



## Application for RFP #10054-2021

### Community Development Division

#### Emergency Rental Assistance and Legal Support Services

Submit application to: [CDDapplications@cityofmadison.com](mailto: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.*

|                                |  |                   |              |
|--------------------------------|--|-------------------|--------------|
| <b>Applicant Organization:</b> | Urban Triage   |                   |              |
| <b>Contact Person:</b>         | Brandi Grayson   |                   |              |
| <b>Address:</b>                | 2312 S Park St, Madison WI, 53713  |                   |              |
| <b>E-Mail:</b>                 | bgrayson@urbantriage.org   |                   |              |
| <b>Website:</b>                | <a href="https://urbantriage.org/">https://urbantriage.org/</a>  | <b>Telephone:</b> | 608-520-0741 |
| <b>Federal Tax ID or EIN</b>   | 84-3297905   |                   |              |
| <b>DUNS Number</b>             | 117725095  |                   |              |
| <b>Legal Status:</b>           | <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> General Partnership<br><input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Unincorporated Association <input checked="" type="checkbox"/> Other: <u>Non-Profit</u> |                   |              |
| <b>Tax Exempt Status:</b>      | <input checked="" type="checkbox"/> 501 (c)(3) since Nov 2019  |                   |              |

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.)?

**We are a nonprofit that provides transformational education and direct services in the Greater Dane County area. We were founded and are operated by members of the community we serve. Consequently, we understand the needs of the people we serve. Our focus is on Black families and children because they are the most vulnerable. At the same time, providing services and support for all. We are located on the south side of Madison near the transfer point. Currently, we provide pop-ups throughout the city of Madison supporting the CORE program. Tenants and landlords receive direct, one-on-one assistance with the application (both in-person and over the telephone). Urban Triage is in a unique position to provide emergency assistance to Madison residents. Our organization has built trust within the community and within systems - advocating and creating solutions to life-changing issues. Since we are deeply rooted in our communities, we connect to a diverse population that is currently under-represented. Our success in the community distinguishes us. Through a robust, system-wide approach to tackling housing stability, we aim to enhance access to resources and support by identifying and connecting community members to services within our collaborations (Dane County Collaboration of Black Service Providers (DCCBSP--10 direct service organizations) and the Homeless Consortium) and throughout other networks. Furthermore, we approach housing stability from a trauma informed, racial equity and culturally relevant perspective. In addition, as a provider of rental assistance, we understand the complexity and logistics involved in making the application process accessible and meeting all federal and local requirements. In anticipation of distributing additional funds, we have created systems and purchased systems for collecting, documenting, and reporting rental assistance.**

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.)?

***Currently, we process the most applications for CORE. We have done so since February 2021. To support applicants, TRC often refers them to Urban Triage. For four years, Urban Triage has been providing emergency rental assistance. Over the last 16 months, as a result of COVID-19, we have distributed over \$150,000 to community members and helped over 1000 families to access resources. Also, Urban Triage is responsible for spearheading the DCCBSP, which was created to respond to COVID-19 and its impact on the Black***

*community. Four of our DCCBSP organizations currently provide administration support to the CORE program. Through the collaboration, we've provided direct access points to resources and services, reducing stress and obstacles associated with accessing services. Moreover, Urban Triage has been awarded an \$10.7 million rental assistance contract with Dane County Human Services. In response, we've been working closely with the City of Madison and Dane County to design and implement a program that's low barrier and human centered.*

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?

*Urban Triage currently employs 10 full-time staff and one part time staff member. Quetta Rogers coordinates the existing rental assistance efforts and she would support and onboard new staff in order to ensure success. Quetta has recently been promoted to Operations Director and Sharmecia Brown has been promoted to take her place as Program Manager. Quetta is currently training Sharmecia in preparation for CORE 2.0.*

***The City grant will support 13 positions and contractors. \*Nine of these positions are new to support standing up the program.***

- *Program Manager: Manage and oversee the needs and expectations in the RFP. Including all staff listed below.*
- *Operations Director: Oversees the management of the Program and is the 3rd layer of approval required prior to checks being cut.*
- *Founder/CEO: Oversees implementation, development and management of operations.. She also provides project management to ensure deadlines are met, reports are accurate and all equipment and IT requirements are met.*
- *\*2 Housing Stability Outreach Specialist: Focus on outreach, connections, negotiating agreements between landlords and tenants and supports those seeking rental assistance through the process.*
- *\*Housing Stability Compliance and Reporting Assistant (Contract Manager): Supports the Housing Stability Program Manager in all elements of documentation verification, data collection and reporting.*
- *\*Quality Assurance Specialist: Reviews application for completeness and provides phone coaching for phone support.*
- *\*2 phone support Specialist: Provides outstanding customer service support for folks who have questions about the process, requirements and application.*
- *In House Accountant--Provides financial information to management by researching and analyzing accounting data; preparing reports. Reconciles financial discrepancies by collecting and analyzing account information. Secures financial information by completing database backups. Maintains financial security by following internal controls.*
- *Contractor QTI--to handle HR and payroll of all employees effective 8/27/21*
- *Contractor Number for Non Profits--Currently provides accounting services and will*

*continue to do so as a 2nd set of eyes to ensure compliance and exceptional fiscal management.*

- *Marketing firm--6AM Marketing firm will help us create and implement successful marketing strategies. This often begins with **marketing research** to understand what is and is not working in the current marketing plan, followed by demographic research to create a complete **ideal customer profile**.*

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).

***We look to serve over 1100 people within the City of Madison over the next 12 months. Via pop ups, phone support and outreach.***

**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 2 CFR 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.

**Brandi Grayson CEO has been providing fiscal management and reporting of current federal funds through the City of Madison since February along with reporting for 4 other organizations. Brandi has been the responsible fiscal manager of Urban Triage's \$1.2 million budget which includes city, state and federal reporting requirements. Since COVID 19 and the current \$10.7 million contract, it has become her business and responsibility to understand "Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards". As a result, we've contracted with Neighborly Software (along with the city of Madison) which ensures all reporting requirements are being met via the portal. Ensuring we capture all the required information. We'll also hire a Contract Assistant to ensure reporting deadlines and requirements are met and an in-house Accountant. We currently contract out accounting services to Numbers for Non profit who will continue to be our 2nd set of eyes. The database, Neighborly, allows us to streamline the application process and move applicants quickly through the process. It also maintains accurate records of applicant interactions, call log, prioritizes applications based on SES, includes initial assessment, provides prompts and questions to phone support to ensure all federal requirements and guidelines are met. It creates task lists, sends out emails, keeps track of clients served and maintains calculations of funds spent. ALL city funds will be deposited into its own account to prevent commingling of funds. Neighborly also ensures compliance of non duplication of services by integration of previous data (applicants) and geo coordinates of city and county boundaries. Urban Triage currently meets weekly with CDD staff coordinating services and providing input. We'll be meeting weekly with CDD and DCHS to ensure collaboration and coordination of CORE 2 starting 8/4/2021.**

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.

Neighborhoodly Database automatically creates tasks for reviewing applications. Additionally, it sends reminders to Phone Specialists, Quality Assurance Specialists, and applicants regarding missing documents and next steps. As soon as all documents are received, the database automatically sends the application to Quality Assurance for review. It appears on their dashboard as a task. Then Quality Assurance will either send the application back to applicants for more information or to Bill Pay for processing. Urban Triage processes all rental assistance requests using Billpay.com. All Bill Pay payments must be verified twice and approved by a third party before the check can be issued. The Quality Assurance team must review every rental assistance request before it is submitted to bill pay to ensure it meets federal requirements and is legible. Once the payment request has been entered into bill pay, it is reviewed a second time by another member of Quality Assurance to ensure accuracy. If errors are found or adjustments are needed the Quality Assurance Specialist will correct and or readjust the payment or send back to applicant or reach out to landlord for additional information. Once documents are received the Quality Assurance process starts again. will send it to another Quality Assurance Specialist for another review for accuracy. Upon review, a payment request is sent to the CEO, Operations Director and Contract Manager for final review and approval. After they review and approve the payment, a check is mailed by Billpay.com.

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 the funding source for Emergency Rental Assistance programs. Please include a training plan for new hires to learn about federal requirements.

Currently we work with the City of Madison assisting with CORE 1 applications. Providing community members with advocacy (obtaining documentation from landlords & navigating TRC process) and with one on one assistance with the application process. In addition, we do pop-ups across the city in partnership with property management companies and landlords. We have 5 employees that assist with the CORE program. Offering, one one one assistance to tenants and landlords. All new hires will be trained in the Neighborhoodly database in partnership with the City of Madison. The Neighborhoodly database provides and lists all federal requirements and updates automatically. Via our Neighborhoodly training new hires will learn about federal requirements. Urban Triage will also provide all new hires with an additional 4 hour training on federal requirements. All training is recorded and will be utilized to train folks who come after the live training. Folks will also receive 2 hrs of training on how to recognize fraudulent documents and what to do when you think fraud has been committed. All new hires will be provided a script to work from as well as a FAQ sheet which includes scripts for responses to questions. In addition, they'll receive 2 days of practice training. Live calls of applicants. All personnel will also go through a version of the Supporting Healthy Black Families Workgroup. They learn about trauma and how it shows up in them and the folks we serve. They also learn new ways of listening, hearing and responding in difficult situations. In addition to learning new communication skills the workgroup also provides new hires with a deeper understanding of white supremacy racism and how to navigate outside of it. At Urban Triage we proud ourselves on developing our staff to be trauma informed in their work and in their lives. It's imperative that all employees of Urban Triage have a foundation and understanding of what we're creating and causing in the world and in our work. Work that is grounded and founded in transformation. Work that can't be done effectively or impactfully if we don't address our own demons and trauma.

4. If additional staff is required than described above please add details 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?

**This is the total number of staff we'll hire by 12/2021. It includes ALL staff for the CORE 2.0 program. City Staff are listed above. And can be distinguished by the \*.**

**6 Phone Support Specialists ---- They will answer calls and provide support and assistance with applications. We've hired 3 individuals so far. 1 started yesterday 8/3/21. 2 will start at the end of August. We have 5 interviews scheduled next week. We'll onboard the other 3 folks by the 2nd week of September. Customer service experience required.**

**4 Quality Assurance Specialists (2 will be promoted to Lead) ----They will be cross trained on phone support and will review ALL applications for accuracy and completeness. They will also be responsible for coaching phone support staff. Pulling calls and coaching Specialists on customer service, federal guidelines and anything else that comes up during a call. They'll be responsible for sending rental assistance requests to bill pay for processing. They are also responsible for reviewing the bill pay request again for accuracy before the request is sent for final approval. Quality Assurance Lead will provide coaching to everyone including Quality Assurance Specialists. 1 was hired yesterday. Interviews scheduled for next week. She'll start at the end of August. The other 3 will be staggered based on the database schedule and roll out. Call center experience and coaching required.**

**1 Project Manager ----will be responsible for overseeing all aspects of the project. They will be responsible for making sure equipment is installed and working properly. They will be responsible for IT, equipment and software. Interviewing now. Brandi and Executive Assistant currently fill this role. Previous experience managing large projects required.**

**1 Contract Manager ---manages contract requirements and reporting requirements. Interviewing.**

**1 Administrative Asst---Performs administrative tasks for managers and Quality Assurance. Current staff.**

**2 Accountant ----see above Interviewing for inhouse accountant. Currently contract out to Numbers for non profit. Would like to have someone hired and on board by 9/20/21.**

**2 Outreach Workers ---see above. We have one staff member that will perform outreach. We need to hire 1 more. They're responsible for pop ups, community engagements and building collaborations and partnerships with landlords and agencies.**

**1 Marketing Firm ----will be responsible for promoting Hired starts next week.**

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

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.

We are not doing this part. But here is other info from the RFP you might need:

-Funds Available Up to \$14 million of direct assistance and \$1.2 million of administration support.

-Evaluation Rubric:

Targeting- 30%

Basis: neighborhoods/vulnerable populations most disproportionately experiencing housing instability and impacted by COVID-19

Experience- 60%

Basis: programmatic (20%), federal (15%), existing CDD community partner in Dane CORE (25%)

Leverage- 10%

Basis: Program budget leverages other financial resources

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 |
|--|-----------------------|-----------------------------|----------------------------|-----------------------------------|
| <b>A. Personnel Costs (Complete Personnel chart below)</b> |                       |                             |                            |                                   |
| 1. Salaries/Wages (show detail below)                      | \$1,027,900.00        | \$220,000.00                | \$807,900.00               | DCBS                              |
| 2. Fringe Benefits and Payroll Taxes                       | \$282,930.20          | \$80,837.20                 | \$202,093.00               | DCBS                              |
| <b>Total</b>   | <b>\$1,310,830.20</b> | <b>\$300,837.20</b>         | <b>\$1,009,993.00</b>      | <b>DCBS</b>                       |
| <b>B. Program/Operations Costs</b>                         |                       |                             |                            |                                   |
| 1. Program supplies and equipment                          | \$617,100.00          | \$163,000.00                | \$454,100.00               | DCBS                              |

|  |                        |                       |  |             |
|--|------------------------|-----------------------|--|-------------|
| 2. Office Supplies   | \$60,000.00            | \$17,000.00           | \$43,000.00                              | DCHS        |
| 3. Marketing   | \$175,000.00           | \$100,000.00          | \$75,000.00                              | DCHS        |
| 4. Rent/Utilities/Telephone  | \$63,000.00            | \$25,200.00           | \$37,800.00                              | DCHS        |
| 5. Other (explain*) Audit, Accounting, Contractors, Insurance, Cleaning, New furniture for new staff, PPE)                             | \$237,000.00           | \$87,000.00           | \$150,000.00                             | DCHS        |
| <b>Total</b>   | <b>\$1,152,100.00</b>  | <b>\$392,200.00</b>   | <b>\$759,900.00</b>                      | <b>DCHS</b> |
| <b>C. Direct Rental Assistance</b>   |                        |                       |  |             |
| 1. Rental Assistance   | \$15,700,000.00        | \$5,300,000.00        | \$10,400,000.00                          | DCHS        |
| 2. Other (explain*):<br>Administration cost for city funds 2 % to stand up program and asst with other providers training and outreach | \$212,000.00           | \$212,000.00          | DCHS Admin cost is in the operation cost |             |
| <b>D. TOTAL (A + B + C)</b>  | <b>\$18,162,930.20</b> | <b>\$5,993,037.20</b> | <b>\$12,169,893.00</b>                   | <b>DCHS</b> |

\*Explanation of "Other" expenses:

RFP Directions for Budget: Eligible administrative costs include personnel, marketing and associated operation and space costs used to reach out to people and connect them to Dane CORE 2.0 and other housing related services.

### 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.

| <b>Title of Staff Position</b> | <b>Hiring Plan<br/>(Current, New,<br/>or Expanded)</b> | <b>Expected<br/>hours to be<br/>spent in this<br/>project per<br/>week</b> | <b>Proposed<br/>Hourly Wage</b> | <b>Role With This<br/>Project</b> |
|--------------------------------|--|--|---------------------------------|-----------------------------------|
| CEO                            | See RFP Narrative                                      | 20   | \$50.00                         | See RFP Narrative                 |
| Operations Director            | See RFP Narrative                                      | 25   | \$26.92                         | See RFP Narrative                 |
| Program Manager                | See RFP Narrative                                      | 40   | \$22.00                         | See RFP Narrative                 |
| Quality Assurance Lead         | See RFP Narrative                                      | 40   | \$19.75                         | See RFP Narrative                 |
| Quality Assurance Support      | See RFP Narrative                                      | 40   | \$19.00                         | See RFP Narrative                 |
| Trainer                        | See RFP Narrative                                      | 15   | \$19.00                         | See RFP Narrative                 |
| Phone Support Lead             | See RFP Narrative                                      | 40   | \$19.75                         | See RFP Narrative                 |
| Phone Support 2 FT             | See RFP Narrative                                      | 40   | \$19.00                         | See RFP Narrative                 |
| Operations / Admin Support     | See RFP Narrative                                      | 40   | \$18.00                         | See RFP Narrative                 |
| Contract Manager               | See RFP Narrative                                      | 20   | \$20.00                         | See RFP Narrative                 |
| Outreach Team 2                | See RFP Narrative                                      | 40   | \$18.00                         | See RFP Narrative                 |
| Project Accountant             | See RFP Narrative                                      | 30   | \$30.00                         | See RFP Narrative                 |
| Contract Accountant            | See RFP Narrative                                      | 20   | \$200.00                        | See RFP Narrative                 |
| QTI --HR and Payroll           | See RFP Narrative                                      | 10   | \$100.00                        | See RFP Narrative                 |