

Request for Proposals and Program Guidelines

*Collaborative Approaches to Providing Expanded Critical Supports for
Holocaust Survivors, Older Adults with a History of Trauma, and Their Family Caregivers*

Expanded Critical Supports Program

Issued

September 29, 2022

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Grant Overview

1. Background

- a. 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/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. The grant mission is to expand the nation's capacity to provide Person-Centered, Trauma-Informed (PCTI) services and supports for Holocaust survivors, older adults with a history of trauma, and family caregivers (service populations). The ACL grant goals are to fund and support subgrants to develop PCTI programs for the service populations and increase the knowledge and skills of aging service providers to implement PCTI care for the service populations. Thus, the project is rooted in Holocaust survivor care, but serves diverse older populations in addition to Holocaust survivors.
- a. The JFNA Center on Holocaust Survivor Care and Institute on Aging and Trauma ("the Center") uses grant and philanthropic funds to award subgrants through various programs to expand the national capacity to provide PCTI care to Holocaust survivors, older adults with a history of trauma, and their family caregivers.

2. Request for Proposals

- a. The Center seeks proposals from select Jewish Federations for the Expanded Critical Supports Program. The Expanded Critical Supports program funds the creation and implementation of Leadership Councils and the provision of direct services to Holocaust survivors, older adults with a history of trauma, and their family caregivers ("**service populations**") to prevent crises and prevent institutionalization.
- b. As trusted community conveners, Jewish Federations are ideally suited to create and facilitate Leadership Councils that develop crisis prevention and response strategies for Holocaust survivors, older adults with a history of trauma, and their family caregivers. Jewish Federations identify agencies serving these populations and invite them to join the Leadership Councils. Leadership Councils include agencies that add an invaluable voice to the discussion and program development, such as local governmental agencies, hospitals, universities, mental health, and other aging service providers that work with Holocaust survivors, other older adults with a history of trauma, and their family caregivers.
- c. Jewish Federations train their Leadership Councils how to provide PCTI care; conduct needs assessments; and allocate funds for critical support services to prevent or respond to emergencies in the service populations.

- d. Jewish Federations become subgrantees of JFNA and the organizations that receive allocations from the Leadership Councils become sub-subgrantees of JFNA.
- e. All services funded by Leadership Councils must employ the PCTI approach.
- f. In the past, Federations' Leadership Councils have funded PCTI programs that serve Holocaust survivors, diverse populations of older adults, and family caregivers. The older adults with a history of trauma have included LGBTQ+ older adults, immigrants and refugees, crime survivors, and veterans.
- g. Jewish Federations and the Leadership Councils have flexibility in determining which service populations they will serve under this grant and what topics they will address.
- h. JFNA encourages Leadership Councils to continue this flexible approach and consider three additional areas of focus as described below. JFNA and ACL are interested in how Leadership Councils engage in these focus areas. JFNA encourages Federations to make these focus areas agenda items at Leadership Councils. JFNA does not require subgrantees to engage in all of the focus areas. However, JFNA will ask for best practices on the following focus areas:
 - i. **Expand PCTI care to more foreign-born older adults. Subgrantees serving foreign-born older adults will receive \$25,000 in additional funds, due to a supplement JFNA received from ACL.** In order to receive additional funds, subgrantees must serve more foreign-born older adults. Expansion could include expanding the number of foreign-born older adults the Federation is currently serving in a specific population and/or reaching out to new populations. Federations may choose either approach or both of them. Federations will be asked to describe those being served.
 - ii. **Explore PCTI approaches to returning to in-person programs after COVID-19 restrictions.** The ECS program is well positioned to advance innovations that promote the safe and welcoming re-integration of the service populations into in-person programs as COVID-19 becomes less of a risk factor. Leadership Councils can assess client needs and concerns caused by the pandemic and share strategies for bringing these populations back to in-person services and supports. Leadership Councils are also an excellent space for social service providers to support each other through the difficult times the post-pandemic world will bring. The lessons Federations and Leadership Councils can document from these collaborative approaches will provide a valuable roadmap to help agencies respond to, and recover from, future crises.
 - iii. **Explore programs with a focus on resilience of the eligible service populations.** The Leadership Councils will help raise awareness about resilience as a preventive, health promoting characteristic, assess and share resiliency-building strategies for the service populations, and fund programs that include a resiliency-building component. Lessons learned from these programs will be shared with JFNA subgrantees and the Aging

Network to develop promising practices in PCTI-based resilience-building programs for the service populations.

- i. This invitation-only program offers Federations the following opportunities:
 - i. Serve more Holocaust survivors, older adults with a history of trauma, and family caregivers using the PCTI approach;
 - ii. Develop partnerships with agencies working with older populations with a history of trauma and their family caregivers;
 - iii. Share promising practices in community-building and PCTI care on a national level; and
 - iv. Earn recognition as leaders in aging services and trauma-informed care.
3. Definitions of Eligible Populations
- a. The following definitions can be considered for the purposes of this grant.
 - i. **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 definition 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 as well. 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.
 - ii. **Older adult.** Older adult is a person who is age 60 or over, in accordance with the Older Americans Act (OAA).
 - iii. **Older adult with a history of trauma.** 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." A second generation (2G) Holocaust survivor who is age 60 or over would fall into this category.
 - iv. **Foreign-born older adult.** A foreign-born older adult is an individual who is 60 or older, who was not a US citizen at birth. This includes US citizens through the naturalization process, lawful permanent residents (immigrants), temporary migrants (such as students), humanitarian migrants (such as refugees and asylees), and unauthorized migrants. ([Click here to see the United State Census Bureau website](#))
 - v. **Family caregiver.** 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.

4. Programmatic Responsibilities

a. Expanded Critical Supports Federations are expected to perform two basic functions:

i. Creation and Convening of Leadership Councils: Federations will convene Leadership Councils that shall develop strategies for service delivery focused on crisis prevention and resolution to help Holocaust survivors, older adults with a history of trauma and their family caregivers. This entails:

1. Convening non-profit, private and public sector service providers that work with the service populations (ex. local area agencies on aging, senior centers, rehabilitation centers, independent and assisted living facilities, medical and mental health professionals, etc.), as well as other potential partners and stakeholders in community-wide Leadership Councils;
2. Developing strategies to identify service populations most at risk for premature institutionalization and their underlying risk factors, such as social isolation, food insecurity, unsafe housing, declining health of family caregivers, etc.;
3. Developing partnership-based strategies to serve the identified populations to reduce their risk for premature institutionalization before and after a crisis occurs, including ways to support their family caregivers;
 - a. Integrating PCTI principles into all Leadership Council processes and ensure that all direct services employ the PCTI approach; and
 - b. Sustaining the Leadership Councils beyond the end of the grant period.
4. Direct Services: Federations will distribute funds to service providers following the strategies that the Leadership Councils develop. Federations should make subgrants providing both crisis prevention and resolution services. Direct services providers may provide reimbursement to vendors, vouchers or gift cards to clients. Services under this grant can only be provided if those services are not covered by other sources.

a. **Services to prevent crises include, but are not limited to:**

- i. Dental work
- ii. Hearing aids
- iii. Financial/benefits counseling
- iv. Food programs
- v. Home repairs and safety modifications
- vi. Fall prevention programs

- vii. Transportation
- viii. Chronic disease self-management programs
- ix. Medication management assistance
- x. Wellness programs
- xi. Caregiver support
- xii. Homecare

b. **Services to resolve crises include, but are not limited to:**

- i. One-time payments for rent to avoid eviction
 - ii. One-time payments to keep utilities (heat and/or air conditioning) functioning or for necessities, such as food, clothing, etc.
 - iii. One-time payments for medications or non-Medicare eligible services and equipment, including payments for emergency dental care
 - iv. Vouchers or payments for transportation
 - v. Other one-time services necessary to enable Holocaust survivors to remain safely at home for as long as possible
- ii. Federations are responsible for collecting and reporting program, evaluation, and financial information and data about grant activities from sub-subgrantees.

5. PCTI Requirements and Resources

a. PCTI Requirements

- i. Programming supported by this grant must include methods of delivering PCTI care to Holocaust survivors, older adults with a history of trauma, and their family caregivers.
- ii. Programs proposed must be able to operate safely in a COVID-19 environment and proposals blatantly disregarding Centers for Disease Control (CDC) guidelines will not be funded.
- iii. While expanding PCTI services, organizations are encouraged to incorporate 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, encourages a PCTI workplace and program culture, and promotes organizational support for the PCTI framework.

b. PCTI Resources

- i. Resources, webinars, and other publications can be found under the [Resource Hub on our website](#) and in the [Aging and Trauma Resource Bibliography](#).
- ii. [Substance Abuse and Mental Health Services Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach](#).

- iii. [The Administration for Children & Families' Resource Guide to Trauma-Informed Services.](#)

Eligibility, Funding, Funding Limitations, and Match Requirements

1. Eligibility

- a. The Expanded Critical Supports program is an invitation-only program. Federations invited to apply have been hand-selected based on the number of Holocaust survivors in the community and the ability to convene and sustain robust organizational partnerships.
 - i. Sub-subgrantee partnership parameters:
 - 1. For the purposes of this grant, JFNA is the grantee of the federal government. Organizations receiving grants from JFNA are *subgrantees*. Organizations receiving funding through JFNA subgrantees to carry out grant activities are *sub-subgrantees*.
 - 2. Subgrantees and sub-subgrantees have the same requirements and accountability for use of federal funds.
 - 3. 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.

2. Funding

- a. Subgrantees shall receive funds, per year, as follows:
 - i. \$25,000 for the implementation of the Leadership Councils
 - ii. \$150,000 for direct services
 - iii. \$25,000 additional if the direct services include expanding support for foreign-born older adults
- b. JFNA will only commit to fund subgrantees in Program Year 1 (January 1, 2023 – December 31, 2023). If federal funding is available, JFNA intends to fund the subgrantees for Program Year 2 (January 1, 2024 – December 31, 2024) at the same funding level as in Year 1, dependent upon subgrantee compliance with all program requirements and the success of the subgrantee's program. JFNA requests applicants to propose a two-year budget.

3. Funding Limitations

- a. **Funding may NOT be used for:**
 - i. The development of PCTI training materials without a direct service component to the project.
 - ii. Funds from the Expanded Critical Supports Program and funds from other JFNA programs cannot cover the exact same costs for the exact same staff, consultants, event space, and/or programming (e.g., no "double dipping.")

- iii. Services to treat secondary trauma in clients who are not older adults, unless the client is currently a family or informal caregiver to a Holocaust survivor or 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 only consisting 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. Emergency Financial Assistance is allowable and is not considered a grant.
- x. The production of materials or tools to be licensed or sold. Additionally, JFNA and all subgrantees have agreed to grant each other rights to publish and use all materials developed in connection with the grant.
- xi. Religious instruction. [Limitations on religious activities can be found here.](#)
- xii. [Limitations related to the use of grant funds for meals can be found here.](#)
- 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.
- xviii. Any and all insurance, including but not limited to general and liability insurance, auto and bus insurance.
- xix. Transportation costs that are unrelated to the funded program, and repairs for automobiles, buses, etc. owned by the service populations, staff, and the organization.

4. Match Requirements:

- a. Subgrantees are required to contribute **a minimum match equal to 50% of the funds received from JFNA. The match may be comprised of financial (cash donations or grants), in-kind contributions (goods, services, or time), or both.**
- b. Subgrantees are responsible for raising minimum matches in both Year 1 and Year 2, if Year 2 funding is available.

- i. **By June 30, 2023, and by June 30, 2024**, 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.
 - ii. If subgrantees cannot demonstrate the required minimum match by **June 30, 2023**, funding for program Year 2 may not be issued.
- c. Funds awarded by JFNA are comprised of federal government funds. Matching funds for this grant are subject to the same requirements as government funds.
- d. Funds can only be included as match if the following conditions are met:
 - i. The match funding must be applied to the same population as served by the JFNA funded program;
 - ii. The match funding must be used for the same purpose as the JFNA funded program; and the match funding may not be used for other subgrantee programs.
- e. 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. Financial contributions, including support from state or local government, foundations, individual donors, Federations, the Claims Conference, and KAVOD SHEF.
 - ii. In-kind contributions, including staff and volunteer time, donated goods, and office space.
- f. The following sources **cannot** be used toward the JFNA match:
 - i. Federal funds.
 - ii. Funds used to match other grants.
 - iii. Funds received from JFNA, such as the Center’s Innovations Program or JFNA’s contributions to KAVOD SHEF grants (e.g., the KAVOD SHEF outreach grants or the match contribution).
- g. Overmatch
 - i. Overmatch is defined as funds raised beyond the minimum match requirement.
 - ii. Overmatch funds may be used for additional programming or overhead expenses related to this program. They can also be used for expenses beyond what is allowable by the grant (such as insurance).
 - iii. Overmatch funds should be explained in the Budget Questionnaire, the Budget Narrative and included in the Budget Template.

Expectations and Compliance

1. Expectations

- a. Subgrantees are expected to begin implementation of the proposed program by **January 2, 2023**. Implementation is defined as initiating program launch, but not necessarily service delivery.

- b. Subgrantees shall join a community of practice and are required to participate in the technical support activities associated with the Center including but not limited to:
 - i. Mandatory participation in quarterly virtual “check-in” meetings. The Center offers coaching on evaluation strategies, program development, and on how to implement PCTI strategies throughout an organization.
 - ii. Mandatory evaluation of JFNA-funded PCTI programs in consultation with Center staff, and reporting on evaluation progress and findings to the Center.
 - iii. Mandatory participation in webinars on topics related to the service populations; the program, financial, and evaluation components of the grant; and the PCTI approach.
 - iv. Mandatory participation in the JFNA Training Workshop.
 - v. Mandatory participation in a site visit if convened by Center staff.
 - vi. Serving as a peer mentor and a thought leader in the field of PCTI care.
 - c. Subgrantees are required to provide programmatic and financial oversight of sub-subgrantees including monitoring and reporting of quarterly income, expenses, and matching funds and completion of relevant financial forms and trainings, as well as program progress, challenges, and lessons learned.
 - d. Subgrantees are required to collect program, evaluation, and financial data from sub-subgrantees about the services provided to the service population, including but not limited to the number of clients served in each program funded by the grant; program progress, challenges, and lessons learned; and quarterly income, expenses, and matching funds raised.
 - e. Subgrantees are required to raise the required minimum matching funds;
 - f. Subgrantees are encouraged to sustain their programs beyond the grant period. A key to sustainability includes sharing the knowledge gained through participation in this grant program with other organizations, so that PCTI care becomes the accepted strategy for serving older adults. Part of sustainability is dissemination of program materials and innovations through national conferences, online resources, publications, and other venues.
 - g. Subgrantees must sign the Cooperative Agreement with JFNA.
2. Reporting Requirements
- a. All subgrantees are required to submit the following reports:
 - i. Quarterly JFNA Financial Workbook which includes the Financial Reporting Form, Evidence of Match Form, Budget Modification Form (as needed), and the Carryover Form (as needed).
 - ii. Quarterly Program Participant Report
 - iii. Semiannual Programmatic Report
 - iv. Annual Work Plan
 - v. Annual Program Evaluation Update
 - vi. Annual Evaluation Report
 - vii. Annual Technical Support Survey

- viii. End of Program Summary Report
 - ix. Programmatic and Budget Modification Request, as needed
 - x. Updated Financial Documentation, as needed
 - 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 awarded in response to this RFP will include federal funds. The recipients of awarded funds 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 are subject to the general provisions of 45 CFR Part 75, specifically 45 CFR §75.351 and §75.352, [found here](#).
4. SAM Registration and Unique Entity ID (UEI)
- a. The Federation must register in SAM and have a Unique Entity ID (UEI) number by the time funding is disbursed. For more information, see below.
 - b. Federal System for Award Management (SAM) registration: The applicant organization 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. Applicants 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 Sub-grantee 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](#).

Application and Review Process

1. **Application Overview:**
 - a. **Informational Call:** We encourage applicants to participate in the optional informational conference call, which includes a review of the RFP and Program Guidelines and a question and answer period. The call will be recorded and posted on the Center’s website. The call will be held Friday, October 7, 2022.
 - b. **Stage 1:** The Center will review applications.
 - c. **Stage 2:** The Center offers guidance to help applicants modify their proposals in order to fit within the guidelines of the grant, if applicable.
 - d. **Award Letter:** The Center sends an award letter and Cooperative Agreement to successful applicants.
2. **Application Timeline:**
 - a. Wednesday, November 2, 2022 at 5:00pm ET: Stage 1 Applications due
 - b. Friday, December 2, 2022 at 5:00pm ET: Stage 2 Applications due
 - c. Friday, December 16, 2022: Anticipated date for award announcements
 - d. Monday, January 2, 2023: Grant program implementation begins
3. **Application Sections**
 - a. The following templates must be completed and submitted via JotForm. See pages 14-22 for details about the contents of each of the application components.
 - i. Program Questionnaire
 - ii. Budget Application Workbook (complete Excel and do not PDF this document), including:
 1. Budget Questionnaire
 2. Budget Template
 3. Budget Narrative
 - iii. Work Plan
 - iv. Financial Documentation
 1. Entire organization budget for current fiscal year
 2. Entire organization budget for most recent completed fiscal year
 3. Independent Management Letter
 4. FY2021 Organization Audit
 5. FY2021 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. SAM registration confirmation or verification registration is in progress, and UEI number
 8. Copy of the organization’s indirect cost agreement with the government, if applicable

- b. All application materials, including templates, can be found in the [Expanded Critical Supports Library of Forms here](#).
 - c. Ensure all acronyms are written out the first time they are used.
 - d. [Applications should be submitted through JotForm through this link](#).
 - e. **Please submit your application at least one business day prior to the deadline to give time to address any technical questions.**
4. Review Process
- a. The review process consists of two stages:
 - i. In Stage 1, Center staff reviews all proposals and offers applicants guidance to modify proposals, as needed. Applications will be evaluated on whether the cumulative proposed application is complete, clear, cohesive, and realistic.
 - ii. In Stage 2, the applicants re-submit materials, as needed. Upon request applicants may be required to revise their proposal and resubmit the following documents via JotForm pursuant to JFNA’s guidance:
 - 1. Explanation of Program and Budget Revisions
 - a. If asked, please re-submit a revised Budget Workbook, which can include a revised Budget, Budget Narrative or Budget Questionnaire.
 - b. If asked, re-submit a revised Work Plan.
 - c. If asked to update your questionnaire, please submit a word document with corresponding questions, numbers, and updated responses. This will be considered an addendum to your original application questionnaire.

Completing Application Templates

- 1. Below are the questions from the JotForm application, including the maximum word counts. For your convenience, [here is the link to the application](#).
 - a. Program Questionnaire
 - i. **Community Demographics and Need**
 - 1. Provide a brief description of the Holocaust survivor population in the community, including estimates of the total number of Holocaust survivors, number currently served, and unmet needs that could result in a crisis or premature institutionalization. (200 words max.)
 - 2. Provide a brief description of the older adult population with a history of trauma in the community that you plan to serve through this grant and type of unmet needs that could result in a crisis or premature institutionalization. Please be specific in describing the demographic and why they have been selected. If you are planning to serve more foreign-born older adults, please

describe if you have served this population, if you plan to continue serving this population or diversify, how you will outreach and engage this population. If you do not plan to serve older adults with a history of trauma, please write not applicable. (500 words max)

3. Would you like to be considered for additional funds to expand services to foreign-born older adults? If yes, please indicate amount of additional funds up to a cap of \$25,000. (Note: this question will be repeated in the Budget Application Workbook and the Program Questionnaire.)
 4. Provide a brief description of the needs of family caregivers who are caring for Holocaust survivors and/or older adults with a history of trauma in the community that you plan to serve through this grant. If you do not plan to serve family caregivers, please write “not applicable” (200 words max.)
- ii. **Leadership Council Strategy and Planning Process**
5. How will you convene community partners (e.g., local agencies, hospitals, universities, etc.) to develop strategies for providing critical supports to the service populations? (500 words max.)
 6. Specify which agencies and individuals you plan to invite to join your Leadership Council planning process. Explain why you chose these agencies and what expertise do you expect they will bring to the Leadership Council. Describe your outreach strategies and timelines to engage those agencies and individuals. (500 words max.)
 7. How will you involve Holocaust survivors or if necessary, a descendent of a Holocaust survivor, in the Leadership Council planning process? (200 words max.)
 8. How will you involve older adults with a history of trauma in the Leadership Council planning process? (200 words max.)
 9. How will you involve family caregivers of older adults with a history of trauma in the Leadership Council planning process? (200 words max.)
 10. How will you engage the Leadership Council to determine the critical needs of Holocaust survivors that could lead to crisis or premature institutionalization if not met? (200 words max.)
 11. How will you engage the Leadership Council to determine the critical needs of older adults with a history of trauma that could lead to crisis or premature institutionalization if not met? If you plan to serve more foreign-born older adults, please describe how the Leadership Council will determine the needs of that population/s. (500 words max.)

12. How will you engage the Leadership Council to determine the needs of family caregivers of Holocaust survivors and/or older adults with a history of trauma? (200 words max.)
13. How will you engage the Leadership Council to ensure implementation of PCTI care while returning to in-person programs post-COVID? (200 words max.)
14. How will you engage the Leadership Council to promote resilience in Holocaust survivors, older adults with a history of trauma, and family caregivers? (200 words max.)
15. Describe the decision-making processes that you anticipate the Leadership Council will use to determine strategies for funding priorities. (500 words max.)
16. How will you incorporate PCTI approaches into all aspects of the Leadership Council, including training partner agencies in trauma and PCTI care? (500 words max.)

iii. **Direct Services**

17. Describe the logistical process for allocating grant funds to sub-grantees (e.g., create RFP process, lay leader involvement, Leadership Council review) (200 words max.)
18. How will you track and monitor grant funds from JFNA to sub-grantees to ensure compliance with all JFNA and federal grant requirements? (200 words max.)
19. How will you encourage your sub-subgrantees to adapt their programming to ensure the safety of program participants as the COVID-19 pandemic evolves? (200 words max.)
20. What percent breakdown do you anticipate serving among Holocaust survivors, older adults with a history of trauma, and their family caregivers through direct service? If you expect that multiple populations of older adults with a history of trauma will be served, please estimate the percentage breakdown of each population to be served.

iv. **Evaluation**

21. What outcomes would you like your project to achieve? (500 words max.)
 - a. **Outcomes:** Outcomes are the results or goals of the program on participants. For example, an outcome or result of a Café Europa project could be an improvement in a participant's degree of social connection. In another example, an outcome for a counseling project could be an improvement in a participant's mental health.
22. What are indicators by which you will measure the outcomes of your Leadership Council (e.g., new relationships created, new collaborative projects created, etc.)(500 words max.)

- a. **Indicators:** Indicators are measures of your program's outcomes. Indicators assist in measuring progress in implementing the program intervention and achieving program results. Indicators must be SMART, or specific, measurable, achievable, relevant, and time-bound. For example, an indicator of a Café Europa participant outcomes could be the number of participants self-reporting improved connection to their community after participating in at least one Café Europa event during the grant year. In another example, an indicator of a counseling project could be the number of participants reporting during weekly case management calls that they use the stress management skills learned through the counseling project.
23. What data collection tools will you use to measure the outcomes of your Leadership Council (e.g., interviews with your partners, surveys)? (500 words max.)
 24. Please describe your organizational capacity to measure the outcomes of your Leadership Council. This may include a description of staff assignments, evaluation resources, or other aspects needed to measure these outcomes. (500 words max.)
 25. Please describe your organizational capacity to measure the outcomes of your sub-subgrantees. This may include a description of staff assignments, evaluation resources, or other aspects needed to measure these outcomes. (500 words max.)
- v. **Program Management**
26. How do you intend to staff the program? If you plan to hire a consultant to facilitate the Leadership Councils, what will be the role of the Jewish Federation staff in overseeing the consultant, Leadership Council, and sub-subgrantees? (500 words max.)
 27. Who will communicate with sub-subgrantees to monitor the programming, expenditures, and evaluation outcomes? How often will this individual communicate and what mode of communication will be used? How will the information required for JFNA's reporting be collected? (200 words max.)
 28. Describe the challenges you anticipate while planning and implementing Leadership Councils and how you may overcome them. (500 words max.)
 29. Describe the challenges you anticipate while monitoring sub-subgrantees and how you may overcome them. (200 words max.)
 30. How will you sustain the Leadership Council at the end of the grant period and continue to build partnerships and relationships in the community? (200 words max.)

b. Budget Application Workbook

*Note: This guidance is best utilized when read in combination with the provided Excel Application Budget workbook comprising the Budget Questionnaire, Budget Template, and Budget Narrative. All three worksheets must be completed for an organization's budget submission to be complete. **Only completed budgets using this template, submitted in an Excel, not PDF, format will be reviewed.***

i. Budget Questionnaire

1. On tab 1 in the Budget Workbook, titled Budget Questionnaire, follow the instructions and respond in detail to each of the questions on the form in the space provided.

ii. Budget Template

1. On tab 2 in the Budget Workbook, titled Budget Template, follow the directions at the top of the page to complete the Excel form. This will be your proposed budget.

- a. The budget should encompass a two-year program budget, covering the period of **January 1, 2023 to December 31, 2023 (Year 1) and January 1, 2024 to December 31, 2024 (Year 2).**

- b. Follow the instructions on the form and input data for the following:

- i. Budget Summary: In the required cells, enter the financial data for Year 1 and Year 2 for the Total Project Budget (Planning Funds+Direct Service Funds+Minimum Match Funds+Overmatch Funds); Total Program Budget (Planning Funds+Direct Service Funds+Minimum Match Funds); Total Program Revenue (amount of JFNA funds proposed for planning and direct services, the applicant's minimum match required and the amount of match funds derived from the subgrantee and the sub-subgrantees, overmatch funds if needed, and total program income without overmatch); and Total Program Expenses (personnel, programming, overhead, and JFNA Training Workshop). Income must equal or exceed (if overmatch is needed) expenses. If overmatch funds are not needed, enter zero in Line 20. The total column will auto-calculate year one and year two financial data.
- ii. Income Chart: Enter the requested funds from JFNA for planning and direct services and the match needed in the required cells for Program Year 1 and 2. Financial matching funds can be comprised of cash and grants. Enter the amount of anticipated financial matching funds in the

appropriate cells corresponding with the correct source of funds. Financial contributions must be received by 6/30/23 for Program Year 1 and 6/30/24 for Program Year 2. In-kind matching funds can be comprised of goods, services, and time. Enter the amount of anticipated in-kind matching funds in the appropriate cells corresponding with the correct source of funds. For each individual staff, consultant(s), and trainer(s) explain as follows - insert title/percentage of FTE/salary including fringe. In-kind matching funds must be received or committed by (if the services or time extends through the end of the calendar year) by 6/30/23 for Program Year 1 and 6/30/24 for Program Year 2. If your organization anticipates needing overmatch funds for year one and/or year two, enter the lump sum amount for overmatch financial and/or in-kind contributions (no itemization needed) in the required cells. Subtotals for each section and the grand total will automatically calculate. Enter zero in cells that are not applicable.

- iii. Expense Chart: Enter the proposed expense for each line item needed in the required cells for Program Year 1 and 2. In the Budget Narrative (tab 3) you will be required to justify each expenditure. Note: 1) Personnel Section: For staff, consultant, and trainer positions requiring funding, insert title/percentage of FTE/salary including fringe. Each position needing funding must be a separate line item. 2) Programming - Other: Use Other (Line 99) for program line items needing funding that are not listed in the budget template. Add additional lines as necessary. 3) Overhead: Overhead may be no more than 10% of the total budget (JFNA funding plus required minimum match) unless your organization has a federal government indirect cost rate which may be used instead. Overhead does not include cellular phones or computers specifically dedicated to the program, short-term rental space for events, office equipment, insurance, or repairs for facilities and vehicles. Subtotals for each section and the grand total will

automatically calculate. Enter zero in cells that are not applicable.

iii. Budget Narrative

1. On tab 3 in the Budget Workbook, titled Budget Narrative, draft a budget narrative using the template provided. The budget narrative explains the rationale of the organization's proposed budget, including sources of program revenue and anticipated program expenses. It describes the numbers and decisions behind the proposed budget and each line item. Enter zero in cells that are not applicable. Failure to describe a proposed line item expense may prevent funding that specific line item.
2. Describe in detail **EACH** line item proposed in the Budget Template. For all personnel positions (including staff, consultants, and trainers) insert title, percentage of FTE, and salary plus fringe.
 - a. Program Income: Describe a feasible and realistic explanation of funding sources for each contribution indicated on the budget.
 - i. Financial Contributions: Financial contributions are comprised of cash and grants. Explain each funding source and whether that funding is secured, in process, or anticipated.
 - ii. In-Kind Contributions: In-kind contributions are comprised of goods, services, and time. Describe in detail all in-kind/non-monetary contributions the organization anticipates receiving and using for this program including but not limited to a breakdown of their fair market monetary value, the source of the contribution and for personnel contributions indicate name, title, percentage of FTE, and salary/wage levels plus fringe for **EACH** staff member, trainer, and/or consultant. Explain whether each contribution is secured, in process, or anticipated. Volunteer hours shall be calculated at the rate of \$29.95 per hour. If your volunteer hourly rate exceeds the national customary rate of \$29.95/hour, such as for pro bono hourly legal fees, explain this rationale in the narrative.
 - b. Program Expenses:
 - i. Personnel: Describe all personnel supported by the JFNA grant, including staff members, trainers, and consultants (excluding direct service providers). Indicate who is filling the position and whether the position is 'current' or 'future' to differentiate between personnel who are currently

employed by the organization and future hires. Enter the name and title of the staff person, trainer, and/or consultant, percentage of FTE, annual salary plus fringe, and total budgeted amount for the line item.

- ii. JFNA Training Workshop: JFNA requires subgrantee participation in each Training Workshop. The next Training Workshop will be in 2023. There will not be a Training Workshop in 2024. Include the breakdown costs of staff travel (e.g., local transportation, lodging and three meals for two days and two nights) to the JFNA Training Workshop. Subgrantees may send as many staff to the Training Workshops as they wish, but any charges above \$4,000 cannot be charged to the JFNA subgrant.
- iii. Programming Activities (events, classes, and meetings): Explain the cost for the following items and activities necessary to implement the program. Please include the number of events, people, and/or items:
 1. Event space
 2. Food and beverages
 3. Activity supplies and materials
 4. Technology for program participants
 5. Entertainment
 6. Marketing for program outreach and events
 7. Printing/copying/postage
 8. Website related to the proposed program
 9. Staff transportation for service delivery
 10. Transportation for proposed program participants (if travel is part of the program)
 11. Contractual (such as an outsourced meal program or third-party home health aides)
- iv. Overhead: Define each item and its cost/rate. Overhead does not include cellular phones or computers specifically dedicated to the program, short-term rental space for events, office equipment, insurance, or repairs for facilities and vehicles. Please indicate if the organization has an indirect cost agreement with the federal government. If applicable, a copy of the indirect

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

c. Work Plan

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

i. Work Plan Definitions:

1. Goal: An aim or desired result of a project/ program, event, or initiative (e.g., improved mental health among family caregivers)
2. Outcome: The measurable change or benefit resulting from the project/program (e.g., 30% decrease in family caregivers reporting that they feel depressed)
3. Major Objective: Primary desired result of a task (e.g., increased organization capacity to provide mental health services to family caregivers)
4. 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)

ii. Work Plan Template Instructions:

(Note: Using the template provided, create a Work Plan for each project/program goal)

1. Complete the first page of the template, listing every goal of the project/program.
2. Complete a separate chart for each goal.
3. Describe the goal and measurable outcome at the top of the chart.
4. Describe the major objectives next to the numbered row, and the main tasks under the objectives. Add rows for tasks and objectives as necessary. Delete unnecessary rows.
5. In the column titled **Lead Person(s)**, note the job title of the individual who will take the lead on accomplishing the task.
6. Indicate the anticipated completion date(s) for the major objectives by completing the black box(es) corresponding with the month(s) when the tasks will be addressed.
7. 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).
8. Plan to spend down the total program budget, which includes JFNA grant funds and matching funds, by the end of Program Year

This work is supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$5,922,000 with 75% funded by ACL/HHS and \$1,974,000 and 25% funded by non-government source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.