



BApplication for RFP #10054-2021

Community Development Division

Emergency Rental Assistance and Legal Support Services

Submit application to: CDDapplications@cityofmadison.com

Applications are due by **12:00pm on Wednesday August 4, 2021.**

Please limit your proposal and responses to the form provided. Any materials submitted in addition to this application form will not be considered in the evaluation of the proposal. *Do not attempt to unlock or alter this form.*

Applicant Organization:	Community Action Coalition for South-Central Wisconsin		
Contact Person:	Amber Duddy		
Address:	1717 N Stoughton Road, Madison WI 53704		
E-Mail:	aduddy@cacscw.org		
Website:	cacscw.org	Telephone:	608 246 4730
Federal Tax ID or EIN	39-1053827		
DUNS Number	07-893-5681		
Legal Status:	<input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> General Partnership <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Unincorporated Association <input type="checkbox"/> Other: _____		
Tax Exempt Status:	<input checked="" type="checkbox"/> 501 (c)(3) since 1966		

Check which proposed service your organization is intending to provide:

- ☐ Assist eligible applicants through application process, provide outreach and education
- ☒ Evaluate and process completed applications
- ☐ Provide legal support and mediation services as necessary (If interested in providing **only** this service skip to **Program C**)

PART 1: Program Description

Program A: Assist eligible applicants through application process, provide outreach and education *(Administrative costs only)*

1. What Madison neighborhoods and/or vulnerable populations does your organization serve? How will your organization ensure these resources are accessible to those most in need? Be specific (e.g. language capacity, culturally relevant service models, collaboration with other culturally competent community-based organizations, etc.)?
2. What is your organization's experience disbursing and navigating clients through housing-related financial assistance in Madison (e.g. Emergency Rental Assistance, Dane CORE, tenant-based rental subsidies, etc.)?
3. Describe the staffing plan for your proposal, including all leadership, direct service and supportive roles (e.g. finance, intake coordinator, etc.). Include job titles, brief job descriptions necessary experience for each staff member, including for staff who need to be hired?
4. Describe the proposed client-level outcomes, including the total number of people to be served, and timeline of services (e.g. 6 months, 12 months).

Program B: Evaluate and process completed applications *(only complete if interested in providing this service.)*

1. Describe the history of effective organizational and fiscal management of federal funds, including understanding of 2CFR Part 200, "Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards", please identify staff positions and job experience responsible for fiscal management and reporting.

The Community Action Coalition for South Central Wisconsin (CAC) has successfully managed federal grant programs for over 55 years. Over the last seven years WIPLFI has conducted the annual audits, however CAC has had annual fiscal audits every year due to our large federal grants. For nearly twenty years our financial audits have had no findings or concerns. Each year the Board of Directors and Audit Committee review and approve the annual audit. Furthermore, CAC submits our audits to state, federal, government and non-for-profit entities for review. A summary of our financial health is also included in our annual report, and openly available on our website.

In addition to our effective fiscal management of federal funds, CAC commits to bi-annual programmatic and fiscal audits of multiple federal and state contracts. In 2020, the Department of Veteran's Affairs conducted its bi-annual audit and found no findings or concerns in the fiscal records. The auditors commented, this was very rare and spoke to the excellent fiscal management practices of CAC.

CAC ensures not just understanding, but commitment to the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards by committing to high-quality fiscal policies and procedures in our Financial Policy Manual. The manual is reviewed by the CAC Board of Directors via the Fiscal and Personnel Committees, and then is reviewed and approved by the Board of Directors every three years.

CAC is proud of our strong fiscal management of all grant funds, including many large federal grants. To ensure federal funds adhere to administrative requirements and cost principles, the agency uses a four-step approval process for all purchase requests/payments. CAC is committed to the highest standards of financial management, CAC's Finance Director creates and oversees the agency budget and completes and submits all necessary expense/audit and monitoring reports. The Finance Director has been with the organization for over 20 years and has a formal education in accounting and finance. The agency uses a complex chart of accounts to ensure all funds have a separate code to ensure all expenses are charged to the appropriate funding source. The Finance Director attends regular trainings regarding 2CFR Part 200 to stay up to date and maintains regular contact with the agencies outside auditors (WIPFLI) to ensure proper procedures are in place. Serving under the Finance Director are a Planning and Budgeting Coordinator, Financial Coordinator, and Financial Specialist. Having multiple positions allows us to provide stringent checks and balances, separating roles and assuring the highest standard of financial management practices.

The Executive Director and Board review and approve monthly financial statements, prepared, and submitted within 30 days of month end. Additionally, CAC's Executive Director opens and signs off on all financial records, bank statements, and financial reports. Our board chair of the Finance Committee is a high-level officer at a local financial institution, which allows CAC to have a fresh and informed external perspective on monthly financial statements. As CAC has a tripartite Board of Directors, representation on all committees and the board include publicly appointed officials, low-income individuals with lived experience in poverty, and public sector representatives.

2. Describe how your agency monitors and verifies the accuracy and sufficiency of its billing system to assure all claims made are proper and that adjustment is sought when issues are identified.

Community Action Coalition uses Salesforce to process and organize all purchase requests, staff timesheets, grant reports and operations. Salesforce is a commonly used software which allows CAC to customize and perfect our internal processes. For example, CAC is responsible for making hundreds of rent payments for our clients every month. To ensure this happens on time, CAC caseworkers can track client case management plans, log case notes, and initiate rental payments from the client's salesforce portal. The Purchase Request (rent payment) is then sent to the supervisor for approval, then sent to the finance coordinator for review and the finance director for approval. Salesforce allows us to set up dashboards so staff can see when payments are approved/rejected/issued. Additionally, CAC has developed custom dashboards to track funding available for client benefit for each grant, number of clients served, and outcomes related to the grant. Using one system allows for fully electronic (paperless) case management, record keeping, and clean financial records. For instance, CAC staff cannot miscode an expense as salesforce is tied to the chart of accounts, and only allows staff to select appropriate program codes for each funding source.

CAC is excited to use Neighborly, the shared application software, to assure clients do not receive duplicate services or benefits. However, internally the use of Salesforce will allow CAC to track all requests for client services and obtains approval of a supervisor and the finance department before it is paid. This payment records will then link to an individual's case management record and can be reported in real time upon request.

CAC is subject to annual audits through its current funding and has always been in good standing financially. All grant funds the agency receives are booked as a revenue and receivable upon execution date. As grant expenditures are made expense reports are sent to the individual funding sources for reimbursement. The grant receivable accounts are monitored and reconciled frequently by the Finance Director to ensure all funds are received and coded to the proper funding source. The Board of Directors and Finance Committee also review and approve monthly financial records within 30 days of month end.

CAC uses Cougar Mountain Denali, a separate system for its General Ledger and Accounting. This system is separate to allow CAC's financial management to have a strong check and balance approach. Our accounting software is only accessible by three staff in the agency, and it allows CAC to track grant expenses down to penny.

3. Describe staff experience with Federal Funds allocated through the United States Department of the Treasury pursuant to Title V, Section 501 of the Consolidated Appropriations Act, 2021 that has been funding source for Emergency Rental Assistance programs. Please include training plan for new hires to learn about federal requirements.

In 2020, Community Action Coalition received \$7,718,845 in federal funding, including \$723,328 through the Department of Treasury. Of that amount, \$412,008 was awarded through the state of Wisconsin Department of Administration to administer and process applications for the Wisconsin Rental Assistance Program (WRAP). The WRAP program included managing the application process, entering client information into a shared database managed by the Department of Administration, and supporting clients with case management and supportive services.

The supportive services offered by CAC included 3 financial literacy workshops on budgeting during covid held via zoom in both English and Spanish; linking clients to other services; prioritizing and assessing services for clients at imminent risk of eviction or homelessness; offering education on tenants' rights; and making available supports to improve landlord tenant communication. In total, CAC was able to distribute over \$3,000,000 in rental assistance funds between June 8th and November 24, 2020. Using our lean staffing model, CAC was given 72 hours' notice to develop the program application, train staff, develop internal policies and procedures and launch the program. Within the first 24 hours of our pre-application, CAC received 1,500 applications. WRAP clients had to reapply for services monthly resulting in CAC processing over 7,350 applications.

To further support CORE Clients, CAC intends to transition 7 Project Recovery Staff to serve as CORE Counselors. Currently CAC's Project Recovery team speaks 5 languages, and has been outreaching to individuals, communities, schools, and businesses who have been impacted by the pandemic. Funded by the Wisconsin Department of Health Services (DHS), Federal Emergency Management Administration (FEMA) and the Substance Abuse and Mental Health Services Administration (SAMHSA) Project Recovery and CAC staff received extensive training in providing mental health first aid, resource referral, and vaccine education. Our team will work with CORE clients to really listen and assess their needs, beyond rental assistance. Furthermore, CAC will make available \$20,000 in COVID-19 CARES funding to provide additional supports such as clothing vouchers, senior food boxes, transportation and education assistance to CORE clients impacted by COVID-19. The Project Recovery grant is slated to end on August 23, 2021. If funded, CAC would transition key members of Project Recovery to CORE by September 1.

Our training plan for new hires, if funded, is as follows:

Timeline	Milestone	Action
August 9	If CAC is recommended for funding to the Finance Counsel	CAC will interview 18 of our Project Recovery Counselors interested in CORE and select 7 to work on the CORE project.
August 9-September 15	Understand Neighborly	CAC will work with the City to train CORE counselors on Neighborly
August 9-August 30	Policy and Procedures	<p>CAC Program Directors will develop CORE policies and procedures, which will be added to our CAC Program Manual. We request City of Madison review the procedures to assure high-quality standards.</p> <p>CAC will work with City of Madison, WISCAP, Department of Administration to modify current rental assistance policies and procedures to ensure adherence to US Treasury requirements.</p>
August 9-August 30	Training Development	<p>CAC Program Director, Financial Director, Executive Director, CORE Team Lead, and HR coordinator will develop a three-day training for CORE staff. The training will cover policies, procedures and hands-on activities related to CORE.</p> <p>CAC has templates and processes for these types of trainings. City of Madison staff and other CORE partners are welcome to attend.</p>
September 1-September 3	CAC Training	CAC will host a three-day training for CORE Counselors and key personnel on how to use the Neighborly system, program policies and procedures, and how to assess completeness of applications.
September 7	Application Processing Begins	CAC staff will start processing applications and supporting CORE applicants.
September 8-December 2022	Weekly Meetings and on-the-job training	CAC's Emergency Rental Assistance team looks forward to joining weekly and other collaborative meetings. Additionally, staff will meet one-on-one with their team lead bi-weekly and will hold weekly team meetings to stay abreast to changes.

Please note, CAC will leverage other funding sources to keep 7 Project Recovery Staff employed between August 23 and September 1. CAC will use this time to engage the team in development of policies and procedures and will work with City of Madison as desired. Because of our experience with rental assistance, we have a lot of internal capacity to get this project off the ground quickly.

- If additional staff required than described above please add detail of staff needed to evaluate applications and process payments. Include job titles, brief job descriptions necessary experience for each staff member, including for staff who need to be hired and timeline for hiring?

Community Action Coalition currently operates the Project Recovery project, which provides free crisis counseling during the COVID pandemic. Project Recovery operates a multi-lingual hotline seven days a week for sixteen hours a day. Counselors offer mental health support and connection to resources to help with the unique needs COVID-19 poses. During this time, CAC's counselors have taken over 600 calls regarding the CORE rental assistance and have helped clients complete over 60 CORE rental assistance applications. CAC staff are already deeply aware of the program requirements and have ample experience with the CORE. The Project Recovery funding ended in August 23, so those staff could be trained and transitioned to CORE quickly. **Our goal is to have all staff trained by September 3, and processing application by September 7.**

CAC currently has 18 Project Recovery staff who are interested in working on the CORE program, however given the funding available for all three components, we believe we can process \$10,000,000 in rental assistance funds with 7 full time project staff, and 6 administrative staff. If the City recommends CAC for funding on August 9th, CAC will interview the 18 interested staff members and hire 7 to serve on the Emergency Rental Assistance Team. The team will receive a living wage and full benefits which include 100% employee health care (or 75% coverage for families), 5% matching on a competitive 401k program, paid time off, FMLA, short- and long-term disability insurance, vision and dental. Our benefits package and empowering staff engagement practices means our turnover rate is lower than 8%. Unlike many other agencies, we have not seen a dip in applications- receiving over 100 applications for every open position. In fact, the Project Recovery team has been with CAC for over a year already, and when surveyed very much want to stay a part of the agency long term. For that we are deeply proud.

The Emergency Rental Assistance team would include 6 rental assistance/CORE counselors who will work with clients to process and enter applications. The CORE Counselors would be managed by one team lead, who would manage daily operations, directly supervise counselors, and review applications. CAC's Program Director, who worked on WRAP would directly manage the project and have the final approval of all applications. Additionally, the program will support 2 CAC intake specialists. Our intake specialists are bi-lingual and trained to support clients in crisis. The Intake Specialist will be able to answer client calls and assist with application questions. CAC's Finance Coordinator will process all rental assistance payments and track grant expenses per our usual weekly process. The Finance Director will provide financial auditing and oversight of the agency's expenditures related to CORE. This includes both rental assistance payments and the CORE grant. Finally, CAC's Executive Director will ensure overall program success and act as a liaison to the City CORE management team.

As a Community Action Agency, many of our Administrative Costs are supported by the Federal Community Services Block Grant. CAC was founded out of a national movement in the 1960's led by the Johnson Administration's efforts to end poverty. The unique founding of CAC means is part of a network of 1,000 sister agencies and that we are legislatively required to fill gaps in community services. Both Dane County and the City of Madison have appointed representatives serving on CAC's board of directors. In 1966, Dane County elected CAC to serve the county, entering into a long-term 55 year partnership to collaboratively eliminate poverty. For CORE, CAC will leverage CSBG to support administrative operations and pledges a match of \$58,603 over the 16-month project.

CAC is happy to provide resumes and names of existing staff upon request.

Program C: Provide legal support and mediation services as necessary *(only complete if interested in providing these services.)*

1. Describe the project for which funding is being requested. Include project details, the need addressed by the project, and the populations to be served.
2. Describe the agency's experience in administering this type of program. Describe the qualification of the staff assigned to the proposed program, including their knowledge and experience.
3. What Madison vulnerable populations does your organization serve? How will your organization ensure these resources are accessible to those most in need? Be specific (e.g. language capacity, culturally relevant service models, collaboration with other culturally competent community-based organizations, etc)?

PART 2: Project Budget

BUDGET EXPENDITURES	TOTAL PROJECT COSTS	AMOUNT OF CITY \$ REQUESTED	AMOUNT OF NON-CITY REVENUE	SOURCE OF NON CITY FUNDED PORTION
A. Personnel Costs (Complete Personnel chart below)				
1. Salaries/Wages (show detail below)	449,307	427,769	21,583	Community Services Block Grant-CARES
2. Fringe Benefits and Payroll Taxes	147,282	140,174	7,108	Community Services Block Grant-CARES
B. Program/Operations Costs				
1. Program supplies and equipment	6,042	1,586	4,456	Community Services Block Grant-CARES
2. Office Supplies	1,000		1,000	Community Services Block Grant-CARES
3. Marketing				

BUDGET EXPENDITURES	TOTAL PROJECT COSTS	AMOUNT OF CITY \$ REQUESTED	AMOUNT OF NON-CITY REVENUE	SOURCE OF NON CITY FUNDED PORTION
4. Rent/Utilities/Telephone	4,695		4,456	Community Services Block Grant-CARES
5. Other (explain*)				
C. Direct Rental Assistance				
1. Rental Assistance	10,000,000	10,000,000		
2. Other (explain*):	20,000		20,000	Community Services Block Grant-CARES/USDA CFSP
D. TOTAL (A + B + C)	10,628,326	10,569,529	\$58,603	

*Explanation of "Other" expenses:

Staff will screen clients for eligibility in other CAC programs such as clothing vouchers, Coats for Kids, senior food boxes, etc.

PART 3: Personnel Chart

Identify and describe the role of key staff positions and affiliate partners who would become directly responsible for the various aspects of the contract, if awarded. For each position, please note if duties will be provided by a current staff position (no additional FTE), a new position, or expanded hours for a current staff position (additional FTE) in the hiring plan column.

Title of Staff Position	Hiring Plan (Current, New, or Expanded)	Expected hours to be spent in this project per week	Proposed Hourly Wage	Role With This Project
Executive Director (MATCH FUNDING)	Current	4	\$45	Executive management, support, and review.
Finance Director (MATCH FUNDING)	Current	4	38	Financial Auditing and oversight of agencies expenditures
Finance Coordinator	Current	8	\$24	Process all payments and track grant expenses

Title of Staff Position	Hiring Plan (Current, New, or Expanded)	Expected hours to be spent in this project per week	Proposed Hourly Wage	Role With This Project
(2) Intake Specialist	Current	4	\$18.50	Answer client calls and questions as to status of application.
Program Director	Current	10	\$29	Final Review and approval of all applications. Program Management
(1) Team Lead	Current	40	\$25	Manage daily operations and directly supervise counselors. Review and approve all applications.
(6) Rental Assistance Counselors	Current	40	\$19	Work with clients to process and enter applications.

CAC currently has 18 FEMA funded staff interested in this project. We will interview existing staff and hire internally for the Rental Assistance Counselors. The team currently speaks 5 languages and has received extensive training with the Project Recovery project in Wisconsin.