



Department of Planning & Community & Economic Development  
**Community Development Division**

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**Coordinated Intake and Assessment**  
**Providing Responses to Homeless or At-Risk Persons in Housing Crisis**  
**Request for Proposals**

RFP # 8282-0-2013/SW

City of Madison, Community Development Division

Issue Date: Monday, April 4, 2013

Proposals Due: Monday, May 6<sup>th</sup>, by Noon

**Purpose**

The City of Madison (the "City") Community Development Division (the "CDD") is seeking proposals from non-profit agencies for the purpose of creating and operating a coordinated intake and assessment system that will provide services to homeless persons and persons at risk of becoming homeless. The purpose is to provide information and referrals to persons experiencing a housing crisis providing a needs-based triage to determine the most appropriate way to address the crisis. It is not expected that the creation of a coordinated intake and assessment system will eliminate wait-lists for housing and services, but that individuals in crisis will be assisted in making arrangements for the interim in an effort to prevent their homelessness or shorten their length of homelessness and time in emergency shelter.

**Background**

Under 24 CFR part 578 Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH): Continuum of Care Program Final Regulations, a centralized or coordinated assessment system is defined as a process designed to coordinate program participant intake, assessment and provision of referrals. A coordinated intake and assessment system will:

- Cover the geographic area, defined as Dane County for this RFP;
- Be easily accessed by individuals and families seeking housing and services;
- Be well advertised; and
- Include the use of a comprehensive and standardized assessment tool.

This definition established basic minimum requirements for the local coordinated assessment system that is to be established and operated by the local Continuum of Care (CoC). The local Continuum of Care, referred to as the Homeless Services Consortium (HSC), will provide policy direction and oversight initially through the Coordinated Intake and Assessment Committee and eventually through a newly formed HSC Board of Directors. For this RFP, the contract will be between the City of Madison and the selected entity for services.

The U.S. Department of Housing and Urban Development (HUD) states that such coordinated systems are important in ensuring the success of homeless assistance and homeless prevention programs in communities. In particular, such assessment systems help communities systematically assess the needs of program participants and effectively match each individual or family with the most

appropriate resource available to address that individual or family's particular needs. HUD and the State of Wisconsin now require each CoC to develop and implement a centralized or coordinated assessment system as a condition for funding.

The coordinated intake and assessment project is intended to be part of Dane County's continuum of services offered within the CoC and expected to serve an increasing number of homeless and at-risk after this pilot project. The pilot project described in this RFP is intended to be the first step in the full implementation of this service. Services contracted for as described in this RFP will be for a prescribed period ending December 31, 2014. It is anticipated that a second RFP will be available prior to the end of the contract period in order to continue and/or expand on this pilot project.

### **Questions/Contact Person**

Questions concerning this request for proposals, the application or the review process should be made IN WRITING to Sue Wallinger, Grants Administrator and sent via email at [swallinger@cityofmadison.com](mailto:swallinger@cityofmadison.com). Responses to questions will be made in writing and distributed to all non-profits who have returned a completed "Intent to Apply" form. This form is located on the last page of this RFP.

### **Goals for Locally Designed Coordinated Assessment System**

- Create an easier and more efficient way to serve persons in a housing crisis;
- Prevent homelessness for persons at risk of homelessness by providing resources to help them maintain their current housing;
- Shorten the length of homelessness for homeless households by early assessment of barriers and efficient use of resources to move households into permanent housing; and
- Bridge any service gaps by providing advocacy as necessary and point of contact for individuals and families in a housing crisis.

### **Pilot Program - Key Design Decisions**

Representatives from homeless housing and service provider agencies have been meeting to determine an outline for the local coordinated intake and assessment system. Included as part of this process was a survey of program applicants and participants regarding how they access services, what works, and what does not work well in the current CoC system. Through this process, a consensus was developed around certain elements of a coordinated system.

1. Coordinated intake and assessment should be primarily: 1) a phone service that can provide skilled screening/triage and 2) a mobile intake and assessment individual/team that can be dispatched to neutral locations to meet individuals and families as necessary. A secondary access point could be at a daytime resource center where homeless and at-risk individuals and families could connect with skilled intake and assessment staff. As it is likely that individuals will not be provided with instantaneous, on-demand assessments, telephone contacts are encouraged as the preferred method of contact.
2. The phone number should be widely publicized throughout Dane County.
3. Services will be provided during routine business hours. For the pilot phase of the program, staff shall be available to answer the telephone a minimum of four (4) hours Monday through Friday. Coverage for night-time and weekend calls is desired, however, at a minimum, callers will be able to leave a message for a return call.

4. The Coordinated Intake and Assessment Committee will continue its work on creating a uniform intake and assessment tool which will be used by the "official" intake and assessment staff as well as a number of HSC member agencies to insure that persons in a housing crisis will encounter "no wrong door". The Coordinated Intake and Assessment Committee will also continue its work on creating a uniform application so as to make the application process for housing and services less difficult and time consuming.
5. The Coordinated Intake and Assessment Committee will conduct a review of the performance of the coordinated activities by June 2014 and reports their findings to the soon to be created Continuum of Care Board of Directors. It is anticipated that the Board will make recommendations to funders of the coordinated activities to assist in future decision making/contracting processes.
6. Individuals and families who are in need of housing and services will be encouraged to call the coordinated intake and assessment program to insure that they receive a comprehensive assessment from a member of the mobile assessment individual or team. However, they may still contact HSC agencies directly to access services. It is anticipated that a by-product of the new coordinated intake and assessment project will be streamlined processes at other HSC emergency shelter, housing and service programs.
7. The target population for the pilot program is households (single adults and families with children) who have been homeless for less than six months. The target population will be provided with an intake and assessment which might be face-to-face or via phone. For a household to qualify as a member of the target population, they must be:
  - Living in Dane County at the time of their first call for assistance; **and**
  - Be literally homeless; **or**
  - Are imminently homeless (within 14 days will lose their nighttime residence); **or**
  - Are fleeing domestic violence, sexual assault, stalking or other violence against the persons in the household.Households should be screened for compliance with HUD's definition for homelessness or at-risk of homelessness as many housing and service programs receive HUD funding. However, they do not have to provide documentation that they meet the definition to receive assistance through the intake and assessment process.
8. All callers with a housing crisis should receive information and referral as possible; households experiencing less than six month of homelessness will receive a face-to-face interview (a telephone interview may be offered instead) for an assessment and referrals.
9. The provider of coordinated intake and assessment services must also take a role in educating HSC agencies around making appropriate referrals, updating HSC staff on available programs' policies and restrictions.
10. If the selected provider of coordinated intake and assessment services delivered through this RFP is a homeless housing and/or service provider, they will establish an identity for the coordinated services separate from their existing housing and service agency. This is intended to be a CoC program that will serve all persons in need and make referrals to a variety of Dane County non-profits. Marketing of the Coordinated Intake and Assessment program and phone number will not be identified with the selected non-profit agency.
11. The provider of coordinated intake and assessment services will enter all clients into Wisconsin ServicePoint (WISP) and be able to provide aggregate client data on existing gaps in

services and participate in addressing these gaps with HSC agencies and funders.

12. The potential volume of calls to a new coordinated intake and assessment telephone line is unknown. As a point of reference in assisting in the preparation of a proposal, we know that:
- Community Action Coalition, the largest agency providing housing counseling in Dane County, reported to the City that they provided information and referral to approximately 12,000 households in 2012 and 15,700 households in 2011;
  - HSC agencies reported that 2,389 homeless households were sheltered in 2012 and 2,200 households were sheltered in 2011; and
  - 77% in 2012 and 64% in 2011 of the homeless sheltered reported being homeless for less than six months.

### **Eligible Costs**

Activities eligible for funding through this RFP include:

- Start-up costs for setting up telephone access;
- Costs associated with publicizing the coordinated access telephone number;
- Staffing costs to provide information and referral (I&R) and intake and assessment services to homeless and at-risk households; and
- Reasonable administrative and space costs to operate the coordinated system.

### **Funds Available and Contract Terms**

The total funds available are \$146,900.

The City CDD will negotiate a contract with the selected non-profit. The term of the contract will be from July 15, 2013 (or as soon as possible following selection of an operator) through December 31, 2014.

The Madison Common Council approved the 2013 budget including \$74,997 in general purpose revenue and Emergency Solutions Grant funds for coordinated intake and assessment. It is anticipated that the Common Council will approve an amount similar in 2014 but the City anticipates a reduction in federal funds. The final amount will be contingent on 2014 Common Council and HUD approval.

Future City funding for this use will likely be through the CDD Summer Funding Process; the next process takes place in the summer of 2014 for 2015-2016 funding.

Agencies submitting proposals will be required to be in compliance with all federal regulations pertaining to the Emergency Solutions Grant program. A copy of the boilerplate contract language is available through the CDD. Contact Sue Wallinger for a copy of the federal requirements via email at [swallinger@cityofmadison.com](mailto:swallinger@cityofmadison.com).

### **Preparing and Submitting a Proposal**

Proposals shall be submitted electronically no later than Noon on Monday, May 6, 2013 to [cdbg@cityofmadison.com](mailto:cdbg@cityofmadison.com). All late or incomplete submittals will be rejected. Submittals should have a subject line of "Coordinated Intake and Assessment Proposal".

The content of the proposal shall include on the cover page:

- Name of Non-profit Agency

- Street Address, City, State, Zip
- Contact Person
- Phone Number
- Email Address

The proposal shall include a narrative no more than (6) pages, not including the cover page and budget page, with the following labeled sections:

1. Proposal
2. Experience of Agency and Staff
3. Collaboration
4. Budget

Provide specific details on the following numbered sections:

#### 1. Proposal

- a. Overview describing the proposed program design and staffing for the project (including detail on anticipated staff time spent on I&R and mobile intake and assessment) and the anticipated number of persons served through information/referral and through mobile assessment services;
- b. Details of a marketing plan that will notify Dane County residents of the pilot program;
- c. Timeline for implementing proposal activities;
- d. Details on where the pilot project will be housed; plan to create a unique identity from your existing non-profit agency (it is not necessary to create a separate organizational unit but rather a separate identity seen by the public; and
- e. Anticipated Outcomes including at least one outcome that addresses the length of homelessness; indicate the source of the data that will be used to measure performance.

#### 2. Experience of Agency and Staff

- a. Qualifications for staff (current or to be hired) that will hold key positions in the coordinated intake and assessment program;
- b. Non-profit experience in providing the proposed or similar services, familiarity and compliance with federal requirements, using Wisconsin ServicePoint, and collecting and analyzing data to assist in program evaluation; and
- c. Detail the agency's financial capability and capacity to fulfill the terms of the contract.

#### 3. Collaboration

- a. Current collaboration and proposed collaboration with other community resources necessary to successfully serve homeless and at risk households;
- b. Efforts to connect persons in need with mainstream resources; and
- c. Quantify your collaboration efforts as much as possible and be specific.

#### 4. Budget

- a. Budget (use attached form); and
- b. All staff employed as part of the coordinated intake and assessment project are required to pay no less than the City's Living Wage. The 2013 wage amount is \$12.19. Annual adjustments to the City's Living Wage amount can be found at:  
<http://www.cityofmadison.com/finance/wage/factsheet.cfm>.

#### **Proposal Selection and Award Process**

Top ranked selected applicants will be invited to make a short presentation to supplement their proposal and be available for questions. These will be scheduled on (insert date). Each applicant will be scheduled for 45 minutes between the hours of (insert times).

Proposals will be reviewed and scored by CDD staff with input from HSC members of the Coordinated Intake and Assessment Committee made up of non-profit agencies and funders not a part of any proposal. The members will make a recommendation to the CDD and to the CDBG Committee. It is anticipated that approval of the selected vendor will be on the June 6, 2013 agenda for the CDBG Committee's action. The CDD and the CDBG Committee reserve the right to reject any or all proposals.

Proposals will be scored using the following criteria:

1. Proposal. A clear description of the proposed activities, realistic timetable for initiating the activities necessary to implement and operate a coordinated intake and assessment program and proposed outcomes with a methodology on collected data needed to report on performance; site the source of the data to be used. A clear description of the marketing program and the ability to create a separate identity for the intake and assessment function apart from the non-profit agency. (maximum 50 points)
2. Experience of Agency and Staff. Demonstrated agency capacity to provide the services proposed as well as experience in federal compliance, use of WISP, and collecting data to inform HSC decisions. Education and experience by key staff in working with the homeless and at-risk population and ability to recruit and hire qualified staff. (maximum 15 points)
3. Collaboration. Description of current and proposed collaboration efforts; demonstrated ability to effectively work with a broad range of HSC and mainstream resource housing and service providers. (maximum 20 points)
4. Budget. Clear and reasonable budget description with sufficient detail to describe the implementation and operation of the pilot project. (maximum 15 points)
5. Local Preference. If the proposal is submitted from a non-profit agency that is based in Dane County, Madison ordinance allows for an additional 5% of total available points (5 points).

## Budget for Proposed Coordinated Intake and Assessment Pilot Program

Please include additional budget detail for each category such as FTE, hours, unit costs, as appropriate. For example: Wages, taxes & fringe for 2.3 FTE Homeless Service Specialists. Feel free to add lines as needed.

Activities	2013	2014	Total
<b>One Time Start-up Costs</b> (quantity description)			
a.			
b.			
c.			
d.			
<b>Start-up Costs Subtotal</b>			
<b>Staff</b> (quantity description)			
a.			
b.			
c.			
d.			
<b>Staff Subtotal</b>			
<b>Operations</b> (quantity description)			
<b>Space</b>			
a.			
b.			
c.			
d.			
<b>Supplies</b>			
a.			
b.			
c.			
d.			
<b>Operations Subtotal</b>			
<b>Other</b> (quantity description)			
a.			
b.			
c.			
d.			
<b>Other Subtotal</b>			
<b>Total Budget</b>			

Additional Information:

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**Intent to Apply**

City of Madison, Community Development Division

In order to receive additional information regarding this RFP, including written responses to questions, please complete the following and send to [cdbg@cityofmadison.com](mailto:cdbg@cityofmadison.com).

Agency Contact

Agency:	
Name:	
Email Address:	