List the goal and measurable outcome at the top of the chart.
- iv. 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.
- v. In the column titled "Lead Person(s)," note the job title of the individual who will take the lead on accomplishing the task.
- vi. 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.
- vii. Create a key, listing each staff position entered in the Work Plan and its associated abbreviation (e.g. SVP = Senior Vice President, CM = Case Manager).