

REQUEST FOR PROPOSAL (RFP)

For: Pathways to Independence Regional Grants

RFP # G1636DLTC-LS

**Issued by:
STATE OF WISCONSIN
DEPARTMENT OF HEALTH AND FAMILY SERVICES, DIVISION
OF LONG TERM CARE, BUREAU OF AGING AND DISABILITY
RESOURCES, OFFICE OF INDEPENDENCE AND
EMPLOYMENT**

**Proposals must be submitted
no later than 4:30 PM CT
May 30, 2008**

**For further information regarding this
RFP contact Samantha Ninnemann at (608) 266-5209.**

LATE PROPOSALS WILL BE REJECTED

**TIMELINE FOR RFP ENTITLED
Pathways to Independence Regional Grants**

- (4/28/08) Anticipated mailing date of RFP
- (5/8/08) Notice of Intent to submit a proposal deadline
- (5/13/08) Deadline for questions submitted for conference call
- (5/16/08) Proposers' conference call
- (5/30/08) Due date for proposals
- (6/20/08) Final award letters mailed
- (6/20-7/07/08) Public inspection of proposals
- (6/27/08) Letters of intent to protest are due.
- (7/07/08) Final date for appeals (10 working days after Award Letters are postmarked)
- (7/01/08) Estimated start date

PART I

GENERAL INFORMATION

1.0 INTRODUCTION AND BACKGROUND

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for a Pathways to Independence Regional Grant. The Division of Long Term Care intends to use the results of this process to award contracts for grants in seven regions throughout the state.

The Pathways to Independence project within the Wisconsin Department of Health and Family Services, Division of Long Term Care is offering grant funds up to \$440,000 statewide to decrease barriers to and increase opportunities for person-centered, integrated employment in order to support people with disabilities in achieving their desired employment outcomes.

Governor Doyle has set a goal to expand statewide the Family Care managed long-term care program for elders and people with disabilities. Long-term care consists of services and supports that people need to meet their daily needs, including their employment goals. The Pathways to Independence grants will assist the seven regions of the State as they prepare for the expansion of managed long-term care.

The mission of Pathways to Independence is to develop a comprehensive system that:

- Maximizes employment of people with disabilities
- Increases the state's labor force by including people with disabilities
- Protects and enhances workers' healthcare, other benefits and needed supports

Pathways to Independence has designated seven Pathways Regions and is making grants available in each of these regions throughout the State. The Pathways Regions are designated to include the following counties:

North Central Region: Clark, Langlade, Lincoln, Marathon, Portage, Taylor, Waupaca, and Wood.

Northern Region: Ashland, Bayfield, Forest, Iron, Oneida, Price, Sawyer and Vilas

Northeastern Region: Brown, Calumet, Door, Florence, Fond du Lac, Kewaunee, Manitowoc, Menominee, Marinette, Oconto, Outagamie, Shawano, Sheboygan, and Winnebago.

Northwestern Region: Barron, Burnett, Chippewa, Douglas, Dunn, Eau Claire, Pierce, Polk, Rusk, St. Croix, and Washburn.

South Central Region: Adams, Columbia, Dane, Dodge, Green, Green Lake, Jefferson, Marquette, Rock, Sauk, and Waushara.

Southeastern Region: Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, and Waukesha

Southwestern Region: Buffalo, Crawford, Grant, Iowa, Jackson, Juneau, La Crosse, Lafayette, Monroe, Pepin, Richland, Trempealeau, and Vernon.

1.1 AVAILABLE FUNDS

The Pathways to Independence Regional Grant project is funded by the Wisconsin Medicaid Infrastructure Grant. A total of \$440,000 is available to make a minimum of seven grant awards under this RFP. The \$440,000 is divided into the following project categories:

- 1) Up to \$60,000 will be available to each of six Pathways regions, including North Central, Northeastern, Northern, Northwestern, South Central and Southwestern.

Several grants less than \$60,000 may be awarded per region. The Division of Long Term Care reserves the right to make one award of \$60,000 per region. Total funds awarded to all applicants in these six regions will not exceed \$360,000.

- 2) Up to \$80,000 will be available to the Southeastern Region. Several grants less than \$80,000 may be awarded in this region. The Division of Long Term Care reserves the right to make one award of \$80,000 in this region. Total funds awarded to all applicants in this region will not exceed \$80,000.

Proposers may apply for the maximum amount allowed in a region. Proposers may compete for funding in more than one region and may submit more than one proposal in a region. However, proposers submitting multiple applications must clearly demonstrate the capacity to concurrently meet the requirements of all proposed activities in all submitted applications.

Funds awarded under this solicitation will be for the period of July 1, 2008 through December 31, 2008.

1.2 ISSUING AGENCY

This RFP is issued for the State of Wisconsin by the Division of Long Term Care. The Division is the sole point of contact for the State of Wisconsin during the selection process.

1.3 PROJECT GOALS

All successful proposals for Pathways to Independence Regional Grants will address one or more of the following strategic priorities and key components of the Pathways to Independence Strategic Plan.

Pathways to Independence Strategic Priorities

When the Pathways to Independence Strategic Plan is implemented, Wisconsin will be the standard by which other states are measured in these areas:

1. Support for the principles of universal design and the creation and use of assistive technologies to enhance independence and productivity for people with disabilities.
2. The number of exceptionally prepared and qualified employees available for the workforce of the 21st century through the development and implementation of a seamless system of education and training for students with disabilities at all levels, from pre-kindergarten to post-secondary education.
3. The extent of collaboration among all service providers, with a person-centered focus and a specific plan for a unified system which serves both employers and people with disabilities, resulting in a more productive work environment.
4. The extent to which employers, policymakers, insurers and people with disabilities are engaged in increasing access to long-term care and other employee benefits.
5. The creation and provision of effective and practical technical assistance and accessible, on-going supports for employers who intentionally and successfully employ and accommodate people with disabilities.
6. The level to which employers and the public are informed and educated about the contributions of people with disabilities, their economic potential and positive impact on the labor force.

Successful proposals will also address the following key components of the strategic priorities of the Pathways to Independence Project:

- Incremental Systems Change
- Collaboration
- Transparency
- Local Solutions
- Leadership
- Sustainability

In addition to the strategic priorities, proposers are encouraged to address one or more of the issue areas for each Region, which are outlined in Appendix 1 to this Request for Proposals. Proposals that successfully address one or more of the issues described for the Region in which the proposer is applying will receive up to 10 extra points.

Grant funds may be used for project staff salaries, consultant fees, data collection and analysis, meetings, supplies, project-related travel and other direct project expenses, including a limited amount of equipment deemed essential to the project. **Grant funds may not be used to provide direct services**, to construct or renovate facilities, for lobbying, or as a substitute for funds currently being used to support similar activities. Funding received through this grant may not be used to supplant current local, state or federal funds received by the applicant. Funds must be used by December 31, 2008.

1.4 PROJECT DESIGN

The Division is soliciting proposers that demonstrate innovative approaches for expanding and/or enhancing the capacity of the Region to support people with disabilities in achieving their desired employment outcomes. Increased capacity to provide integrated employment will support the expansion of managed long-term care throughout the State.

Regional collaborations and partnerships are encouraged. Proposers must have representation from people with disabilities. The Division strongly encourages participation from local officials (elected, employed or appointed). In addition, a broad cross section of the community should be represented, such as civic groups and faith based groups as well as agencies that represent education, housing, transportation and other interests that support members of the targeted population.

1.5 DEFINITIONS

The following definitions are used through the RFP.

Division means the sub unit within DHFS, the Division of Long Term Care.

Bureau means the work unit within the Division which is using the RFP, the Bureau of Aging and Disability Resources.

Region means the Pathways to Independence designated Pathways Region.

Proposer means an organization submitting a proposal in response to this RFP.

State means State of Wisconsin.

Grant Recipient means proposer awarded funds for direct benefit of the community.

Proposal means response to RFP.

1.6 WHO MAY SUBMIT A PROPOSAL

1. Applications will be accepted from each of the seven Pathways regions of the state. Proposers must currently provide a substantial (50%) portion of services or activities in the counties included in the region for which they are proposing.
2. Applicants may include government agencies, tribes, counties, municipalities, non-profit organizations, for-profit organizations, service providers, businesses, community organizations and civic organizations.
3. The lead agency for the application must hold a certificate of good standing with the Secretary of State or have a fiscal agent with such a certificate, and be eligible to receive federal funds. Applicants must be willing to provide all necessary program and financial reports. Municipalities are also eligible to apply and need not have a certificate of good standing.

II. SPECIAL PROGRAM REQUIREMENTS

2.0 Grantees will be required to follow the Pathways to Independence guidelines for deliverables and evaluation, which will be outlined in the grant contract.

III. GENERAL PROGRAM REQUIREMENTS

The following items are required to assure the continuation of funds. These requirements will form part of the contract to the State/County Contract awarding these funds. Failure to comply with these requirements can result in disallowances and/or termination of the agreement for funds.

3.0 ACCEPTANCE OF PROPOSAL CONTENT

Grant recipients receiving awards will be mandated to meet all requirements of this RFP.

3.1 ALLOWABLE COSTS

A grant recipient will be required to comply with the Department of Health and Family Services Allowable Cost Policy Manual.

3.2 CAPITAL EQUIPMENT

Funds may be used to purchase capital equipment with prior written approval from the Division. Capital equipment costs are defined as all costs associated with the acquisition of assets having a value in excess of \$5,000, and a useful life in excess of one year. Funds can be used to purchase/rent supplies such as adaptive and communication equipment, and make housing modifications.

3.3 SALARIES

Funds cannot be used to supplant current salaries. Funding is for the provision of grant activities only. Indirect costs may not exceed 9% of staff salaries and fringe benefits.

3.4 REPORTS

Reports of both programmatic and fiscal activity will be required for the purpose of documenting the satisfactory meeting of project objectives, in accordance with the application. Reporting requirements will be specified in the agreement between the successful proposer and the Division. Failure of the successful proposer to accept these obligations may result in cancellation of the award.

The grantee shall, at the option of the Division, appear before DHFS administrators to clarify findings and to answer any questions at any time during the grant agreement or after the grant agreement is completed.

3.5 NEWS RELEASES

News releases pertaining to this award or any part of the proposal shall not be made without the prior written approval of the Division.

Copies of any news releases regarding this grant during the contract year(s) will be submitted to the Division.

3.6 LEGAL SERVICES

Grant funds can be used to provide legal advice to the recipients but the funds cannot be used to support any legal actions taken against the federal or state government.

3.7 EMPLOYMENT

The recipient, if not a state agency, will not engage the services of any person or persons now employed by the state, including any department, commission or board thereof, to provide services relating to this agreement without the written consent of the employer of such person or persons and of the Division. If the recipient is a state agency, funds awarded may not supplant existing funds for programs serving people with disabilities.

3.8 SUBCONTRACTING

If the applicant plans to use subcontractors, this should be clearly explained and costed out separately in the application. However, the primary contractor will be responsible for contract performance whether or not subcontractors are used.

3.9 TERMINATION OF AGREEMENT

The Division may terminate this agreement at any time at its sole discretion by delivering thirty (30) days written notice to the grant recipient. Upon termination, the Division's liability will be limited to the pro rata cost of the services performed as of the date of termination plus expenses incurred within the prior written approval of the Division. In the event that the grant recipient terminates this agreement, for any reason whatsoever, it will refund to the Division within fourteen (14) days of said termination, all payment made hereunder by the Division to the grant recipient for activities not completed. Such termination will require written notice to that effect to be

delivered by the grant recipient to the Division not less than thirty (30) days prior to said termination.

3.10 INCURRING COSTS

The State of Wisconsin is not liable for any cost incurred by proposers in replying to this RFP.

3.11 WAIVER OF TECHNICALITIES

The RFP Evaluation Committee reserves the right to accept or reject any or all responses to the RFP and waive minor technicalities. The determination of whether an RFP condition is substantive or a mere technicality shall reside solely with the RFP Evaluation Committee.

3.12 AFFIRMATIVE ACTION

Successful proposers who are awarded contracts of twenty five thousand dollars (\$25,000) or more shall have included in their contracts the following clause:

"A written affirmative action plan is required as a condition for the successful performance of the contract. Excluded from this requirement are grant recipients whose annual work force amount to less than twenty five employees. The affirmative action plan shall be submitted to the state agency within fifteen (15) working days after the award of the contract."

3.13 REASONABLE ACCOMMODATIONS

The Department will provide reasonable accommodations, including the provision of informational material in alternative format, for qualified individuals with disabilities. For special needs contact Samantha Ninnemann at 608-266-5209 or ninnesi@dhfs.state.wi.us.

3.14 NON-DISCRIMINATION AGAINST EMPLOYEES OR APPLICANTS FOR EMPLOYMENT.

In connection with the performance of work under this contract, the grant recipient agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, marital status, physical condition, arrest or conviction record, developmental disability as defined in s. 51.01 (5), sexual orientation or national origin.

This provision shall include, but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Except with respect to sexual orientation, the grant recipient further agrees to take affirmative action to ensure equal employment opportunities.

The grant recipient agrees to post in conspicuous places, available for employees and applicants for employment, notice to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.

IV. CLARIFICATION AND/OR REVISIONS TO SPECIFICATIONS AND REQUIREMENTS NOTICE OF INTENT TO APPLY

4.0 NOTICE OF INTENT (OPTIONAL)

Prospective proposers are requested, but not required, to submit a Notice of Intent to apply to the Division of Long Term Care. The Notice of Intent form should be returned to the Division by **May 8, 2008 C.D.T.** Submittal of the Notice of Intent does not commit an agency to submitting an application. Any supplemental written information related to this RFP developed by the Division will be provided only to those agencies who have filed a Notice of Intent, or to agencies who request such information. Notices should be mailed, e-mailed or hand delivered to:

Samantha Ninnemann
Division of Long Term Care
1 West Wilson Street, Room 951
Madison, WI 53703
608-266-5209
Or at ninnesl@dhfs.state.wi.us

4.1 CLARIFICATION AND/OR REVISIONS TO SPECIFICATIONS AND REQUIREMENTS

Any questions concerning this RFP should be addressed, either in writing, by telephone request, or electronically to:

Samantha Ninnemann
Division of Long Term Care
1 West Wilson Street, Room 951
Madison, WI 53703
608-266-5209
Or at ninnesl@dhfs.state.wi.us

COLLECT CALLS WILL NOT BE ACCEPTED

Proposers are expected to raise any questions, exceptions, or additions they have concerning the RFP at this point in the RFP process. If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should notify, immediately, the above named individual of such error and request modification or clarification.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all recipients of this initial RFP.

Each proposal shall stipulate that it is predicated upon the requirements, terms, and conditions of this RFP and any supplements or revisions thereof.

Any contact with State employees concerning this RFP are prohibited, except as authorized by the RFP manager during the period from date of release of the RFP until the notice of intent to contract is released.

Questions and Answers Document:

Initial questions must be submitted electronically to Samantha Ninnemann (address above) by May 13, 2008. A question and answer document containing all questions submitted will be posted at <http://dhfs.wisconsin.gov/rfp/#DDES> by May 23, 2008. Further questions must be submitted to Samantha Ninnemann (address above). Updates to the question and answer document will be posted on the website periodically until May 30, 2007.

Proposers Conference Call:

A conference call will be held on **May 16, 2008 at 2:00 p.m.** Questions and concerns regarding the RFP will be addressed at that time. **Call in information will be provided only to those proposers that submit a notice of intent to apply or to agencies who request such information.**

V. SUBMITTAL OF APPLICATION

- 5.0** All applications must be typed, doubled-spaced, in 12-point Times New Roman font and should not exceed 10 pages plus appendices.
- 5.1** Proposers may compete for funding in more than one region and may submit more than one proposal in a region. However, proposers submitting multiple applications must clearly demonstrate the capacity to concurrently meet the requirements of all proposed activities in all submitted applications
- 5.2** Number of copies. The proposer must submit seven (7) copies of the application to the Division. Proposers must also submit all documents electronically on a PC-compatible disk.
- 5.3** **Closing date.** The closing date for the receipt of all applications under this solicitation will be **May 30, 2008.** Applications may be mailed or hand delivered. An application will be accepted and considered received on time if:

- A. The application is received by the mail room (address shown below) by (4:30 p.m. C.T. on **May 30, 2008**

Samantha Ninnemann
Division of Long Term Care
1 West Wilson Street, Room 951
Madison, WI 53703

- B. The application is hand delivered to the Division of Long Term Care (address shown below) by 4:30 p.m. C.T. on **May 30, 2008**

Samantha Ninnemann
Division of Long Term Care
1 West Wilson Street, Room 951
Madison, WI 53703

NO FAXED OR E-MAILED PROPOSALS WILL BE ACCEPTED.

Proposers are cautioned to allow sufficient time for delivery by the U.S. Post Office, because it can sometimes take several days to receive mail from outlying areas. Respondents/Applicants are cautioned that receipt of the (RFB/RFP) by the United State's Postal Service, the State of Wisconsin mail system or a commercial courier does not constitute receipt of a RFP by the Division of Long Term Care for the purposes of this RFP. All responses to this solicitation which are received after the closing date and/or time will not be reviewed and will be returned to the respondent/applicant. **No exceptions will be allowed.**

- c. Supplemental and clarifying information. Unless requested by the Division, no additional information will be accepted from a proposer after the deadline for submittal of applications.

VI. AWARDING FUNDS INFORMATION

6.0 EVALUATION CRITERIA, POTENTIAL POINTS TO BE AWARDED AND PROCEDURES

All applications received will be reviewed by an evaluation committee and ranked accordingly. The evaluation committee will evaluate all proposals against stated criteria. To be considered for an award, an application must score at least 98 points, or 70% of the total points available in the evaluation process, unless the evaluation committee determines it is in the best interest of the state to make an award to a proposer who scores less than 98 points. Applications will be reviewed and evaluated according to the following criteria.

MAXIMUM POINTS

30 PROJECT GOAL

The proposer has fully described:

- the overall goal of the project and the goal is consistent with the Pathways strategic priorities and key components listed in the RFP. (20 points)
- the goal addresses one or more of the applicable Regional issue areas. (10 points)

30 PROJECT OUTCOMES AND ACTIVITIES

The proposer has fully described:

- what the project will accomplish
- how each outcome will be accomplished
- how the project outcomes will be sustained into the future.

The proposer has shown:

- a clear connection between the activities and outcomes in the action plan
- how the action plan will support the integrated employment of people with disabilities.

20 MEASURE OF SUCCESS

The proposer has fully described:

- the method that will be used to determine if the project has been successful
- the measures of success and how they are tied directly to outcomes and activities

- measures of success are deliverable by December 31, 2008

20 GRANT COORDINATION AND COLLABORATION

The proposer has fully described:

- how the efforts of the grant will be coordinated
- who the grant partners will be
- how partners will be involved

20 DELIVERABLES OF THE PROJECT

The proposer has fully described:

- the products or materials that the project will create
- how these materials will be replicable by others
- all products and deliverables must be completed by December 31, 2008.

10 WORKPLAN

The proposer used the template provided. The work plan included in the proposal:

- is related to the project goals
- will facilitate the proposer accomplishing what has been proposed, given the timeframes, staffing patterns and budget included within their application
- shows activities, deliverables and outcomes that are sequentially reasonable.

The work plan must detail all tasks, activities and procedures in a logical progression that will be used to achieve the proposer's objectives.

The work plan must include the assignment of responsibility to specific personnel; the timetable for each task or activity to be started and to be completed; and must state who will be responsible for providing supervision to ensure tasks/activities are completed.

The work plan must include appropriate timeframes for all tasks and activities to ensure that sufficient effort is planned. If the proposal includes an increase in staffing, the methods described will assure that services are expanded or enhanced by the addition of staff, staff hours, staff wages or additional volunteers.

10 BUDGET/BUDGET NARRATIVE

The proposer used the budget and budget narrative templates provided. The budget is consistent with proposal. The budget narrative fully describes the method used in calculating the dollar amounts.

6.1 PROPOSER RESPONSES

Proposals submitted in reply to this RFP shall respond to the specifications stated herein. Failure to respond to the specifications may be a basis for an application being eliminated from consideration during the selection process.

In the event of an award, the contents of this RFP(including all attachments), RFP addenda and revision and the proposal from the successful proposer(s) will become contractual obligations. The Division reserves the right to negotiate the award amount, the programmatic goals, and the budget items with the selected proposer(s) prior to entering into an agreement.

Justifiable modification may be made in the course of the agreement only through prior consultation with and written approval of the Division . Failure of the successful proposer to accept these obligations may result in cancellation of the award.

6.2 WITHDRAWAL OF APPLICATIONS

Proposals may be withdrawn by written notice. Proposals may be withdrawn in person by the proposer or his/her authorized representative, providing his/her identity is made known and he/she signs a receipt for the proposal.

6.3 AWARD PROCEDURES

The Evaluation Committee's scoring will be tabulated and proposers will be ranked according to the numerical score received. The evaluation committee has the option to conduct interviews and/or on-site inspections of the top ranked proposers to include those results in the consideration of the evaluation points. The Division Administrator will make a final decision if a contract will be awarded. The Division reserves the right to reject any or all proposals and to negotiate the award amount, authorized budget items, and specific programmatic goals with the selected proposer(s) prior to entering into an agreement.

6.4 NOTICE OF INTENT TO AWARD A CONTRACT

Each proposer whose proposal is reviewed by the Evaluation Committee shall receive written notice of the determination of approval or non-funding of the proposed project.

After notification of awards are made, and under the supervision of Division staff, copies of all proposals will be available for public inspection from **8:30 a.m. to 4:30 p.m. on June 20, 2008 through July 7, 2008.**

**Division of Long Term Care
1 West Wilson Street, Room 951
Madison, WI 53703**

Each proposer whose project has not been approved shall be given an opportunity to discuss with the Division representative the reasons for non-funding or may write the Division representative requesting the reason for the decision.

Upon request, the Division representative will clarify non-funding reasons verbally or will respond in writing explaining the reasons for the project not being funded.

6.5 PUBLIC INFORMATION

It is the intention of the state to maintain an open and public process in the submission, review and approval of awards. All material submitted by proposers will be made available for public inspection after notice of intent to award or not to award a contract based on the evaluation(s) of the application which were submitted. This information will be available for public inspection,

under supervision, during the hours of **8:30 a.m. to 4:30 p.m., Monday through Friday (except holidays) until August 29, 2008**, in the Office of Independence and Employment, 1 West Wilson Street, Room 951, Madison, WI. No entire proposal submitted to the state may be marked as confidential, and any materials so marked, by being included in the application, will be considered public information.

Evaluation tabulation and scoring by individual evaluators will also be open for public inspection, but these scores will not identify individual evaluators.

6.6 PROTEST/APEAL PROCESS

Proposers can only protest or appeal violation of procedures outlined in this RFP. Ranking and scoring by the Evaluation Committee are not subject to protest or appeal. Notice of intent to protest and protests must be made in writing. Protestors should make their protests as specific as possible and should fully identify the procedural issue being contested.

The written notice of intent to protest must be filed with the:

**Administrator of Division of Long Term Care
1 West Wilson Street
P.O. Box 7850
Room 850
Madison, WI 53707**

and received in that office no later than the close of business on **June 27, 2008** or within five (5) working days after the notice of intent to award is postmarked, whichever is later. The written protest, fully identifying the procedural issue being contested, must be received in the Administrator's Office no later than ten (10) working days after the notice of intent to award is issued.

The decision of the Division of Long Term Care may be appealed to the Secretary of the Department of Health and Family Services, One West Wilson Street, Room 650, Post Office Box 7850, Madison, Wisconsin 53707 within five (5) working days of issuance, with a copy of the protest filed with the Administrator of the Division of Long Term Care.

PART II
TECHNICAL SPECIFICATIONS

Proposers are cautioned that in completing the following Technical Specifications they are to provide as complete information as possible. The only information evaluators will be given about a project is that which is contained within the proposal. For that reason, each copy must be a duplicate of the entire original, including any attachments.

The focus of the funding is to decrease barriers to and increase opportunities for person-centered, integrated employment in order to support people with disabilities in achieving their desired employment outcomes.

In order to determine the potential for a proposed project to achieve this aim, applications must fully address the program requirements and specifications which follow.

Proposals must include the following items submitted in the order listed.

- I. Outline and Table of Contents
- II. Application Summary
- III. Abstract
- IV. Narrative
 - A. Project Goal
 - B. Project Outcomes and Activities
 - C. Measures of Success
 - D. Grant Coordination and Collaboration
 - E. Project Deliverables
 - F. Workplan
- V. Budget
- VI. Letters of support (OPTIONAL, as Appendix, not included in 10 page limit)

A. APPLICATION SUMMARY (Section II above)

Complete the Application Summary following the instructions below. The Application Summary should be the second page in your proposal.

Section I. Agency Information

- Item 0 Enter the Project Category you wish your application to compete in
- Item 1 Enter the Project Title
- Item 2 The "Applicant Agency" is defined as the legal entity which assumes the liability for the administration of the grant funds and is responsible to DHFS for the performance of the project activities.
- Item 3 Enter name, address, and telephone number of project director.
- Item 4 Enter name, address, and telephone number of project fiscal agent. The fiscal agent is the individual who is responsible for the receipt and administration of the project funds and for the submission of all fiscal reports to DHFS.

- Item 5 Enter the Internal Revenue Services number assigned to the agency which is responsible for the employees hired under these project funds.

- Item 6 Enter the Pathways Region and indicate the city(ies), tribe(s) county(ies) or region(s) to be served by this project.

- Item 7 Check the box applicable to the "Applicant Agency" entered under Item 2.

- Item 8 If all or parts of the project will be subcontracted, fill in the name and address of the subcontractor.

- Item 9 Identify proposed sites (city and county). Specific addresses are unnecessary.

- Item 10 Enter the proposed dates for the project.

Section II - Budget Summary

The budget summary contains the total projected costs by cost category. All figures on this form should be rounded to the nearest dollar.

- Item 11 Enter line-item totals from the Detailed Budget Request.

- Item 12 Enter total project cost for the entire period of the project.

- Item 13 Enter the name, title, telephone number and signature of official authorized to commit applicant organization to this agreement.

APPLICATION FOR PATHWAYS TO INDPENDENCE REGIONAL GRANTS

Agency Name:_____

Proposal Title:_____

Project Category:_____

Proposers are required to number all pages and to organize their application according to the following format. This form serves as a checklist of application contents and facilitates application evaluation. This form must be completed and attached to the front of the finished application.

I	<u>Outline and Table of Contents</u>	Page 1
II	<u>Application Summary</u>	Page 2
III	<u>Abstract</u>	Page 3
iv	<u>Narrative</u>	
	A. Project Goal	
	B. Project Outcomes and Activities	
	C. Measures of Success	
	D. Grant Coordination and Collaboration	
	E. Project Deliverables	
	F. Workplan	
V	<u>Budget</u>	
VI.	<u>Letters of support</u> (OPTIONAL, as appendix, not included in 10 page limit)	

II. APPLICATION SUMMARY

Section A - AGENCY INFORMATION

0. Project Category:	1. Project Title		
2. Applicant Agency		Telephone	
Street Address	City	State	Zip
3. Project Director		Telephone	
Street Address	City	State	Zip
4. Fiscal Agent		Telephone	
Street Address	City	State	Zip
5. Employer Identification No.			
6. Area to be served: (a) (Division) Region (b) Area Agency on Aging (c) Counties or tribes served by this project:		7. Type of Agency (check one) <input type="checkbox"/> State Agency <input type="checkbox"/> Unit of Local Government (specify) _____ <input type="checkbox"/> Private, Non-Profit Agency <input type="checkbox"/> Proprietary <input type="checkbox"/> Tribal Reservation <input type="checkbox"/> Other (specify) _____	
8. If project will be subcontracted, fill in name and address of sub-contractor.			
9. If activities are to be conducted at a site other than the Applicant Agency, indicate this in the following space. Performance Site(s):			
10. Dates of Proposed Project Period		FROM	THROUGH

SECTION B - BUDGET SUMMARY

<u>Budget</u>	<u>Year 1</u> July 01, 2008 through December 31, 2008
1. Salaries	_____
2. Fringe	_____
3. Agency Personal Liability Insurance	_____
4. Travel	_____
5. Equipment	_____
6. Supplies and Operating Expenses	_____
7. Contractual and Consultant Costs	_____
8. Training	_____
9. Advertising	_____
10. Other	_____
12. TOTALS	_____

13. NAME, TITLE AND TELEPHONE NUMBER OF OFFICIAL AUTHORIZED TO COMMIT APPLICANT ORGANIZATION TO THIS AGREEMENT	
Typed Name of Official	
Telephone Number	Title
Signature	Date

III ABSTRACT

The abstract must be one page only. The information in the abstract should provide a brief description of your new or expanded project, highlighting the main points from the Detailed Budget Request and Narrative Sections of your proposal. Clearly state which project category you are competing in.

Proposals from existing programs must provide documentation that they are clearly expanding the scope of their current program.

IV NARRATIVE

Section A. Project Goal (30 pts)

Describe the overall goal of the project and how it is consistent with one or more of the Pathways Strategic Priorities and Key Components. If applicable, describe how the project goal addresses one or more of the applicable Regional issue areas. (Appendix 1)

Section B. Project Outcomes and Activities (30 pts)

Describe what the project will accomplish and how it will be achieved. Describe the plan to sustain the project into the future after the funding ends. Demonstrate a clear connection between the project's workplan and how it will support the integrated employment of people with disabilities.

Section C. Measure of Success (20 pts)

Describe the method that will be used to determine if the project has been successful. Demonstrate that the measures of success are tied directly to outcomes and activities. Measures of success must be completed by December 31, 2008.

Section D. Grant Coordination and Collaboration (20 pts)

Describe how the efforts of the grant will be coordinated, who the grant partners will be and how those partners will be involved. Letters of support may be included as appendices.

Section E. Deliverables of the Project (20 pts)

Describe the products or materials that will be created by this project. Describe how will these materials could be used or replicated by others. Project deliverables must be completed by December 31, 2008.

Section F. Workplan (10 pts)

Please use the workplan template and instructions provided (Appendix 2).

The workplan must detail all tasks, activities and procedures in a logical progression that will be used to achieve the project's objectives.

The work plan must include the assignment of responsibility to specific personnel; the timetable for each task or activity to be started and to be completed; and must state who will be responsible for providing supervision to ensure tasks/activities are completed.

Timeframes for all tasks and activities in the work plan must be appropriate to ensure that sufficient effort is planned. The methods described must assure that services are expanded or enhanced by the addition of staff, staff hours, staff wages or additional volunteers.

V. BUDGET (10 pts)

A detailed budget request should be submitted as part of your 10-page proposal. Please use template provided (Appendix 3).

VI. LETTERS OF SUPPORT (OPTIONAL)

Letters of support may be submitted as appendix to the proposal. Letters of support will not count toward the 10 page limit.

Appendix 1: Regional Issue Areas

Pathways Region and Counties	Issue Areas
Northern: Ashland, Bayfield, Forest, Iron, Oneida, Price, Sawyer, Vilas	<ul style="list-style-type: none"> ▪ Transportation for employment ▪ Employer network development ▪ Collaboration to maximize resources ▪ Education on self- and family-advocacy regarding employment ▪ Transition from high school to employment and community life
North Central: Clark, Langlade, Lincoln, Marathon, Portage, Taylor, Waupaca, Wood	<ul style="list-style-type: none"> ▪ Transition from high school to employment ▪ Integrated employment options for out of school youth ▪ Integrated employment options for long term care ineligible individuals who require on-going or intermittent support beyond DVR ▪ Employment-focused outreach for people with disabilities in the Hmong Community
Northeastern: Brown, Calumet, Door, Florence, Fond du Lac, Kewaunee, Manitowoc, Marinette, Menominee, Oconto, Outagamie, Shawano, Sheboygan, Winnebago	<ul style="list-style-type: none"> ▪ Transition issues such as vocational exploration, work experience, job training, and post-secondary education. ▪ Strategies to increase recruitment and hiring of people with disabilities, including public awareness and inter-agency collaboration.
Northwestern: Barron, Burnett, Chippewa, Douglas, Dunn, Eau Claire, Pierce, Polk, Rusk, St. Croix, Washburn	<ul style="list-style-type: none"> ▪ Access to employment-related assistive technology ▪ Seamless services for transitioning youth from school to employment ▪ Engage employers in process of hiring people with disabilities
South Central: Adams, Columbia, Dane, Dodge, Green, Green Lake, Jefferson, Marquette, Rock, Sauk, Waushara	<ul style="list-style-type: none"> ▪ Create local collaborative models for increase in integrated employment ▪ School-Work partnerships to increase employment opportunities for youth ▪ Education on disability benefits and impact of employment on benefits
Southeastern: Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, Waukesha	<ul style="list-style-type: none"> ▪ Promote best practices for hiring and retaining employees with disabilities ▪ Outreach and support to employers ▪ Develop strategies to address regional workforce needs through the hiring of people with disabilities ▪ Strengthen linkages between public and private post-secondary institutions and employers
Southwestern: Buffalo, Crawford, Grant, Iowa, Jackson, Juneau, La Crosse, Lafayette, Monroe, Pepin, Richland, Trempealeau, Vernon	<ul style="list-style-type: none"> ▪ On-demand transportation for employment ▪ Supports for employers regarding recruitment, retention and accommodations of people with disabilities ▪ Customized employment

Appendix 2: Project workplan

Project Name:		Agency:		Contact:	
Pathways strategic priority and regional goal addressed:					
Rationale for project:					
Detailed activities	Outputs/ deliverables	Deadline	Expected outcomes	Resources	
▪	▪	▪	▪	▪	

Workplan instructions:

Agency: Identify the lead agency for the project.

Contact: Identify the project leader and provide contact information.

Pathways strategic priority and regional goal addressed: Identify which of the six priorities and regional goals will be addressed by this project

Rationale for project: Briefly explain how this project will align with the Pathways strategic plan and address the identified strategic priority and goal.

Activities: Step-by-step description of project activities.

Outputs/ deliverables: Details of work products resulting from each activity

Deadline: Dates when each of the deliverables will be completed

Expected outcomes: Description of what each step will accomplish in terms of a change in knowledge, skills, attitudes, values, behavior, condition, or status of a target population.

Resources: Bullets indicating partners, sub-contractors (if applicable), and total requested project budget amount

Appendix 3: Detailed budget request

DETAILED BUDGET REQUEST-

(Enter name of project here)

1. Personnel

Title of Position	% of time	Hr. rate	Hrs. per month	# months budgeted	Total cost
		\$			\$
		\$			\$
		\$			\$
		\$			\$
		\$			\$

Total Salary \$ _____

- 2. Fringe Benefits for Project Personnel (Employers FICA: Employees Insurance) (_____ %) \$ _____
- 3. Agency Personal Liability Insurance
 - a. Professional Staff \$ _____
- 4. Travel
 - a. Professional Staff \$ _____
 - b. Volunteer Workers \$ _____
- 5. Equipment (attach separate sheet detailing) \$ _____
- 6. Supplies and Operating Expenses (attach a separate sheet detailing) \$ _____
- 7. Contractual and Consultant Costs (attach a separate sheet detailing) \$ _____
- 8. Training for Paid and Volunteer Workers: \$ _____
- 9. Advertising \$ _____
- 10. Other Expenses (attach a separate sheet detailing) \$ _____
- 11. TOTALS (lines 1 through 10) \$ _____

NOTE: BUDGET DETAIL IS TO BE PROVIDED IN THE BUDGET JUSTIFICATION FOR (4) TRAVEL, (5) EQUIPMENT, (6) SUPPLIES, ETC., (7) CONTRACTUAL AND CONSULTANT COSTS, AND (10) OTHER EXPENSES.