

OUR CITY OF MADISON

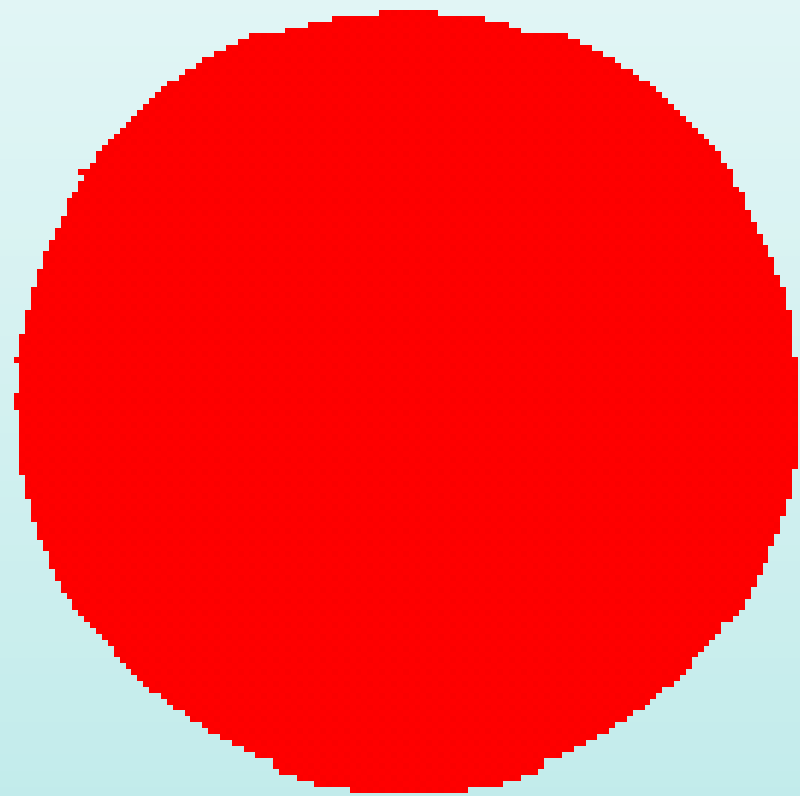


The Older Adult Services 2024 RFP Workshop will begin shortly

Department of Planning and Community &
Economic Development
Community Development Division



Begin Recording



REC

OUR CITY OF MADISON



Older Adult Services 2024 RFP Workshop

Department of Planning and Community &
Economic Development
Community Development Division





Introductions

Please write your **name**
and the **organization** you are
representing in the chat!

Feel free to share your
contact information as well



Agenda



- 1. Welcome, Intro to Application Components, and Overview of Timeline**
- 2. Older Adult Services Application Overview**
 - a. Older Adult Services Policy Paper
 - b. RFP Guidelines
 - c. Application Instructions
 - d. Part 1 - Organization Narrative
 - e. Part 2 - Program Narrative
 - f. Part 3 - Budget Workbook/Budget Narrative
- 3. Timelines and Committee Process**
- 4. Certificate of Insurance (COI) and Affirmative Action Plan Requirements**
- 5. Contracting Process**
- 6. Workshop Evaluation**
- 7. Q&A Session**



Reminder

**This funding is
available for
Older Adult
Service
Programming**



- **Not employment**
- **Not Crisis, Intervention,
and Prevention**
- **Not therapy/individualized
counseling**



[click here for future RFP schedules](#)

Timeline and committee process

letter of
intent

Proposal
Due

Request for Proposal (RFP) Activity	Date
Finance Committee	5/13/24
Common Council Approval	5/21/24
Publish RFP	5/24/2024
Older Adult Services RFP Workshop	6/5/2024
<u>Required Submission of Letter of Intent</u>	6/17/2024
<u>DEADLINE FOR SUBMISSION OF PROPOSALS</u>	<u>7/1/2024</u>
Applicant Presentations	8/28/2024
Committee on Aging Meeting – Finalize Funding Recommendations	9/25/2024
Resolution with Funding Recommendations Introduced to Common Council	10/8/2024
Finance Committee Action	10/14/2024
Common Council Action	10/29/2024
Applicants notified of Funding Allocations	10/30/2024
Anticipated contract start date	1/1/2025



On the Rise

Highest rates of social isolation

Digital Divide

Especially among low-income and marginalized groups

Growing demographic

268,516 - Madison pop.
46,653 - 17.4% 60+*

COVID

Higher infection rates, hospitalizations, and mortality compared to other age groups

Health Equity

Health disparities among older adults, particularly among marginalized and low-income pop., continue to widen

Housing Security

The lack of affordable housing options for older adults remains a critical issue, with many older adults facing housing instability and homelessness

Least amount of funding

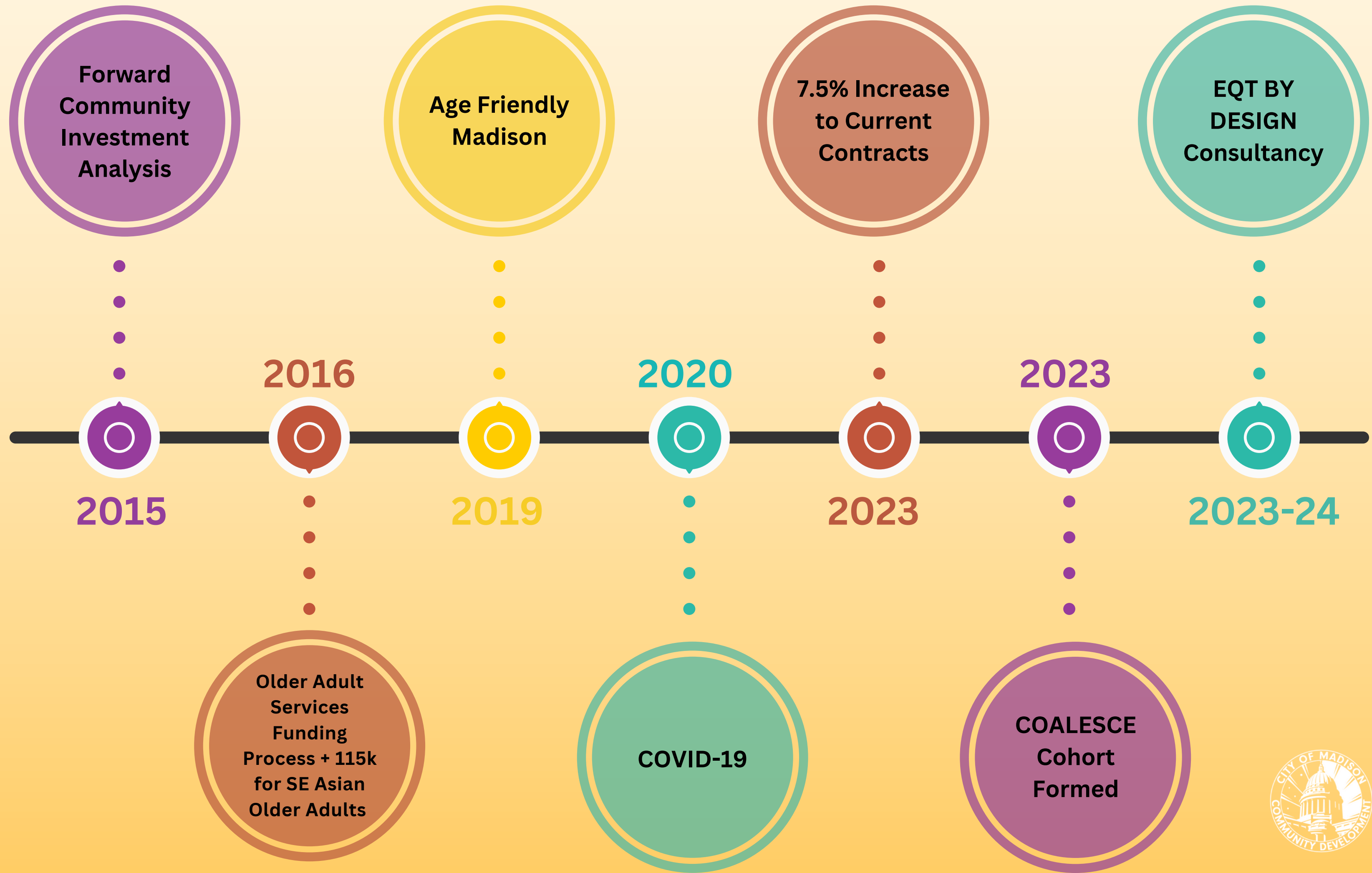
Least amount of funds available when compared to similar service areas at the City

\$838,039

On the Descent

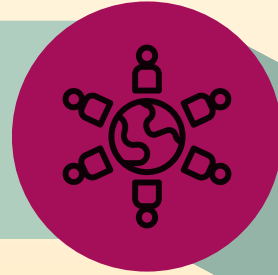


Timeline



What are Older Adults saying about services?

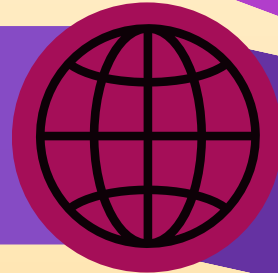
Staff Diversity



Transportation Challenges



Culturally Relevant Programming



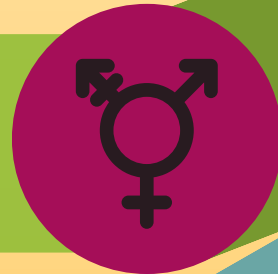
Information Distribution



Support Providers serving BIPOC/LGBTQ+



LGBTQIA+ Services



Language Access



**EQT BY DESIGN
RECOMMENDATIONS**

EQT By Design highlights areas of growth to pursue within older adult services



RFP Guidelines - Purpose

Support programs and activities that benefit low and moderate income individuals/families, those who identify as Black, Indigenous, or People of Color (BIPOC), people who identify as LGBTQIA+, and/or Limited English Proficient (LPE) individuals.

Connect vulnerable and marginalized residents with resources designed to avoid homelessness or other crisis situations, promote household stability, and maintain personal independence.

Create the necessary conditions for older adults in Madison to successfully age in place.

Provide a structure for funding allocations based on type and level of program services.

Click here for **[Application forms and Guidelines](#)**

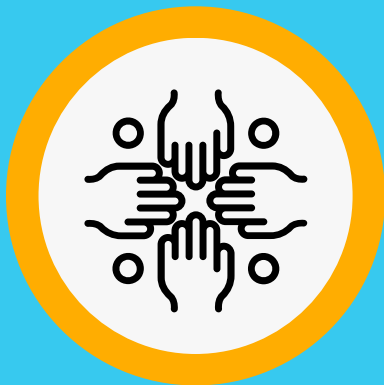
OLDER ADULT SERVICES RANGE OF PROGRAMMING



Case Management Services



Culturally Relevant Services



**Information, Outreach, and
Referral Services**



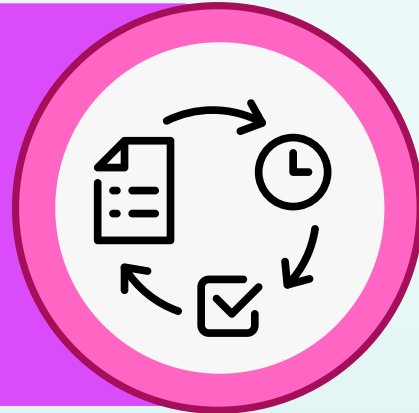
**Independent Living
Support Services**

RFP Guidelines

MEASUREMENTS OF SUCCESS



Case Management Services



- At least 75% of clients receiving case management services will access two or more of the resources identified in their Individual Service Plan (ISP).



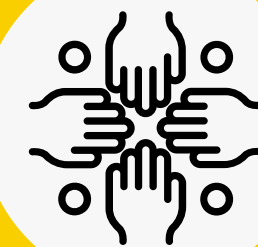
Culturally Relevant Services

- At least 75% of older adults served access Older Adult Activities programs that improve 1) their physical and mental health, 2) their ability to engage with their community, and/or 3) their ability to avoid disease and disability.

Independent Living Support Services



- At least 75% of program participants state that the Independent Living Support program enables them to stay living safely and independently in their homes.



Information, Outreach and Referral Services

- Measure the rise in the number of individuals and households accessing assistance, referrals, and navigation services

Service Area Outcome All programs

75% of clients/participants report that the services/assistance/programming they receive contribute positively to their desired quality of life

RFP Guidelines Priority Areas



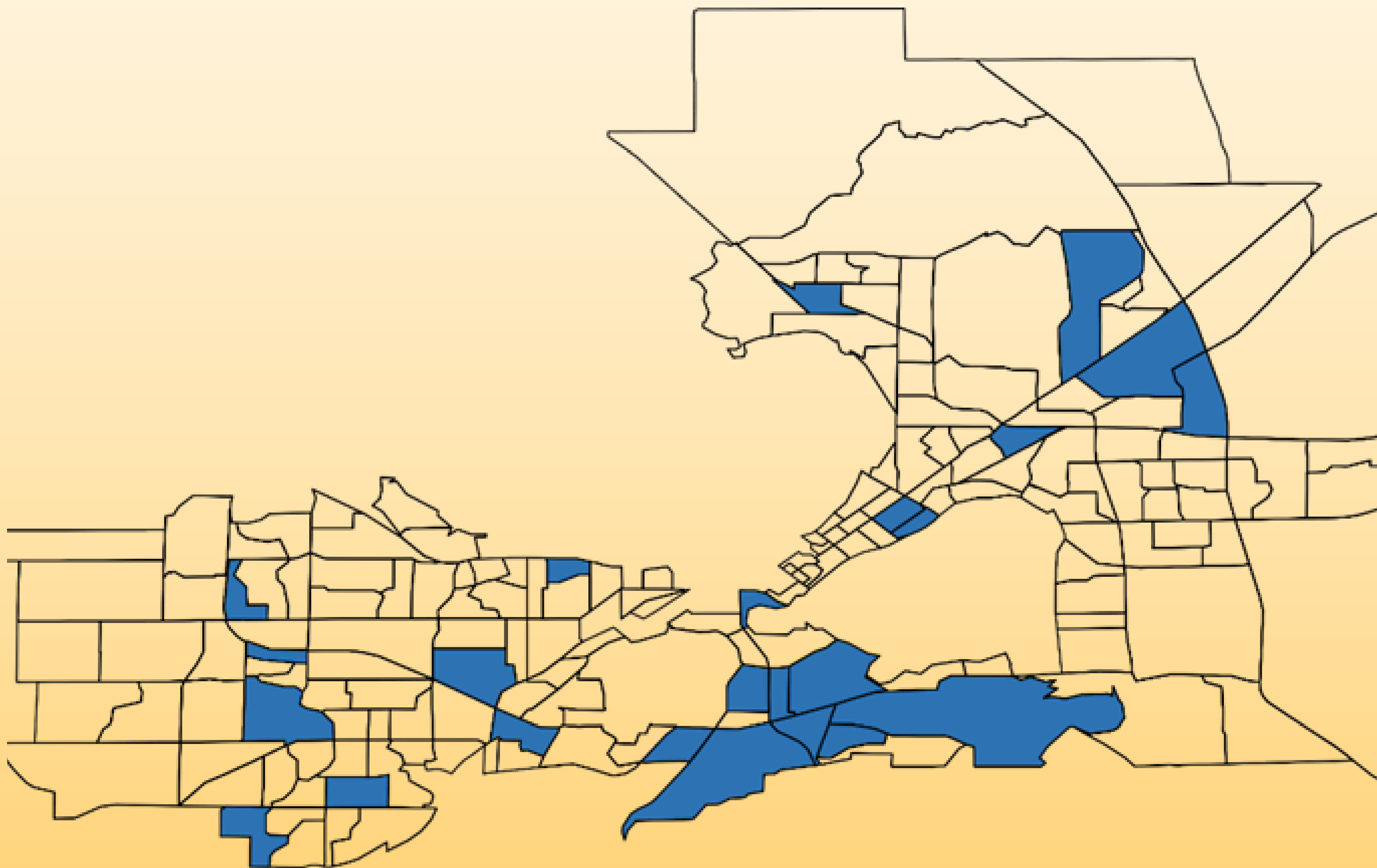
The goal of the Equity Priority map is to identify Census block groups in Madison where targeted investment, resource and inclusion strategies, and service delivery can have the greatest impact on promoting equity and addressing systemic barriers.



RFP Guidelines Priority Areas Continued



- **Incorporates race/ethnicity + Income levels + Age**
 - **Not used in isolation**
 - **Important to community members, also used elsewhere as best practice**
- **Just because an area isn't listed does NOT mean everything is perfect**
 - **Everyone deserves access to resources for a fulfilling life.**
 - **Economic status or background can create disparities in accessing these resources.**
- **This is a tool, and NOT the whole picture. Data has limitations.**



Neighborhood Level



- **Far West**
- **West**
 - Walnut Grove
 - Oakbridge Condominiums
 - Midvale Heights
- **Southwest**
 - Allied
 - NewBerry Heights
 - HighPoint Estates
 - Maple-Prairie
 - Glacier Ridge
- **Nearwest**
 - Rocky Bluff
- **South**
 - Bridge-Lakepoint
 - Brams Addition
 - Burr Oaks
 - Leopold
 - Indian Springs
 - Moorland-Rimrock
- **Downtown**
 - Capitol Neighborhoods
 - Monona Bay
 - Near Brittingham Apartments
- **Near East**
 - Sherman Terrace
 - Eken Park
 - Worthington
 - Marquette
- **North**
 - Kennedy Heights
 - Vera Court
- **Northeast**
 - Westchester Gardens
 - Norman Acres
 - Reidgewood
- **Far Northeast**
- **South East**
- **Far Southeast**



RFP Guidelines Funds available

\$838,039

On average, City funding for older adult programs accounts for 20% of total program costs.



***Prior city funding of programs should not be considered a guarantee of future funding**

RFP Guidelines Eligibility Criteria



- **Eligibility is open to non-profit organizations and agencies that have obtained tax-exempt status under 26 USC 501(c)(3)**
 - **OR groups that can secure, as fiscal agents, organizations that have obtained such status. Please see the Fiscal Agent form available on the Funding Process website for more information.**
- **Organizations that are identified to serve as Fiscal Agents on behalf of applicants will be asked to indicate their understanding of the City's expectations and agreement to act on the applicant's behalf.**

Collaborative Proposals

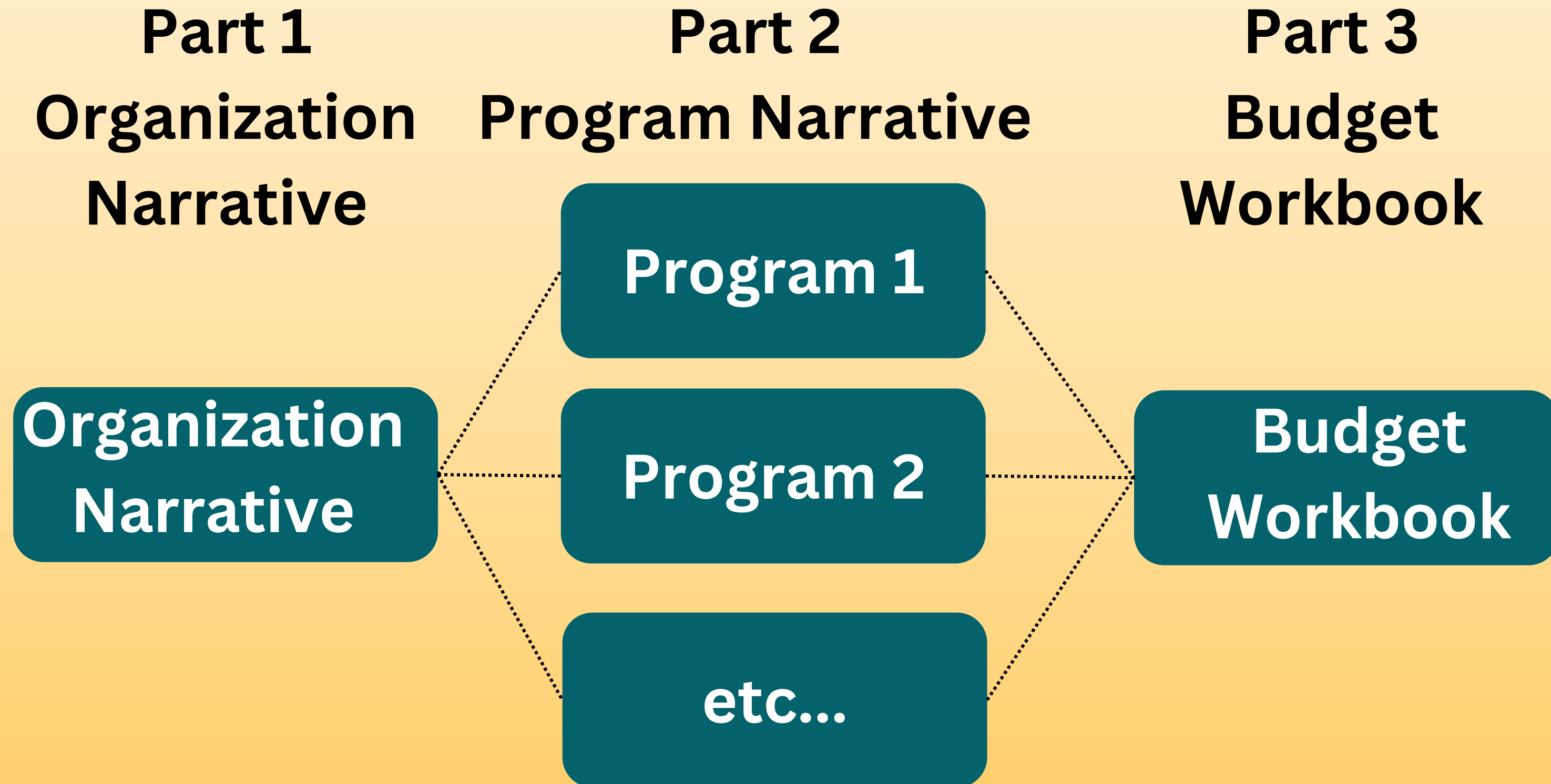


- **Joint proposals that request funding for multiple agencies participating in a collaborative effort are encouraged. Community partners named in any collaboration must provide letters of support and/or MOU/MOA detailing roles and responsibilities.**



Applicant Types

Single Applicant





Applicant Types

Joint/Multi Agency Applicants

Part 1 Organization Narrative

Part 2 Program Narrative

Part 3 Budget Workbook



The identified “Lead Agency” for a specific program will submit ALL required application materials on behalf of all partners.

Application Instructions - Required Information and Content of Proposals



2.3 Required Information and Content of Proposals

Please include only the required submittals specified below. Additional materials will not be accepted.

- Part 1 - Organization Narrative Form
- Part 2 - Program Narrative Form
- Part 3 - Budget workbook
 - Budget Narrative Form – Joint/Multi-Agency applications only
- Letters of Commitment
 - Agencies listing a primary partner/collaborator in addition to any joint/partner applicant (See Program Narrative – Question 4c) for their program should include a letter of commitment/support from the agency partner highlighting the ways in which the agency will support the program.
- Fiscal Agent Form - Complete the form (if applicable).

Submit all applications **BY PROGRAM**

-If your agency is applying for 3 programs, we will expect to see 3 separate emails including all the required information to cddapplications@cityofmadison.com



File Naming

Please follow the file naming format provided below.

[Program Name]_[Your Agency's name]_[Program Type]_[Document Type]_[Applicant Type]

**Age Out Loud _OlderAdult Agency Inc._Culturally Relevant services_Organization Narrative_
JOINT/MULTI PARTNER**

Please see [Applicant Checklist](#) for File Naming Assistance



Organization Narrative

Legal Name of Organization:	Older Adult Agency	Total Amount Requested:	\$ 400,000
All program(s) connected to your organization:	Program Name: Program 1 Applicant Type: Joint Application - LEAD Program Type: Culturally Relevant Services List Program Partner(s) (if applicable): Partner X Joint Application - PARTNER, Partner Y, Choose an item., Choose an item.	Amount Requested: \$ 150,000	
	Program Name: Program 2 Applicant Type: Single Agency Application Program Type: Case Management Services List Program Partner(s) (if applicable): Choose an item., Choose an item., Choose an item., Choose an item.	Amount Requested: \$ 150,000	
	Program Name: Program 3 Applicant Type: Joint Application - PARTNER Program Type: Independent Living Support Services List Program Partner(s) (if applicable): Agency 1 Joint Application - LEAD, Choose an item., Choose an item., Choose an item.	Amount Requested: \$ 100,000	
	Program Name: Applicant Type: Choose an item. Program Type: Choose an item. List Program Partner(s) (if applicable): Choose an item., Choose an item., Choose an item.	Amount Requested: \$	
	➤ If you are applying for more than four programs please contact Garrett Tusler gtusler@cityofmadison.com		

Total program request



Program Narrative

Program Name:	Program 1	Total Amount Requested for this Program:	\$ 150000		
Legal Name of Organization:	Older Adult Agency	Total amount Requested for Lead/Single Applicant	\$ 75000		
Legal Name of Partner(s) (Joint/Multi-Agency Applicants only):	Partner X	Total Amount Requested for Partner 1:	\$ 50000		
	Partner Y	Total Amount Requested for Partner 2:	\$ 25000		
		Total Amount Requested for Partner 3*:	\$		
Program Contact:	Garrett Tusler	Email:	gtusler@cityofmadison.com	Phone:	

Program Type: Select ONE Program Type for this form.

- ☐ Case Management Services
- ☒ Culturally Relevant Services
- ☐ Independent Living Support Services
- ☐ Outreach, Information, and Referral Services

PLEASE NOTE: Separate applications are required for each distinct/stand-alone program. Programs are considered distinct/stand-alone if the participants, staff and program schedule are separate from other programs, rather than an activity or pull-out group.

*Click or tap here to enter text.



Budget Workbook

AutoSave Budget Workbook_2024 Older Adult Services RFP.xlsx - ...

FileHomeInsertPage LayoutFormulasDataReviewViewAutomateDeveloperHelpDYMOLabelAcrobat

Paste

Clipboard

Arial8

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Alignment

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Conditional Formatting

Format as Table

Cell Styles

Styles

Insert

Delete

Format

Cells

Editing

Sensitivity

Add-ins

Create PDF and Share link

Create PDF and Share via Outlook

Adobe Acrobat

C7

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	APPLICATION FOR 2024 OLDER ADULT SERVICES PROGRAMS						3. SIGNATURE PAGE						
2													
3	1. ORGANIZATION CONTACT INFORMATION						AFFIRMATIVE ACTION						
4	Legal Name of Organization						If funded, applicant hereby agrees to comply with City of Madison Ordinance 39.02 and file either						
5	Mailing Address						an exemption or an affirmative action plan with the Department of Civil Rights. A Model						
6	Telephone						Affirmative Action Plan and instructions are available at cityofmadison.com/civil-rights/contract-compliance.						
7	FAX												
8	Director						CITY OF MADISON CONTRACTS						
9	Email Address						If funded, applicant agrees to comply with all applicable local, State and Federal provisions. A sample contract						
10	Additional Contact						includes standard provisions may be obtained by contacting the Community Development Division at 266-652						
11	Email Address						If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected agen						
12	Legal Status		Private: Non-Profit										
13	Federal EIN: f						INSURANCE						
14							If funded, applicant agrees to secure insurance coverage in the following areas to the extent required by the Ci						
15							of Risk Management: Commercial General Liability, Automobile Liability, Worker's Compensation, and Profes						
16	2. PROPOSED PROGRAMS		2025		If currently City funded		The cost of this coverage can be considered in the request for funding.						
17	Program Name:		Letter	Amount Requested	2024 Allocation	Joint/Multi Application - SELECT Y/N							
18			A				4. SIGNATURE						
19	Contact:												
20			B				Enter name:						
21	Contact:												
22			C				By entering your initials in the box you are electronically signing your name and agreeing to the terms listed ab						
23	Contact:												
24			D				DATE		INITIALS:				
25	Contact:												
26			E										
27	Contact:												
28	TOTAL REQUEST		\$0										
29													
30	DEFINITION OF ACCOUNT CATEGORIES:												
31	Personnel: Amount reported should include salary, taxes and benefits. Salary includes all permanent, hourly and seasonal staff costs.												

CoverPage

Board & Staff Demographics

App. I-Revenue

App. II-Expenses

App. III- ...

Budget Workbook

Ex. Older Adult Agency Inc. would submit information in the Budget Workbook for Program 1 (Lead) and Program 2 (Single Applicant)



Budget Narrative

Program Expenses	2025 Partner Request
PERSONNEL	
OTHER OPERATING	
SPACE	
SPECIAL COSTS	
TOTAL*	

*This number should equal the Total Amount Requested for your Agency on Page 2

Please answer the following questions as it pertains to the amount requested for your agency. If you do not plan to use funds for a certain category, simply state “N/A”.

- Personnel:
- a. How many permanent staff members are involved in the program/project, and what are their respective roles?
- b. What is the total annual salary budget for permanent staff, including salary, taxes, and benefits?

Budget Narrative - Joint/Multi Agency Applicants - **Partner Agencies Only**

Ex. Older Adult Agency Inc. would complete Budget Narrative for Program 3 (Partner) to be submitted by “AGENCY 1 Inc.” (Lead)

Rubric - Organization Narrative



PLEASE NOTE: Funding recommendations will be based on both the quality of proposals and distribution of programs across the desired service continuum, demographic groups and geographically across the city (see factors above)		Relevant Question/ Document	Point Value
Proposal Quality Review Item		Part <u>1</u> <u>Organizational</u> Narrative	
Organization History		1	10
Organization Experience with Type of Program		2	
Significant Changes in Organization		3	
Staff Experience, Education, Training and Support for Professional Development		4	15
Board and Staff Demographics		Budget	
JOINT/MULTI AGENCY APPLICATIONS ONLY			
Partnership History		5	5
Rationale for partnership		6	5
Division of labor		7	5
Anticipated Challenges		8	5
Experience with partnerships		9	5

Found in **RFP**
Guidelines

Rubric - Program Narrative



Proposal Quality Review Item	Part 2 Program Narrative(s)	Point Value
Need for Program	1A	5
Program Goal Statement	1B	
Program Summary	1C	
Proposed Participant Population	2A	10
2022 Participant Demographics	2B	
Language Access and Cultural Relevance	2C	
Recruitment, Engagement, Intake and Assessment	2D	
Activities	3A	15
Program Schedule	3B	
Anticipated Frequency, Duration and Attendance	3C	
Family Engagement	4A	10
Neighborhood/Community Engagement	4B	
Collaboration and Coordination	4C	10
Resource Linkage	4D	
Outputs – unduplicated participants and program hours	5A	10
Program Outcomes	5B	
Data Tracking	5C	
Program Location	6A	15
Equity Priority Area Alignment	6B	
Program Staffing	7	15
Budget – Excel Workbook	Budget	

Found in **RFP**
Guidelines

RFP Guidelines - Allocation Recommendations



[Appendix A - Scoring Rubric](#)

- There exists no “one-size-fits-all” formula or equation when developing funding recommendations.
- Community Based Organizations (CBO) do not work in isolation, but in concert with other CBOs and within larger systems.
- No single or collection of variables listed are inherently more important than others.

Process Overview



Certificate of Insurance & Affirmative Action Plan



If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected organization. City purchases of service contracts include requirements regarding nondiscrimination, consideration of vulnerable populations, Affirmative Action, and mandatory insurance coverage.



Contracting Process

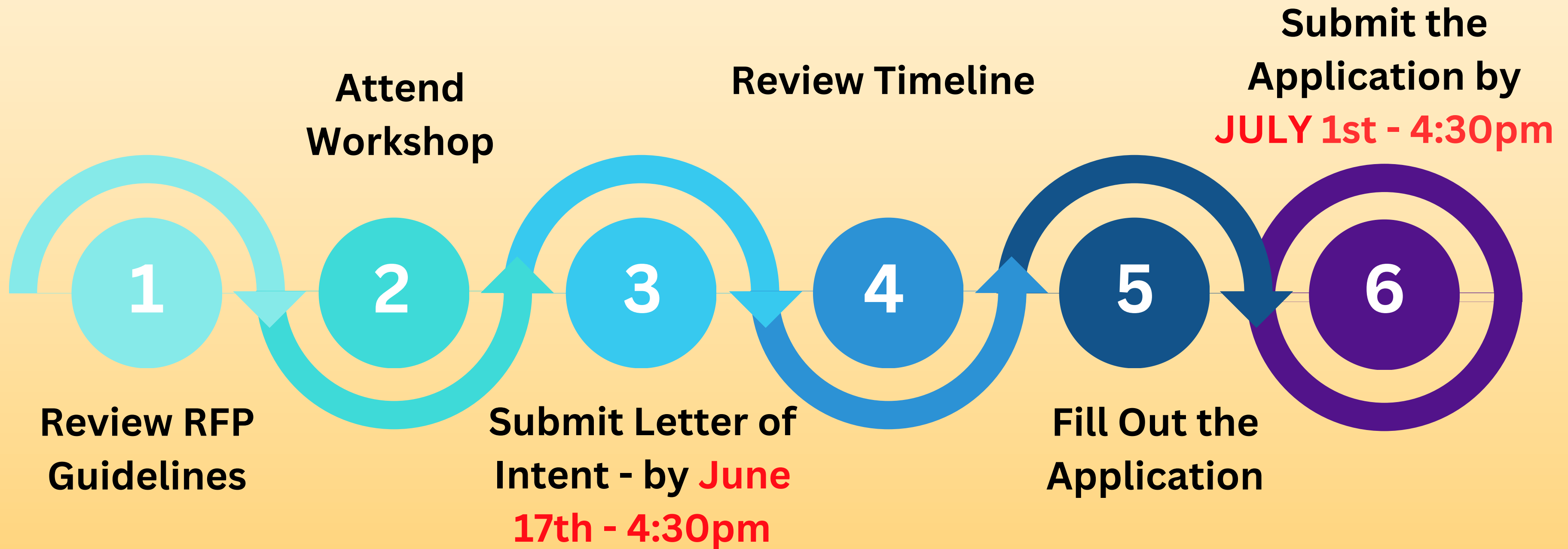


All allocated funds will be administered through the City of Madison, Community Development Division. Funded agencies will be required to submit program and expense reports.



Note: If allocation amount differs from original proposal, Contract Manager and agency will negotiate final contract requirements.

Overview



[Click Here to see timeline on our website](#)

Questions?



Yolanda Shelton-Morris, Community Resources Manager

Email: yshelton-morris@cityofmadison.com

Garrett Tusler, Community Development Specialist

Email: gtusler@cityofmadison.com

FAQ will be posted on our website

Workshop Evaluation



Scan me to take the feedback survey!



[Or click here](#)

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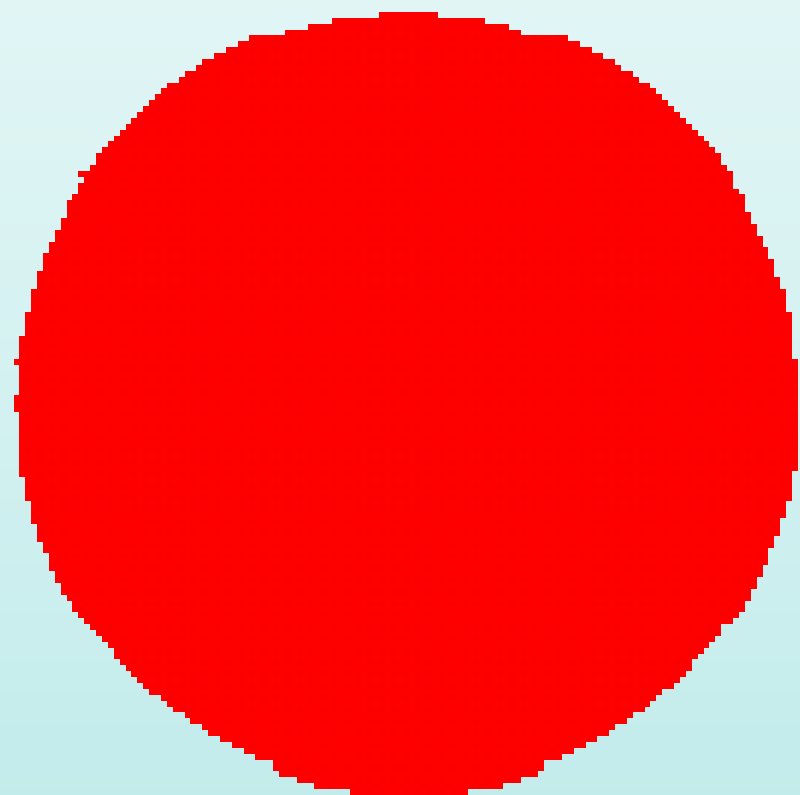


THANK YOU!

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Q+A Session
-FAQ will be posted on our
Website