

REQUEST FOR PROPOSALS AND PROGRAM GUIDELINES

INNOVATIONS PROGRAM

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

February 2, 2023



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1. GRANT OVERVIEW

1.1 BACKGROUND

1. In 2020, The Jewish Federations of North America (JFNA) received a five-year grant, pending Congressional appropriations, from the U.S. Department of Health and Human Services, Administration for Community Living/Administration on Aging (ACL), called *Expanding the National Capacity for Person-Centered, Trauma-Informed Care: Services 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 agency programs, policies, and procedures.
2. The grant mission is to expand the nation's capacity to provide PCTI services for Holocaust survivors, older adults with a history of trauma, and their family caregivers (**Service Populations**). The ACL grant goals are to fund and support subgrantees to develop PCTI programs for the Service Populations and increase the knowledge and skills of aging service providers to implement PCTI care.
3. JFNA's first five-year grant from ACL was awarded in 2015 to advance PCTI supportive services for Holocaust survivors and their family caregivers. JFNA is using the lessons learned from that previous grant to expand PCTI support for Holocaust survivors and other diverse older populations.
4. Under the Innovations Program, the JFNA Center on Holocaust Survivor Care and Institute on Aging and Trauma (**Center**) uses grant and philanthropic funds to award subgrants.
5. Subgrantees in this RFP cycle will comprise the "Innovations Program - Grapevine Cohort" and will join prior cohorts as leaders in PCTI care.
6. The Innovations Program offers subgrantees the following opportunities:
 - a. Serve more Holocaust survivors, older adults with a history of trauma, and their family caregivers using the PCTI approach;
 - b. Earn recognition as leaders in aging services and trauma-informed care by sharing promising practices on providing PCTI care on a national level; and
 - c. Develop partnerships with agencies working with older populations with a history of trauma and their family caregivers.

1.2 REQUEST FOR PROPOSALS

1. The Center seeks applications from service agencies across the United States to develop innovative PCTI projects for Holocaust survivors, older adults with a history of trauma, and their family caregivers.
 - a. **Innovation** is defined as the introduction of something new. This includes developing or incorporating new projects. A project that meets any of the following criteria could be considered innovative:
 - i. New to the area
 - ii. Serves an unmet community need
 - iii. Solves a problem in a new way
 - iv. Utilizes a new service delivery method

- v. JFNA will **not** fund an outright continuation of an existing project without any enhancement. Applicants will be required to detail what is different from existing projects.
 - vi. Projects can be innovative for the field, agency, or program. What is innovative for one agency might not be innovative for another.
- b. New for this RFP, applicants are asked to describe each project that is part of the proposal. A **project** is defined as a set of activities or tasks that must be completed to arrive at a particular outcome or impact. A project could be composed of many tasks and multiple Service Populations.
 - i. For example, a chair yoga project could be composed of many tasks such as recruiting participants, training staff in PCTI care, providing chair yoga sessions, and conducting an evaluation of project outcomes. The outcome may be to improve physical health.
 - ii. To determine the number of projects in the proposal, consider how many interventions are included. An intervention is a method or process to prevent harm or improve functioning. For example, a group therapy project with the outcome of reduced anxiety could include three activities such as a morning session of group therapy, an afternoon session of group therapy, and a weekend session of group therapy. These three activities would be considered one project, as they are different formats of the same intervention. In contrast, an individual counseling project and a support group project may both have the same outcome of reduced anxiety, but these are two different interventions and therefore considered two projects.
 - iii. Applicants may propose one to five projects within one application. The number of projects will not influence the proposal's score.
 - iv. Applicants shall describe in detail each individual project and its corresponding budget.
 - v. Not all projects in an application are guaranteed to be funded.
- 2. The RFP process will be competitive. Not all applications will receive funding, and those that do may not receive the full amount requested.
- 3. Applicants may submit proposals requesting between **\$45,000 to \$300,000 per year**.
- 4. **Applicants should consider this a two-year program and propose a two-year budget. JFNA can only commit to fund subgrantees in Program Year 1 (January 1, 2024-December 31, 2024).** Pending Congressional appropriations, compliance with all program requirements, and the success of the subgrantee's projects, JFNA intends to award the same amount of funding in Program Year 2 (January 1, 2025 – December 31, 2025) as awarded in Program Year 1.
- 5. Applicants may propose serving multiple Service Populations through one application. The application must include detailed information about the needs and proposed services for each Service Population.
- 6. Applicants awarded funds for approved projects may not change or create new projects with awarded funds during the tenure of the grant without the expressed written consent of JFNA. Failure to comply with this requirement will result in termination of the award, reimbursement of unused awarded funds, and reimbursement of awarded funds for unapproved projects.
- 7. COVID-19 Pandemic Considerations
 - a. Applicants must be able to operate proposed projects safely in a COVID-19 environment. Proposals must follow Centers for Disease Control (CDC) guidelines or local government requirements.

- b. 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.

1.3 ELIGIBILITY

1. JFNA aims to fund agencies representing a diverse cross-section of the U.S. including urban, rural, suburban, and tribal communities; varied English-language abilities; and underserved and minority communities. Examples of eligible agencies include:
 - a. Domestic public or private non-profit entities
 - b. State and local governments
 - c. Indian tribal governments and organizations (American Indian/Alaskan Native/Hawaiian Native/Native American)
 - d. Faith-based organizations
 - e. Community-based organizations
 - f. Hospitals
 - g. Institutions of higher education
2. To be eligible to apply, agencies must submit an Intent to Apply at www.AgingAndTrauma.org and be:
 - a. A direct service provider to populations that include but are not limited to the Service Population(s).
 - b. An entity with at least one audit report that includes a management letter, consolidated statements of activities, functional expenses, and cash flow.
 - c. Based in the United States.
 - d. Registered in SAM and have a Unique Entity Identifier (UEI) number by the time funding is disbursed. For more information, see Section 3.3 Compliance with Federal Statutory Authority and Provisions.
3. Agencies currently receiving JFNA funds through the Center are eligible; however, a new application must be for a new project or a deepening or expansion of an existing project.
4. Some applications may involve sub-subgrantees. For the purposes of this grant, JFNA is the grantee of the federal government. Agencies that receive grants from JFNA are **subgrantees**. Agencies that receive funding through JFNA subgrantees to carry out grant activities are **sub-subgrantees**.
 - a. Subgrantees are the main applicants and apply on behalf of sub-subgrantees, when applicable.
 - b. Subgrantees are responsible for controlling the funds, managing grant implementation, providing programmatic and financial oversight, completing and submitting reports, and participating in required check-in calls and trainings.
 - c. Subgrantees may pay or reimburse sub-subgrantees for staff salaries and specific project activities as costs are incurred.
 - d. A sub-subgrantee is not a contractor or vendor. For example, if a subgrantee partners with and funds an agency that specializes in providing art therapy to older adults, this relationship would be a sub-subgrantee relationship. However, 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.

- e. An agency may not apply for funding in more than one application for this RFP.
- f. Sub-subgrantees must meet the same eligibility requirements as subgrantees.
- g. Subgrantees and sub-sub grantees are all held to the same requirements for use of federal funds.
- h. The relationship between the subgrantee and the sub-subgrantee must be stated clearly in the application.
- i. Prior to applying, the subgrantee and sub-subgrantee should have already agreed to work together on the proposed project, if funded. If an application including a sub-subgrantee(s) advances to the second stage of the application process, the sub-subgrantee(s) will be required to submit letters confirming their participation in the program.
- j. Applicants that apply as a subgrantee may not appear on another application as a sub-subgrantee.

1.4 PERSON-CENTERED, TRAUMA-INFORMED (PCTI) REQUIREMENTS AND RESOURCES

1. Programming supported by this grant must include methods of delivering PCTI care.
2. While expanding PCTI services, agencies are encouraged to incorporate the principles of PCTI care into other aspects of organizational operations. This aids in sustainability of the grant-funded projects, encourages a PCTI workplace and program culture, and promotes organizational support for the PCTI framework.
 - a. Applicants are encouraged to review the following resources.
 - i. Center <http://www.agingandtrauma.org/>, which has webinars, publications, trainings, guides and factsheets on aging, trauma, and PCTI care: <https://holocaustsurvivorcare.jewishfederations.org/resources>
 - ii. The Substance Abuse and Mental Health Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach, which is the basis of PCTI care: https://ncsacw.acf.hhs.gov/userfiles/files/SAMHSA_Trauma.pdf
 - iii. The Administration for Children & Families' Resource Guide to Trauma-Informed Services: <https://www.acf.hhs.gov/trauma-toolkit>
 - iv. Contact JFNA's past and present subgrantees: <https://holocaustsurvivorcare.jewishfederations.org/our-subgrantees>.
 - b. To provide a transparent application process, JFNA is unable to coach applicants with brainstorming proposal topics.

1.5 SERVICE CATEGORIES

1. Applicants may propose projects for a diverse array of services. Outreach may be funded as part of the project to assist in program success. Services categories include, but are not limited to, the following examples:
 - a. **Physical Health.** Services designed to promote physical health and well-being. Services may include wellness programs, meals, falls prevention and home modifications, homecare, chronic disease management, medication management, and health education programs. Outcomes may include improved health and well-being, decreased falls, increased understanding of self-care strategies, and improved nutritional intake.

- b. **Mental Health.** Services designed to promote mental and emotional health. Services may include individual and group counseling, support groups, creative arts projects, pet therapy, and education and training projects. Outcomes may include decreases in depression, anxiety, and feelings of loneliness.
- c. **Social Health.** Services designed to promote social health and well-being. Services may be virtual, in-person, or hybrid and may include gatherings, technology training, educational programs, field trips, discussion groups, and friendly visitor programs. Outcomes may include decreased social isolation and increased social support.
- d. **Cognitive Health.** Services designed to promote cognitive health and well-being. Services may include memory support programs and programs designed to reduce anxiety and agitation in people with Alzheimer's disease or other cognitive impairments. Outcomes may include improved cognitive functioning, improved mood, and decreased agitation and anxiety.
- e. **Access to Community Resources.** Services designed to promote access to community-based resources to promote well-being. Service may include social services, case management, transportation and transportation vouchers, legal assistance, benefits counseling and eligibility assistance, and participation in community service, civic engagement, or social justice activities. Outcomes may include increased understanding and utilization of social and legal services, and acquisition of benefits.
- f. **Financial Health.** Services designed to promote financial health and well-being. Services may include financial training and planning, or scam or financial abuse prevention. Outcomes may include improved financial stability, confidence in making financial decisions, increased ability to age in place, and reduced stress and anxiety associated with financial concerns.
- g. **Family Caregiving.** Services designed to promote physical, emotional, financial, and social health and well-being of family members and friends who currently care for older adults. Services may include caregiver assessment with follow-up services, counseling and support groups, information and referral, case management, respite, education, and training. Outcomes may include improved self-reported health and well-being, a strengthened support system, increased understanding of self-care strategies, and decreased feelings of anxiety, stress, and isolation.

1.6 ELIGIBLE POPULATIONS

1. **Service Populations.** At least one project in the application must benefit the Service Populations. Service Populations are defined below.
 - a. **Holocaust Survivor.** According to the [US Holocaust Memorial Museum](#), Holocaust survivors are Jews who experienced the persecution and survived the mass murder that was carried out by the Nazis and their collaborators between 1933 and 1945. This included those who were in concentration camps, killing centers, ghettos, and prisons, as well as refugees or those in hiding. Holocaust survivors also include people who did not self-identify as Jewish but were categorized as such by the perpetrators. The definitions of Jewish Nazi victim used by the Claims Conference and the German Government are also acceptable definitions for Holocaust survivors under this grant, and there may be other definitions. The U.S. Government does not limit services under this grant to any of these definitions; however, individuals born after February 1946 are not considered Holocaust survivors under this grant.

- b. **Older Adult with a History of Trauma.** An older adult is a person who is age 60 or over, in accordance with the Older Americans Act (OAA). There is no singular definition of trauma. 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."
 - c. **Family Caregiver.** For this grant, a family caregiver is a family member, partner, or friend who assists an older adult with a chronic, disabling health condition. Family caregivers may be served by this grant if they are currently caregivers to an older adult with a history of trauma. The services must support their role as caregivers.
- 2. **Supporters of Service Populations.** Projects in the application may also benefit Supporters of Service Populations. Supporters of Service Populations are defined below.
 - a. **Professional Service Provider.** An individual who is paid to provide professional services is a professional service provider. This may include case managers, social workers, program managers, medical staff, legal staff, registered nurses, doctors, or certified nursing assistants, who may be internal or external to the agency receiving grant funding.
 - b. **Volunteer.** An individual working in an unpaid position to provide services. This may include a volunteer for a friendly visitor program, meal delivery, or companionship.

2. FUNDING AWARDS

2.1 AWARD AMOUNTS

1. JFNA will award grants between **\$45,000 to \$300,000 for each Program Year**.
2. JFNA will determine the number of grant awards based on the number of applications, funding-level requests, and the quality of applications.
3. Awards include money from the federal government and JFNA's national fundraising efforts.
4. Applicants should consider this a two-year program and propose a two-year budget, although JFNA can only commit to fund subgrantees in Program Year 1 until Congressional appropriations are known.
5. This RFP process is competitive. Not all applications will receive funding, and those that do may not receive the full amount requested.
6. Do not inflate budget requests as a precaution for a possible reduced funding award. The Review Committee and Center staff reviews budgets carefully to ensure budgets are reasonable and feasible.

2.2 FUNDING LIMITATIONS

1. Funding may **not** be used for:
 - a. The development of PCTI training materials **without a direct service component** to the project. Training Supporters of Service Populations in and of itself is not considered a direct service to the Service Population.
 - b. Providing services or counseling to Supporters of Service Populations **without a direct service component** to the Service Populations.

- c. Projects only consisting of a needs assessment **without a direct service component**.
- d. Services for public education **without a direct service component** for the Service Populations. For example, recording testimony for the sole benefit of educating the community is prohibited, but the creation of a legacy project that benefits older adults with a history of trauma is allowable.
- e. Continuation of existing projects without expansion or new and innovative approaches in PCTI care.
- f. 'Double dipping' or coverage of the exact same expenses such as staff, consultants, event space, and/or programming that are also covered by other grants from JFNA or elsewhere.
- g. Institutional care, including costs associated with staying in a nursing home, residential care, or assisted living facility. However, subgrantees may fund innovative PCTI services provided in those facilities.
- h. Income maintenance. Income maintenance does not include gift cards or grocery cards that have clear documentation of the purpose and services provided.
- i. Religious instruction. Limitations on religious activities can be found here: <https://cdn.fedweb.org/fed-42/2/Religious%2520Guidance%252012.29.21.pdf>. Chaplaincy programs that abide by these guidelines are allowable.
- j. Meals for Supporters of Service Populations. Limitations on grant funds for meals can be found here. <https://cdn.fedweb.org/fed-42/2/Grant%2520Funding%2520For%2520Meals%2520Last%2520Updated%252019Mar%202018.pdf>.
- k. Expenses related to attendance at trainings, conferences, or professional development activities unrelated to this JFNA-funded program.
- l. The production of materials or tools to be licensed or sold. JFNA, subgrantees, and sub-subgrantees agree to grant each other rights to publish and use all materials developed in connection with the grant.
- m. Basic research (ex. scientific or medical experiments). Basic research is study and experimentation for the purpose of greater understanding of phenomena or observable facts without a direct services component. If a proposal includes research as a component of direct service provision, this research is allowable. This may include a needs assessment to understand the method in which to provide direct services. Additionally, this can include scientific evaluation of the impact of direct services on participants.
- n. Construction or rehabilitation of buildings.
- o. 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. Office equipment such as furniture or copy machines are not allowable. 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.
- p. Insurance, including but not limited to general and liability insurance, as well as auto and bus insurance.
- q. Transportation costs that are unrelated to the funded project, and repairs for automobiles, buses, etc. owned by the Service Populations, staff, an external vendor, and/or the agency.
- r. Endowments, capital campaigns, fundraising, or fundraising professionals not working on this grant.

- s. Publication subsidies and advertising costs for general agency operations unrelated to this program.
- t. Lobbying or political activities.
- u. Internal or external fees and expenses related to Human Resources.
- v. Audit fees and expenses.
- w. Professional fees.

2.3 MATCH REQUIREMENTS

1. **Subgrantees are required to contribute a minimum match equal to 25% of the total grant budget.** The minimum match is calculated by dividing JFNA funds requested by 3.
2. Subgrantees are responsible for raising minimum matches in both Program Year 1 and 2, if Year 2 funding is available.
 - a. **By June 30, 2024, and by June 30, 2025**, subgrantees must demonstrate to JFNA receipt of all financial match funds and a specific commitment plan for all in-kind contributions for Year 1 and Year 2, respectively.
 - b. If subgrantees cannot demonstrate the required minimum match by June 30, 2024, funding for Program Year 2 may not be issued.
3. Matching funds for this grant are subject to the same requirements as government funds awarded by JFNA.
4. The match may be comprised of financial contributions (cash or grants), in-kind contributions (goods, services, or time), or both.
5. Applications must detail the sources of the expected match. Possible sources of the match may include, but are not limited to:
 - a. Financial contributions, including support from state or local government, foundations, individual donors, corporate donors, local Jewish Federation grants, the Claims Conference, and KAVOD SHEF.
 - b. In-kind contributions, including staff and volunteer time, donated goods, program space, and office space.
6. Funds can only be included as match if the following conditions are met:
 - a. Match funding must be applied to the same population served by the JFNA funded projects; and
 - b. Match funding must be used for the same purpose as the JFNA funded projects;
7. Match funding may not be used for other subgrantee programs.
8. The following sources **cannot** be used toward the JFNA match:
 - a. Federal funds.
 - b. Funds used to match other grants.
 - c. Funds received from JFNA, such as the Center's Expanded Critical Supports Program or JFNA's contributions to KAVOD SHEF grants (e.g., the KAVOD SHEF outreach grants or the match contribution).
9. **Overmatch** is defined as funds raised beyond the minimum match requirement.
 - a. Overmatch funds may be used for additional programming or overhead expenses related to this program. They can also cover expenses beyond what is allowable by the grant (such as insurance related to the program).

- b. Overmatch funds should be explained in the Budget Questionnaire, Budget Narrative, and Budget Template.
- c. JFNA does not favor applications that show overmatch; however, if proposed projects require overmatch for implementation, the subgrantee should explain how all projects would be financially covered.

3. EXPECTATIONS, REPORTING, AND COMPLIANCE

3.1 EXPECTATIONS OF SUBGRANTEES

1. Begin implementation of the proposed program by **January 1, 2024**. **Implementation** is defined as initiating program launch, but not necessarily service delivery.
2. Plan to spend the total program budget, which includes JFNA grant funds and matching funds, by the end of Program Year 2.
3. Explore ways to sustain their projects beyond the grant period. This includes sharing knowledge gained through participation in this grant program with others so that PCTI care becomes the accepted strategy for serving older adults. Part of sustainability is dissemination of program materials and innovations through conferences, online resources, publications, and other venues.
4. Join a community of practice and are required to participate in the technical support activities associated with the Center including:
 - a. Quarterly meetings to check-in on program development.
 - b. Evaluation of JFNA-funded PCTI projects in consultation with Center staff.
 - c. Webinars on topics related to the Service Populations; the program, financial, and evaluation components of the grant; and the PCTI approach.
 - d. JFNA Training Workshop.
 - e. Site visit(s), if convened by Center staff.
 - f. Serving as a peer mentor and a thought leader in the field of PCTI care by sharing best practices and lessons learned with other subgrantees and aging service providers.
5. Sign a Cooperative Agreement with JFNA.

3.2 REPORTING REQUIREMENTS

1. Subgrantees are required to submit the following reports reflecting data collected and analyzed from each approved project.
 - a. Quarterly Financial Workbook, which includes the Financial Reporting Form, Evidence of Match Form, and Budget Modification Request (as needed)
 - b. Quarterly Program Participant Report
 - c. Semiannual Programmatic Report
 - d. Annual Work Plan (as needed)
 - e. Program Evaluation Update Report
 - f. Annual Evaluation Report
 - g. Annual Technical Support Survey
 - h. End of Program Summary Report
 - i. Programmatic Modification Request (as needed)
 - j. Updated Financial Documentation
 - k. Other forms created or modified during the grant period

3.3 COMPLIANCE WITH FEDERAL STATUTORY AUTHORITY AND PROVISIONS

1. JFNA funds the Innovations Program 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).
2. The funds awarded in response to this RFP will include federal funds. The recipients of awarded funds must 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 are subject to the general provisions of 45 CFR Part 75, specifically 45 CFR §75.351 and §75.352, found [here](#).
3. SAM Registration and Unique Entity ID (UEI)
 - a. Subgrantees and sub-subgrantees must register in SAM and have a Unique Entity ID (UEI) number by the time funding is disbursed.
 - b. In the Federal System for Award Management (SAM) registration, the applicant agency is referred to as an “Entity”. To access SAM.gov, an entity is required to have a Login.gov account. Entities can create an account by clicking [here](#).
 - c. Subgrantees must register in SAM and renew their SAM registration annually. It is **free of charge** to register and maintain an entity registration record in SAM. Please click [here](#) for more information.
 - d. **Transition of DUNS to UEI.** Beginning April 4, 2022, the DUNS number requirement terminated and the Unique Entity Identifier or Unique Entity ID, known as the UEI, was implemented as the means for an entity to be identified and validated to conduct business with the US Government.
 - e. The Unique Entity ID is assigned automatically to entities when they request a Unique Entity ID or register on SAM.gov. Existing registered entities can find their Unique Entity ID by following the steps [here](#).
 - f. The disbursement of any portion of the grant is subject to the condition that the Subgrantee must have a Unique Entity ID (UEI) number issued via www.SAM.gov as well as a valid registration on www.SAM.gov. For more information, click [here](#).

4. APPLICATION AND REVIEW PROCESS

4.1 APPLICATION TIMELINE

Dates	Application Process
Thursday, February 9, 2023	Informational Session
Thursday, February 16, 2023	Intent to Apply Due
Friday, February 24, 2023	Last date to ask Clarifying Questions about the RFP
Monday, April 17, 2023	Stage 1 Application Due
September 2023	Notification of Advancement to Stage 2
October 2023	Stage 2 Application Due
November 2023	Awards Announced
November 2023	Signed Cooperative Agreement Due
Monday, January 1, 2024	Program Start Date
January 1-12, 2024	JFNA Wires First Installment of Funds

4.2 APPLICATION PROCESS

- 1. Informational Session.** Applicants are encouraged to participate in the optional Info Session, which includes reviewing the RFP and Program Guidelines and a live question and answer period. Questions sent in advance to Aging@JewishFederations.org will receive priority. Following the Informational Session, applicants may submit clarifying questions via email until the date specified above.
 - a. Call date: **Thursday, February 9, 2023 at 1:00pm – 2:15pm ET**
 - i. Zoom Link: <https://zoom.us/j/97286785849>
 - b. The session will be recorded and posted on the Call for Applications page of the Center's website. The Call for Applications page will also include answers to Clarifying Questions that are not covered in the RFP. The Center will not provide an opinion on application ideas.
- 2. Intent to Apply.** Applicants must complete an Intent to Apply to be eligible to submit a full application. In the application portal, the Intent to Apply is known as the LOI. JFNA uses this information to confirm eligibility and to estimate the number of Review Committee members needed. Submit the Intent to Apply at www.AgingAndTrauma.org.
 - a. The Intent to Apply includes:
 - i. Full legal agency name and address
 - ii. Applicant's contact name, title, email address, and phone number
 - iii. Eligibility questions. Applicants that respond "No" to any of the following questions will be ineligible to apply:
 1. Is your agency based in the United States? (Yes, No)
 2. Does your agency fit into one of the following categories?: Domestic public or private non-profit entities including state and local governments, Indian tribal governments and organizations (American Indian/Alaskan Native/Hawaiian Native/Native American), faith-based organizations, community-based organizations, hospitals, and institutions of higher education (Yes, No)

3. Is your agency an entity with at least one audit report that includes a management letter, consolidated statement of activities, functional expenses, and cash flow? (Yes, No)
 4. Is your agency a direct service provider to populations that include, but are not limited to the Service Population(s)? The Service Populations include Holocaust survivors, older adults with a history of trauma, and family caregivers. (Yes, No)
 5. Will your organization take steps to be registered in SAM and obtain a Unique Entity Identifier (UEI) number by the time your application is submitted? (Yes, No)
- b. Following submission of the Intent to Apply, applicants will receive a confirmation email.
3. **Stage 1.** Applicants submit a completed application, including Questionnaire, Work Plan, Budget Workbook, and Financial Documentation. The Review Committee scores completed applications.
 4. **Stage 2.** Based on the Review Committee's scores and, if applicable, applicants' past compliance with Center grants, the Center notifies applicants whether the application has advanced to Stage 2. The Center offers guidance to help applicants modify their proposals to meet available funding and fit within the guidelines of the grant. During Stage 2, applicants must submit the Stage 2 Application Questionnaire, Stage 2 Budget Workbook, Stage 2 Work Plan, and Banking Information.
 5. **Award Letter.** Based on the quality of the Stage 2 submission, the Center sends an award letter and Cooperative Agreement to successful applicants.
 6. **Cooperative Agreement.** The Cooperative Agreement is a binding contract between JFNA and the applicant and must be signed before funding is released.
 7. **Program Start Date.** Program Year 1 implementation begins.
 8. **Funds Wired.** JFNA will wire the first installment of grant funds.

4.3 APPLICATION SECTIONS

1. The Application contains the following components which must be completed on the provided templates.
 - a. Basic Information
 - i. Use this sample executive summary as a guide for drafting the executive summary for this grant application: *"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 is to improve participants' social health. The measurable objectives are to have three 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 two refugees 16 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."*

- b. Program Questionnaire
- c. Work Plan
- d. Budget Application Workbook, including:
 - i. Budget Questionnaire
 - ii. Budget Template
 - iii. Budget Narrative
- e. Financial Documentation
 - i. Entire agency budget for current fiscal year
 - ii. Entire agency budget for most recent completed fiscal year
 - iii. Independent Audit Letter (Management Letter)
 - iv. Most recent agency audit report that includes a management letter, consolidated statements of activities, functional expenses, and cash flow, clearly identified by fiscal year in the file name
 - v. Agency Single Audit (also known as Subpart F or A-133), if applicable, clearly identified by fiscal year in the file name
 - vi. A copy of the agency's current IRS tax-exempt status determination letter or most current Form 990, or Certificate of Incorporation or equivalent document for qualified religious agencies not required to file Forms 990 and 1023
 - vii. SAM registration confirmation or verification registration is in progress, and UEI number
 - viii. Copy of the agency's indirect cost agreement with the government, if applicable

4.4 REVIEW PROCESSES

1. JFNA convenes a volunteer Review Committee to review and score applications. The Review Committee is comprised of professionals or lay leaders with knowledge of aging services, diverse older populations with a history of trauma, family caregiving, program planning and evaluation, trauma-informed care, and organizational capacity building.
2. To create a level playing field between applicants with and without prior JFNA grant funding, JFNA will examine applications in two categories. The categories are:
 - a. Agencies that **have** received a grant from the Center's federal grant program, either as a subgrantee or sub-subgrantee, and
 - b. Agencies that **have never** received a grant from the Center's federal grant program either as a subgrantee or as a sub-subgrantee.
3. Applications are evaluated on whether the cumulative proposed application is clear, cohesive, realistic, and likely to result in the stated outcomes.
 - a. 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, average, to excellent. The lowest number of points indicates an insufficient response, and the highest number of points indicates an excellent response.
 - b. The number of projects will not influence the score.
 - c. The score is calculated by dividing the total points earned by the total points possible.
4. Applicants may include supporting letters from community partners or public officials, but these letters will not add points to the score.

5. **Funding decisions are based on application scores; diversity of agency size, Service Population(s), geographic region, and service category; and type of PCTI innovation necessary to create a diverse pool of subgrantees required to meet the overall goals of the Innovations Program. Both agencies that have received a grant from the Center's federal grant program and agencies that have never received a grant from the Center's federal grant program will be funded; and past compliance with prior Center grants will be considered, if applicable.**

5. APPLICATION COMPLETION

1. All components of the application must be completed and submitted via Foundant Technologies, a software program. A tutorial on how to use Foundant can be found here: <https://cdn.fedweb.org/fed-42/2/Grapevine%2520Applicant%2520Tutorial%2520-%2520Foundant%2520-%2520Dec%25206%25202022%2520%25283%2529.pdf>
2. All application materials, including templates, can be found here: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.
3. Applications submitted after the deadline or outside of Foundant will **not** be reviewed, without exception.
4. Submit a complete application at least two business days prior to the deadline to allow time to address technical questions. Technical questions can be addressed to Aging@JewishFederations.org.
5. Ensure all acronyms are written out the first time they are used in each document.
6. Character count includes spaces. (To check character count with spaces, visit <https://charactercounttool.com>)
7. **Before submitting your application, ensure responses and project names are consistent in the Program Questionnaire, Work Plan, and Budget Application Workbook.**

5.1 BASIC INFORMATION

1. The Basic Information section will be accessible to the Review Committee but will not receive a score. This section asks for the following information:
 - a. Contact information for applicant's agency.
 - i. Full Legal Agency Name
 - ii. Agency Address
 - iii. Applicant Contact's Full Name
 - iv. Applicant Contact's E-mail Address
 - v. Applicant Contact's Telephone Number
 - vi. CEO's Name (Including Prefix)
 - vii. CEO's E-mail Address
 - b. Overview.
 - i. Indicate the amount of funds for Year 1 the applicant requests from JFNA. Do not include matching funds.
 - ii. From the drop-down menu, select the number of projects proposed in the application. Refer to Section 1.2 for the definition of project.
 - iii. Does your agency anticipate funding sub-subgrantees as a component of this grant? Refer to Section 1.3 for the definition of sub-subgrantee. (Yes, No)
 - iv. Provide an executive summary of the overall program, including each of the proposed projects. An example can be found in the RFP in Section 4.3. (1,500 characters)
 - v. From the options, select the demographics that best describe the Service Population(s) this application proposes to serve: (African American or Black older adults; American Indian, Alaska Native, or Native Hawaiian older adults; Asian American older adults; crime survivor older adults; disaster survivor older adults; domestic or sexual violence survivor older adults; family caregivers of older adults; first Responder older adults; Holocaust survivors; immigrant or

- refugee older adults; Latin American older adults; LGBTQ+ older adults; older adults with disabilities; veteran older adults; or other)
- vi. Provide a brief overview of the history and mission of your agency. Include a brief overview of the services your agency offers and the population(s) it currently serves. (1,000 characters)
- vii. Select whether the agency has or has not received funding from the Center's federal grant program in the past. Applications will be considered in two separate categories based on the response to this question.
- viii. Does the agency have a SAM registration status? (Yes, No)
- ix. Does the agency have a UEI Number? (Yes, No)
- x. Agency's UEI Number, if applicable.
- xi. Does the agency grant JFNA permission to share this proposal or parts of it with other potential funders or interested parties? (Yes, No)

5.2 PROGRAM QUESTIONNAIRE

1. **Projects.** Questions 1.a. - 1.d. are required for each project. (150 points total)
 - a. List the name of each project. (5 points)
 - i. To name your project(s), select a short phrase that communicates the activity performed. For example, a project that aims to reduce food insecurity could be named "Nutrition Assistance" or "Food Delivery." Project names that do not clearly identify the service, such as "Community Cares," should be avoided. These names are for JFNA reporting and identification, not for marketing. Project names must be the same in all application documents, including the Program Questionnaire, Work Plan, and Budget Application Workbook.
 - b. Project Participants and Need (25 points total)
 - i. Describe the agency's history of aiding the proposed Service Population(s), including services currently provided and the number of people in the Service Population(s) the agency is currently serving. (10 points, 750 characters)
 - ii. Describe how the proposed project serves the unmet needs of the project participants as it relates to their history of trauma. Provide a rationale (citing relevant data) for selecting the Service Population(s). (15 points, 1,000 characters)
 - c. Project Overview and Details (95 points total)
 - i. Indicate the project service category from the options provided. Select as many as necessary. (Physical health, mental health, social health, cognitive health, access to community resources, financial health, family caregiving, other) (5 points)
 - ii. Describe proposed project. Include project activities, such as classes, trainings, events, and case management that will be held in Year 1 and Year 2 of the grant, including the number and frequency of events. Ensure this information is reflected in the Work Plan. (20 points, 2,000 characters)
 - iii. Provide the number of anticipated participants by Service Population, Supporters of Service Population, and program year in the charts. (10 points)

Service Population	Program Year 1	Program Year 2	Total for Program Years 1 and 2
Holocaust Survivors			
Older Adults with a History of Trauma (not Including Holocaust Survivors)			
Family Caregivers			

Supporters of Service Population	Program Year 1	Program Year 2	Total for Program Years 1 and 2
Professional Service Providers			
Volunteers			

- iv. Explain how the agency intends to staff the project. Describe whether the agency will hire new staff or fund existing staff. (15 points, 500 characters)
- v. Explain how the proposed services would be innovative, different from, or expand the services currently provided by the agency to the proposed project participants. Clarify what is new versus existing. (15 points, 1,000 characters)
- vi. Explain how the agency will include project participants in the planning and implementation of the proposed services. (10 points, 500 characters)
- vii. Explain how the proposed project will incorporate the PCTI approach. (20 points, 1,000 characters)
- d. Project Evaluation (25 points total)
 - i. Describe the expected outcomes of the project on participants. The outcomes should match the outcomes described in the Work Plan. Outcomes are the results of the project on participants. For example, an outcome or result of a tea-time socialization project could be an improvement in a participant's degree of social connection. An outcome for a counseling project could be improved participant mental health. (15 points, 250 characters)
 - ii. Describe the agency's plan to evaluate the proposed project outcomes. This can include a description of data collection tools and evaluation questions. (10 points, 750 characters)
- 2. **Sub-subgrantees.** Questions 2.a. - 2.f. are required only for applicants proposing to work with sub-subgrantees. (75 points total)
 - a. Indicate the roles and responsibilities of the subgrantee and sub-subgrantee(s) and how these roles together provide a cohesive strategy for implementing the proposed program. (15 points, 750 characters)
 - b. Explain how the subgrantee will ensure the sub-subgrantee(s) incorporates the PCTI approach. (15 points, 500 characters)

- c. Explain how the subgrantee will monitor the sub-subgrantee's use of JFNA grant funds and ensure the sub-subgrantee is compliant with all JFNA and federal grant requirements. Explain the communications strategy, including the frequency and mode of communication between the entities. Indicate which subgrantee staff will communicate with the sub-subgrantee. (15 points, 500 characters)
 - d. Explain how the information required for JFNA's reporting will be collected from sub-subgrantees. (10 points, 250 characters)
 - e. Describe your agency's capacity to evaluate activities of sub-subgrantees. This may include a description of staff assignments, evaluation resources, or other aspects needed to measure these outcomes. (15 points, 750 characters)
 - f. Describe the anticipated challenges for monitoring sub-subgrantees and plans to address these challenges. (5 points, 250 characters)
- 3. Agency Capacity (40 points total)**
- a. Explain the organizational capacity and infrastructure available to implement all projects. If the project relies on hiring staff, then briefly explain how project activities will be carried out until all positions are filled. (20 points, 750 characters)
 - b. Describe the agency's capacity to evaluate all projects. Explain how the agency will staff evaluation activities, including JFNA evaluation consultations and training, data collection and analysis, and evaluation reporting. This may also include a description of evaluation resources. (20 points, 500 characters)
- 4. Sustainability and Dissemination (35 points)**
- a. Explain the organization's plan to disseminate lessons learned from the grant to the broader aging services network. (5 points, 500 characters)
 - b. Explain the organization's strategy to sustain the program after the grant period ends. Describe the agency's plans to infuse PCTI principles into overall organizational operations, if applicable. (15 points, 1,000 characters)
 - c. Explain how the agency will prevent negative impacts on program participants after the grant period. (15 points, 750 characters)

5.3 WORK PLAN

1. The guidance in this section is best utilized when read in combination with the [Work Plan Template](#) and [Sample Work Plan](#).
2. Work Plan Definitions
 - a. **Project.** A project is a set of activities or tasks that must be completed to arrive at a particular outcome (e.g., support group for family caregivers).
 - b. **Outcome.** A result of a project on participants (e.g., improved mental health among family caregivers).
 - c. **Key Task.** A specific activity required to reach project objectives (e.g., hiring mental health professionals).
 - d. **Major Objective.** Primary desired result of a task that ultimately leads to the accomplishment of the project outcome (e.g., increased agency capacity to provide mental health services to family caregivers).
3. Create a Work Plan for each project following the instructions below:
 - a. Complete the first tab of the template. Use the same project name(s) on all application materials. 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).

- b. Complete a separate Work Plan in subsequent tabs for each project. Work Plan charts for distinct projects are located on tabs two through six. If the application includes fewer than five projects, leave the remaining tabs blank.
 - c. Describe the outcome of each project at the top of the chart.
 - d. Describe the objectives next to the numbered row, and the main tasks under the objectives. Add rows for tasks and objectives as necessary. Delete unnecessary rows.
 - e. In the column titled Lead Person(s), note the job title of the individual who will take the lead on accomplishing the task.
 - f. Projects can begin and end at different times throughout the grant period.
 - g. Indicate the anticipated completion date(s) for the tasks by completing the black box(es) corresponding with the month(s) when the tasks will be addressed.
4. **Work Plan Scoring**
- a. The Work Plan is worth 100 points and is scored on the following:
 - i. Work Plans are completed on separate tabs for **each** project. (20 points)
 - ii. The project name(s) are consistent with those listed on the Application Questionnaire and Budget Application Workbook. (5 points)
 - iii. Project outcomes are clear and measurable. (15 points)
 - iv. Objectives and tasks are reasonable. (15 points)
 - v. Timeframes are reasonable. (20 points)
 - vi. The amount of work required for each staff member is feasible and realistic. (15 points)
 - vii. Grant implementation will begin by January 1, 2024. (10 points)

5.4 BUDGET APPLICATION WORKBOOK

1. This guidance is best utilized when read in conjunction with the [Budget Application Workbook](#), comprised of the following eight documents: 1) Budget Questionnaire (tab 1), 2) Master Budget (tab 2), 3) five Project Budgets (tabs 3 – 7), and 4) Budget Narrative (tab 8).
2. The Budget Questionnaire, Master Budget, a minimum of one Project Budget, and the Budget Narrative must be filled out for the applicant's Budget Application Workbook to be considered complete.
3. **The Budget Application Workbook must be completed in Excel and uploaded in both Excel and PDF formats.** No other budget formats shall be accepted.
4. Read the detailed instructions on each tab in the Budget Application Workbook before completing each document.
5. Draft a two-year program budget covering the period of January 1, 2024 – December 31, 2024 (Program Year 1) and January 1, 2025 – December 31, 2025 (Program Year 2) using the Budget Application Workbook. Budget numbers must be rounded to the nearest dollar.
6. A maximum of five projects are permitted. Itemize each expense needed to implement the proposed project(s). Expenses should be reasonable. Do not overestimate costs or needs.
Income must equal expenses.
7. Applicants must list the required minimum matching funds of financial and/or in-kind contributions. Overmatch funds must be shown if expenses exceed JFNA grant funding plus the required minimum matching funds, as JFNA does not fund projects with a deficit.
8. Overhead may not exceed 10% of the total program budget (JFNA grant and required minimum matching funds). If an agency has a federal indirect cost rate (NICRA), it may use up to 33% of its NICRA rate in lieu of the 10% if the NICRA agreement is submitted with the grant application.

For example, if an agency has a NICRA rate of 40%, the agency may only use a rate of 33% overhead for this grant application. Cellular phones and computers dedicated to this program do not constitute overhead under this grant.

9. **Budget Scoring.** The budget is worth 100 points and is scored on the following:
 - a. The Budget Questionnaire responses demonstrate the applicant's ability to successfully monitor and report on grant spending. (10 points)
 - b. Expenses and income equal each other for the Master Budget. (15 points)
 - c. Expenses and income equal each other for each Project Budget (15 points)
 - d. Correct completion (lack of errors) of the entire Budget Application Workbook (20 points)
 - e. Proposed amount and individual line items for each project are reasonable and fully explained in the Budget Narrative (20 points)
 - f. Budget is detailed and reasonable to meet the goals proposed in the Work Plan (20 points)

5.4.1 BUDGET QUESTIONNAIRE

1. In the Budget Questionnaire (tab 1), read the instructions and respond to each of the questions in the cells provided. The information entered in the Budget Questionnaire (tab 1) auto populates the Master Budget (tab 2). Budget numbers must be rounded to the nearest dollar.
2. Additional Instructions
 - a. Question 1. Enter the requested information in Rows 6, 7, 11, 13, and 18. **The same amount of funding must be requested in Program Year 1 and 2** (Rows 11 and 16; Row 11 auto populates Row 16). If no overmatch is needed in Rows 13 and 18, enter zero. Overmatch funds may be different amounts in Program Years 1 and 2. No entry is needed in Rows 12, 14, 16, 17, 19 and 20 as these rows auto populate and auto calculate.
 - b. Question 2. Enter the following information:
 - i. Row 22. Write the number of projects JFNA funding will support. The number may be between one (minimum) and five (maximum); the agency is not required to have five projects.
 - ii. Rows 24-28. Write a name(s) for each project. Ensure the project names are consistent throughout all application documents.
 - iii. Note: The names entered auto populate into the corresponding Project 1-5 Budget tabs. For example, if "yoga class" is entered in Row 24, the project name auto populates in Project 1 Budget (tab 3). If "cooking class" is entered in Row 25, the project name auto populates in Project 2 Budget (tab 4).
 - c. Questions 3-5. Write detailed answers in the space provided. All questions must be answered.

5.4.2 MASTER BUDGET

1. The Master Budget (tab 2) describes the program's two-year budget summary, contributed financial and/or in-kind matching funds, and total expenses (auto populated and auto calculated from the following individual Project 1-5 Budgets (tabs 3 - 7)). JFNA funding and the required minimum matching funds must **only** be spent on the projects named in the application that subsequently have been approved by JFNA's Review Committee. Read the instructions and

enter the data needed in the space provided. Budget numbers must be rounded to the nearest dollar.

2. Additional Instructions

a. Budget Summary

- i. Rows 11 – 19 auto populate from the data entered in the Budget Questionnaire (tab 1) and/or auto calculate.
- ii. Rows 25 and 26 auto populate and/or auto calculate from the Budget Summary.

b. Matching Funds

- i. Financial. Rows 29 – 35. Enter the amount of the financial match contributions from the corresponding source(s).
- ii. In-Kind. Rows 39 – 55. Enter the amount of in-kind match contributions from the corresponding source(s). For **each** staff and non-staff person contributing to the in-kind match, list the individual's name and title, the project, percentage of FTE, and salary plus fringe. Volunteer hours are calculated at a rate of \$29.95 per hour. For in-kind contributions not listed, use the 'Other' category starting on Row 54.

1. Overmatch Funds. Rows 59 – 60. Overmatch funds are needed if JFNA funds plus the required minimum matching funds are insufficient to meet the financial expenses of your project(s). If your agency anticipates needing overmatch funds for Program Year 1 and/or Year 2, enter the lump sum amount in the required cells. If no funds are needed, enter zero. Overmatch funds may differ in Program Years 1 and 2.

c. Expenses

- i. Do not manually enter financial data for Personnel, Programming, and Overhead (Rows 67 – 69). This information auto populates and auto calculates from the individual Project 1-5 Budgets on the following tabs (tabs 3 – 7) once the data is entered.
- ii. JFNA Training Workshop. Row 70. Enter requested funds for the 2025 JFNA Training Workshop. Subgrantees are required to send at least one staff person working on this grant and may allocate up to \$5,000 for Training Workshop expenses for all attendees (e.g., registration, travel, and hotel for all attending staff members).

5.4.3 PROJECT 1-5 BUDGETS

1. In Project 1 Budget (tab 3) draft a proposed two-year budget for **only** Project 1. Budget numbers must be rounded to the nearest dollar.

- a. **Note: This information applies only to the project named in Row 4 of this form (tab 3).** Individual project budgets are required for each project requesting funding. Repeat the same instructions in the subsequent Project 2-5 Budget tabs (tabs 4 – 7). The financial data entered auto populates and auto calculates in the preceding Master Budget (tab 2) for a grand total of all expenses from all projects, and auto populates the Budget Narrative (tab 8), where a detailed justification of each expense is required.

2. Additional Instructions

a. Introduction

- i. Row 4. Name of the project auto populates from the Budget Questionnaire (tab 1).
 - ii. Row 5. Enter the project start date.
 - iii. Row 6. Enter the project end date.
 - iv. Row 7. List the Service Population(s) for this project only. Applicants may serve one or multiple populations with this project. Please specify which demographic population of older adults, if applicable.
 - v. Row 8. Indicate the total number of anticipated participants who will be served for only this project in Program Years 1 and 2. This information should match the information in the Program Questionnaire.
- b. Budget Summary
 - i. If a line item is unnecessary, enter zero in the cell.
 - ii. Personnel (Rows 18 – 27). For staff, consultant, and training positions' expenses covered by this grant, enter the individual's name and title (or future hire), percentage of FTE, and salaries plus fringe. **Each position needing funding must be a separate line item.**
 - iii. Programming (Rows 30 – 48). Enter the expenses for Project Activities, Training (not including the JFNA Training Workshop), Travel, and Outreach and Education covered by this grant. Use Other (Row 46) for project expenses not covered in the designated categories.
 - iv. Overhead (Rows 52 – 55). Overhead may be no more than 10% of the total program budget (JFNA funding and required minimum match), unless the applicant has a federal government indirect cost rate (NICRA) which may be used up to a maximum of 33%. Cellular phones and computers dedicated to this program do not constitute overhead under this grant.

5.4.4 BUDGET NARRATIVE

1. The **Budget Narrative** (tab 8) explains the rationale of an applicant's proposed budget, including sources of program revenue for matching funds and anticipated program expenses. It describes the numbers and decisions behind the proposed budget and each requested project expenditure or line item.
2. Additional Instructions
 - a. Draft a budget narrative based on the completed Master Budget (tab 2) and the individual Project 1-5 Budgets (tabs 3 – 7). Project names and expenses, and income matching funds by category auto populate the expense and income narrative charts based upon the information entered in the prior tabs.
 - b. For **each** proposed line item expense in the individual Project 1-5 Budgets (tabs 3 – 7), write a detailed explanation of the expense and why it is needed for the project in the three expense charts (Personnel, Programming, and Overhead).
 - c. For **each** proposed line item (except for JFNA funding) in the Income Section of the Master Budget (tab 2), write a detailed explanation of the matching funds income in the three income charts (Financial, In-Kind, and Overmatch).
 - d. **Failure to describe the rationale for a proposed line item may prevent funding that specific line item.**
3. Expenses Narrative Charts

- a. Personnel. The project name and its related budget from the prior Project 1-5 Budgets (tabs 3 – 7) auto populates the chart. Describe all personnel supported by the JFNA grant, including staff members, trainers, and consultants in the corresponding Explanation Section. Enter the name of the staff/non-staff person (or enter future hire), title of the staff/non-staff person, percentage of FTE, annual salary plus fringe, and total budgeted amount for the staff/non-staff person. **Each position must be a separate line item.**
 - b. Programming. The project name and its related budget from the prior Project 1-5 Budgets (tabs 3 - 7) auto populates the chart. Explain the cost for **each** item and activity necessary to implement the project(s), including the approximate number of events, people, and/or items in the corresponding Explanation Section. **Each** item means all project activities (activity, project-related technology devices, meeting/event space, activity supplies/materials, other), training (staff and volunteer PCTI training), travel (staff transportation for service delivery only, Service Populations' transportation for this project only), outreach and education (marketing for program outreach and events, website, and printing/copying/postage), and other items listed in the individual Project 1-5 Budgets (tabs 3 - 7).
 - c. Overhead. The project name and its related budget from the prior Project 1-5 Budgets (tabs 3 – 7) auto populates the chart. Explain **each** administrative expense and the cost attributed to it in the corresponding Explanation Section. In Row 24 indicate if your agency has an indirect cost agreement (NICRA) with the federal government by entering the percentage.
4. Income Narrative Charts
 - a. Financial Contributions
 - i. Row 35. The row auto populates based on the financial data entered on the Master Budget (tab 2).
 - ii. Row 36. For each financial matching fund source, describe the amount, source of funds, expected date of receipt, if the commitment is secured or anticipated, and any other relevant information.
 - b. In-Kind Contributions
 - i. Row 38. The row auto populates based on the financial data entered on the Master Budget (tab 2).
 - ii. Row 39. For each in-kind matching contribution source describe the amount, source of contribution, expected date of receipt, if the commitment is secured or anticipated, and any other relevant information.
 - c. Overmatch Contributions
 - i. Row 41. The row auto populates based on the financial data entered on the Master Budget (tab 2).
 - ii. Row 42. For each financial and/or in-kind matching fund source contributing to the overmatch, describe the amount, source of funds, expected date of receipt, if the commitment is secured or anticipated, and any other relevant information.

6. QUESTIONS FOR THE REVIEW COMMITTEE

1. The Review Committee evaluates each application independently and on its own merits; however, JFNA considers each application in the context of other applications and the available funding. The Review Committee's responses to the following questions will not receive a score but may help JFNA in its final decisions. JFNA asks the Review Committee the following questions.
 - a. Would you recommend funding this applicant for this proposal? (Yes, No, Maybe)
 - b. Briefly explain your funding recommendation. Character Limit: 1,000
 - c. What funding level would you recommend? (full, none, partial)
 - d. Due to funding limitations, an applicant may have to cut or reduce the scale of part(s) of an application to fit the available award amount. Explain 1) which projects you recommend eliminating and/or 2) which projects you recommend downsizing. Character Limit: 1,000
 - e. Whether or not you recommend funding, please provide constructive feedback for the applicant. Even strong applications can use improvement. Provide up to ten specific improvements that you would want to see.

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