

# Request for Proposals and Program Guidelines

## Innovations Program

Innovations in Person-Centered, Trauma-Informed Supportive Services for Holocaust Survivors,  
Older Adults with a History of Trauma, and Their Family Caregivers

March 24, 2026

This work is supported by the Administration for Community Living (ACL), the United States Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$8,389,500 with 75% funded by ACL/HHS and \$2,796,500 and 25% funded by non-government source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the United States Government. For more information, please contact [Aging@JewishFederations.org](mailto:Aging@JewishFederations.org).



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# 1. Grant Overview

## 1.1 Background

### 1.1.1 Federal Grant Program

In 2025, Jewish Federations of North America (**Jewish Federations**) received a three-year grant, pending Congressional appropriations, from the U.S. Department of Health and Human Services, Administration for Community Living/Administration on Aging (ACL), called *Expanding the National Capacity for Person-Centered, Trauma-Informed Care: Services and Supports for Holocaust Survivors and Other Older Adults with a History of Trauma and Their Family Caregivers*.

The grant mission is to expand the nation's capacity to provide **person-centered, trauma-informed (PCTI)** services for the following **Service Populations**: Holocaust survivors, older adults with a history of trauma, and their family caregivers. The PCTI approach is a holistic model of care that promotes the health and well-being of individuals by accounting for the role of trauma across the life course, resisting retraumatization, and promoting the strength, agency, and dignity of people receiving care. The PCTI approach can be used to help individuals on an interpersonal, organizational, societal, and public policy level. The mission of the ACL grant is achieved by funding and supporting subgrantees to develop, test, and scale community-based PCTI programs for the Service Populations and increase the knowledge and skills of aging service providers to implement PCTI care.

This grant was awarded to Jewish Federations after two successful previous grants. Jewish Federations' first five-year grant from ACL was awarded in 2015 to advance PCTI supportive services for Holocaust survivors and their family caregivers. In 2020, Jewish Federations was awarded a second five-year grant to apply the lessons learned from the previous grant to expand PCTI support for Holocaust survivors, other older adults with a history of trauma, and their family caregivers. Jewish Federations is the **grantee** of the federal government. Organizations that receive grants from Jewish Federations are **subgrantees**.

### 1.1.2 Innovations Program

The ACL grant is implemented by the Jewish Federations' Center on Aging, Trauma, and Holocaust Survivor Care (**Center**), in part, through the Innovations Program. This program uses grant and philanthropic funds to award subgrants to develop innovations in PCTI care.

Subgrantees of the Innovations Program serve Service Populations through the PCTI approach, train their staff in the PCTI approach, earn recognition as leaders in aging services and trauma-informed care, share promising practices on implementing the PCTI approach on a national level, and develop partnerships with peer organizations.

## 1.2 Innovations Program Request for Proposals

**Jewish Federations seeks applications from organizations across the United States to develop innovative PCTI projects for Holocaust survivors, older adults with a history of trauma, and their family caregivers.** Successful applicants for this request for proposal (RFP) will comprise the “Innovations Program - Heather Cohort” and will join prior cohorts as leaders in the PCTI approach. The RFP process is competitive. Only completed applications submitted by **Friday, May 15, 2026**, will be considered.

### 1.2.1 Innovation Requirement

#### Innovative

For this RFP, **innovation** is defined as the introduction of a new and/or expanded idea, method, product, or service to meet unmet community needs. Proposals can be innovative for the field, organization, or program. What is innovative for one organization might not be innovative for another. Below is a list of examples that could make a proposal innovative:

- Serves a community need or problem in a new, expanded, and/or different way
- Implements a new and/or expanded service delivery method
- Utilizes volunteers in a new, expanded, and/or different way

#### Not Innovative

Below is a list of examples that are not considered innovative:

- Increasing participant numbers without implementing a new or expanded concept
- Continuing an existing project without any new enhancement

If an organization has implemented a project similar to the proposed project, whether or not the project was funded by Jewish Federations, applicants must detail what will be new, innovative, and/or expanded.

### 1.3 Person-Centered, Trauma-Informed (PCTI) Approach Requirement

All projects supported by this grant are required to incorporate PCTI principles and expand PCTI services. Organizations are encouraged to infuse the PCTI approach into other aspects of organizational operations. This aids in sustaining grant-funded projects, encouraging a PCTI workplace and culture, and promoting organizational support for the PCTI framework.

To support the integration of the PCTI approach into grant projects and organizational operations, applicants are encouraged to review the resources freely available on the Center's website: <http://www.agingandtrauma.org/>. The Center's website hosts a library of resources on the PCTI approach, including webinars, publications, trainings, guides, and factsheets on aging, trauma, and the PCTI approach. Of primary importance, here is the backgrounder on the PCTI approach: [https://cdn.fedweb.org/fed-42/2/PCTI\\_Backgrounder\\_-\\_Updated\\_Feb.\\_2026.pdf](https://cdn.fedweb.org/fed-42/2/PCTI_Backgrounder_-_Updated_Feb._2026.pdf).

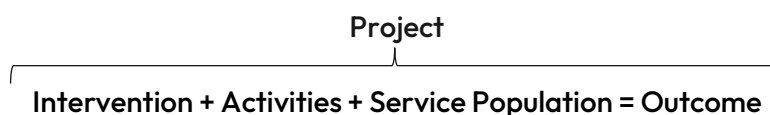
In addition to reviewing Center resources, applicants can reference the Substance Abuse and Mental Health Administration's Concept of Trauma and Guidance for a Trauma-Informed Approach: [https://cdn.fedweb.org/fed-42/2/SAMHSA\\_Concept\\_of\\_Trauma\\_and\\_Guidance\\_for\\_a\\_Trauma\\_Informed\\_Approach.pdf](https://cdn.fedweb.org/fed-42/2/SAMHSA_Concept_of_Trauma_and_Guidance_for_a_Trauma_Informed_Approach.pdf).

To ensure a fair and transparent application process, Jewish Federations is unable to coach or advise applicants with proposal topics.

### 1.4 Project Requirements

Applicants must propose at least one project and may propose up to two projects. Proposals must describe in detail each project and submit a corresponding budget. The number of proposed projects will not influence the proposal score.

A **project** is composed of one intervention, which is supported by multiple activities, in service of at least one Service Population, and results in one main outcome.



An **intervention** is a method or process to prevent harm or improve functioning. There can be only one intervention per project (e.g., socialization events, chair yoga, individual therapy, pastoral counseling, case management). Every intervention in the Innovations Program must be PCTI.

While there is one intervention per project, the intervention can take different formats. For example, group therapy intervention could include morning, afternoon, and weekend sessions. A socialization intervention could include discussion groups on current events, music appreciation, and art history. In these two examples, there are different methods of implementing the intervention, but they are still considered one intervention.

An **activity** is a task implemented to support the effectiveness of the intervention. There should be multiple activities within one project.

All activities listed for a project should support the project's intervention. For example, a chair yoga project could entail the following activities: conducting outreach to participants, training staff in PCTI care, providing chair yoga sessions, conducting an evaluation of project outcomes, and grant administration tasks. A project should not include activities that do not relate directly to the intervention.

The **Service Population** is the intended project participants. At least one Service Population must be served per project, but projects can serve multiple Service Populations (e.g., Holocaust survivors, older adults with a history of trauma, and/or family caregivers).

For example, a project may conduct cooking classes as an intervention while serving various populations of older adults. One class may be delivered in Russian for Holocaust survivors from the Former Soviet Union, while another is offered in English for Holocaust survivors from multiple backgrounds. The curriculum may incorporate different recipes and examples to ensure cultural relevance for each group. Since the intervention is the same, this would be considered one project serving multiple Service Populations.

An **outcome** is a result of a project on participants (e.g., improved mental health among family caregivers, or reduced social isolation among Holocaust survivors). Jewish Federations evaluates every project in the Innovations Program to determine how the proposed intervention achieves the suggested outcome. While projects may achieve many outcomes, for the purpose of the Center's evaluation, each project should have only one primary outcome. Applicants must select one primary outcome for each proposed project from the list of outcome categories below:

- Improved physical health,
- Improved mental health,
- Improved social health,
- Improved spiritual health,

- Improved access to home and community-based resources,
- Improved financial health,
- Improved family caregiving experience, or
- Improved understanding of the PCTI approach

For more information about how a project is defined and for examples of project descriptions, please view the How to Define a Project document and video tutorial located on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

### **Additional Guidance on PCTI Training Projects**

Projects to train Supporters of Service Populations in how to implement the PCTI approach can only be funded if the training covers information not already included in Jewish Federations' online course, *Person-Centered, Trauma-Informed Essentials for Aging Services*: [https://holocaustsurvivorcare.jewishfederations.org/pcti\\_training](https://holocaustsurvivorcare.jewishfederations.org/pcti_training). For example, if a training is created for a particular Supporter of Service Populations, like pharmacists or occupational therapists, or to support a specific Service Population not included in the online course, like older adults in high-risk professions, it may be allowable. Jewish Federations will not fund a general training on the fundamentals of PCTI care. Instead, the Center encourages the use of trainings and materials already available through the Center.

Training projects must go beyond resource sharing or basic knowledge acquisition and must occur over an extended period of time. For example, an appropriate training project proposal may include monthly, in-person training sessions for home health aide staff and may include activities in the proposal such as curriculum development, virtual training, and in-person group training sessions.

Nothing in this section prohibits the training of Supporters of Service Populations in order to implement a direct service project. On the contrary, training and knowledge acquisition is likely necessary and beneficial in a direct service project. For example, project staff providing case management should participate in PCTI training, and this should be included as an activity in the Work Plan.

## 1.5 Project Outcome Categories

Project outcomes must adhere to one of the eight categories defined below. The services and measurable results listed are examples, not an exhaustive list.

1. **Improved Physical Health.** Services designed to promote physical health by promoting positive health behaviors and supporting the maintenance or improvement of physical and cognitive health conditions. Services may include cognitive health management or dementia care, health and wellness programs, nutritious meals, falls prevention and home modifications, homecare, chronic disease self-management, medication management, pain management, and health education. Measurable results may include improved overall health, improved health literacy, increased understanding of self-care strategies, improved or maintained cognitive function, improved nutritional intake, greater confidence and motivation to maintain physical health, reduced falls, and reduced institutionalization.
2. **Improved Mental Health.** Services designed to promote mental health and emotional well-being by encouraging positive mental health behaviors and supporting stable or improved mental health conditions. Services may include individual and group counseling, support groups, creative arts projects, and psychoeducation. Measurable results may include increased coping-skill acquisition, intention, and use; improved access to emotional support; greater confidence and motivation to maintain or improve mental health; decreased depression and/or anxiety; and reduced stigma around mental health access and use.
3. **Improved Social Health.** Services designed to promote social connectedness by increasing engagement with family, friends, and community. Services may be virtual, in-person, or hybrid and may include social gatherings, technology training, educational programs, field trips, discussion groups, and friendly caller and/or visitor programs. Measurable results may include increased feelings of social support, greater interest in social activities, increased community engagement, improved feelings of connection, and reduced feelings of social isolation and loneliness.
4. **Improved Spiritual Health.** Services designed to promote a sense of meaning, purpose, and life satisfaction by fostering self-acceptance, resilience, hope, confidence, belonging, and connection to the self and/or cultural traditions. Services may include intergenerational programming, creative legacy storytelling, pastoral counseling, sharing information about cultures or faiths, and community gatherings to mark holidays and life-cycle events. Measurable results may include increased life satisfaction,

improved outlook on life, improved self-perception, improved feelings of resilience and adaptability, and deeper engagement with cultural identity.

5. **Improved Access to Home and Community-Based Resources.** Services designed to promote identification, access, and use of home and community-based resources. Service may include social services, case management, transportation, legal assistance, benefits counseling and eligibility assistance, and participation in community service or events. Measurable results may include increased identifying, understanding, and utilization of social and legal services and resources; improved access to home and community-based services; improved ability to guide others in utilizing social services; improved technology access and technological proficiency; successful acquisition of benefits; and reduced stigma associated with accessing resources.
6. **Improved Financial Health.** Services designed to promote financial health and well-being by strengthening financial literacy, decision-making, and long-term stability. Services may include financial training and planning, employment training, budgeting support, and scam or financial abuse prevention or detection. Measurable results may include improved feelings of financial stability, confidence in making financial decisions, enhanced awareness of financial assistance resources, improved capacity to meet essential expenses, and reduced stress and anxiety associated with financial concerns.
7. **Improved Family Caregiving Experiences.** Services designed to promote physical, mental, spiritual, financial, and social health and well-being of family members and friends who care for Holocaust survivors and/or older adults with a history or trauma. Services may include caregiver outreach, assessment, counseling and support groups, information and referral, case management, respite services, caregiving resources, and training. Measurable results may include improved satisfaction with caregiving; increased connection to other family caregivers; increased access to resources to support caregiving; increased understanding of self-care strategies; enhanced caregiving skills and confidence; reduced physical, mental, or economic strain; and reduced feelings of burnout, stress, and isolation associated with caregiving.
8. **Improved Understanding of the PCTI Approach.** Training designed to provide an understanding of the PCTI approach, its relevance to aging services, and how it can be used by family caregivers, aging services professionals, and volunteers. Training may be virtual, in-person, or hybrid; consist of multiple sessions over weeks, months, or years; specialized for a specific demographic of Supporters of Service Populations or Service Populations, and may include developed instructional content, workshops, live sessions, and/or facilitated discussions, resources, and job aids. Measurable results may include increased number of individuals trained in the PCTI approach, increased awareness of

the PCTI approach, and increased understanding of how trauma impacts health, aging, family caregiving, service provision, and the PCTI approach.

## 1.6 Eligible Service Populations

Applicants may propose projects to support three eligible **Service Populations** including Holocaust survivors, older adults with a history of trauma, and family caregivers. These Service Populations are defined below.

1. **Holocaust Survivor.** According to the [US Holocaust Memorial Museum](#), “Holocaust survivors are Jews who experienced the persecution and survived the mass murder that was carried out by the Nazis and their collaborators between 1933 and 1945. This includes those who were in concentration camps, killing centers, ghettos, and prisons, as well as refugees or those in hiding. Holocaust survivors also include people who did not self-identify as Jewish but were categorized as such by the perpetrators,” (Who is a Survivor? Section, para. 1). “Roma and Sinti, Poles and other Slavic peoples, Soviet prisoners of war, persons with disabilities, political prisoners, trade union leaders, ‘subversive’ artists, those Catholic and Lutheran clergy who were seen as opponents of the regime, resisters, Jehovah’s Witnesses, male homosexuals, and criminal offenders, among others were also victims of Nazi persecution,” (Who is a Survivor? Section, para. 2). The definitions of Jewish Nazi victim used by the Claims Conference and the German Government are also acceptable definitions for Holocaust survivors under this grant, and there may be other definitions. The U.S. Government does not limit services under this grant to any of these definitions; however, individuals born after February 1946 are not considered Holocaust survivors under this grant.
2. **Older Adult with a History of Trauma.** As defined by the Older Americans Act, an older adult is a person who is *age 60 or over* (Colello & Napili, 2024). An individual with a history of trauma has been exposed to a traumatic event, series of events, or circumstance(s). This trauma exposure may be considered by the older adult as “physically or emotionally harmful or life threatening and that has lasting adverse effects on the individual’s functioning and mental, physical, social, emotional, or spiritual well-being,” (United States Substance Abuse and Mental Health Services Administration [SAMHSA], 2014, p. 7).
3. **Family Caregiver.** Within the scope of this grant, a family caregiver is defined as a family member, partner, or friend of an individual who assists an individual with a chronic or disabling health condition. Caregiving activities could include assistance with instrumental or routine activities of daily living (IADL or ADL), such as preparing meals,

bathing, dressing, toileting, cleaning, managing household chores, and more. This responsibility may be short-term, long-term, or indefinite. Although family caregivers may be compensated, they may not have prior experience in caregiving and are not professionally employed to care for their loved one. They may live with or separately from the individual they support. Either the family caregiver or the individual receiving care must (a) be at least 60 years of age and (b) have a history of trauma. The services funded by this grant must support the family caregiver's role as a caregiver.

Projects may also engage with – **but not provide direct services to – supporters of the Service Populations**, as defined below.

1. **Professional Service Provider.** An individual who is employed or contracted to provide professional services to a Holocaust survivor, older adult with a history or trauma, and/or family caregiver. This may include, but is not limited to, case managers, social workers, program managers and directors, healthcare professionals, legal professionals, or certified nursing assistants, who may be internal or external to the organization receiving grant funding.
2. **Volunteer.** An individual working in an unpaid position to provide services to a Holocaust survivor, older adult with a history or trauma, and/or family caregiver. This may include, but is not limited to, lay leaders, friendly visitors or callers, food runners, or respite care providers.

## 2. Grant Awards

### 2.1 Grant Eligibility

To be eligible to apply, an organization must meet all the following criteria:

1. The organizations must be based in the United States.
2. The organization must fall into one of the following organization types:
  - a. Domestic public or private non-profit entities;
  - b. State and local governments;
  - c. Indian tribal governments and organizations (American Indian/Alaskan Native/Hawaiian Native/Native American);
  - d. Faith-based organizations;

- e. Community-based organizations;
  - f. Hospitals; and/or
  - g. Institutions of higher education.
3. The organization must be a direct service provider to Holocaust survivors, older adults with a history of trauma, and/or family caregivers.
  4. The organization must have at least one audit report that includes a management letter, consolidated statements of activities, functional expenses, and cash flow.
  5. The organization must begin the process to obtain a Unique Entity ID (UEI) number by the time this application is submitted, and the organization must obtain the UEI number by the time funding is disbursed.
  6. The organization must submit an Intent to Apply to Jewish Federations by Wednesday, April 15, 2026.
  7. The organization must accept the terms and conditions of Jewish Federations' Cooperative Agreement, which can be viewed on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>. An organization's leadership must agree to adhere to all provisions without exception and sign the document "as is." Jewish Federations will not negotiate, amend, and/or modify the Cooperative Agreement for individual organizations in connection with a Subgrant award.

If an organization currently receiving Jewish Federations grant funds chooses to apply, the new application for the Innovations Program must be for a new project and/or expansion of an existing project.

An organization may not submit more than one application for the Innovations Program RFP; however, organizations can apply to the Innovations Program and other Jewish Federations-funded programs.

## 2.2 Grant Timeline

The Innovations Program is an 18-month grant, beginning on January 1, 2027 and ending on June 30, 2028. The duration of the grant is divided into two Program Periods, each consisting of nine months. Jewish Federations can only commit to fund subgrantees in Program Period 1 (January 1, 2027 - September 30, 2027). Pending Congressional appropriations, compliance with all program requirements, and the success of the subgrantee's projects, Jewish Federations intends to award the same funding amount in Program Period 2 (October 1, 2027 - June 30,

2028) as awarded in Program Period 1. Applicants should consider this an 18-month program and propose an 18-month budget.

## 2.3 Award Amount

Applicants must propose one of the funding levels below:

**Option A:** \$60,000 each Program Period for one or two projects, resulting in an 18-month total award of \$120,000, or

**Option B:** \$105,000 each Program Period for one or two projects, resulting in an 18-month total award of \$210,000.

Funding levels requested must be the same for both Program Periods. For example, an applicant may not request \$60,000 in Program Period 1 and \$105,000 in Program Period 2. Also, applicants may not unevenly distribute funding over the 18-months. For example, if an applicant requests \$120,000 for 18 months, they may not spend \$70,000 in Program Period 1 and \$50,000 in Program Period 2. Rather, the applicant must spend \$60,000 in each Program Period. However, if an applicant proposes two projects, the funding does not have to be equally divided between the two projects. For example, if an applicant requests \$60,000 per Program Period for two projects, \$20,000 may be spent on Project 1 and \$40,000 may be spent on Project 2. Jewish Federations will not consider applications that do not meet these funding level requirements or that request more than two projects.

Not all applications will receive funding, and those that do receive funding may not receive the full amount requested. The Review Committee and Jewish Federations will review proposed applications and budgets to ensure, “all budgeted line items are reasonable, necessary, and allocable,” and not inflated (2 CFR § 200.403-405).

## 2.4 Match Requirements

To complement Jewish Federations’ grant award, applicants will be required to contribute match funding at a level of 25% of the total program budget. Subgrantees will be responsible for raising the match funding in both Program Periods 1 and 2, if Program Period 2 funding is available. In Option A with a request for \$60,000 from Jewish Federations, \$20,000 match will be required in each Program Period, and the total 18-month match requirement will be \$40,000. In Option B with a request for \$105,000 from Jewish Federations, \$35,000 match will be required in each Program Period, and the total 18-month match requirement will be

\$70,000. Jewish Federations' grant funding plus the required match equals the total program budget per Program Period. The charts below detail the two available funding amounts, the corresponding amounts of match required from subgrantees, and the total program budgets.

| <b>Option A: Funding Request of \$60,000 Per Program Period</b> |                                                             |                                                             |                                                           |
|-----------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------|
|                                                                 | <b>Program Period 1:<br/>Jan 1, 2027 – Sep 30,<br/>2027</b> | <b>Program Period 2:<br/>Oct 1, 2027 – Jun 30,<br/>2028</b> | <b>18-Month Total:<br/>Jan 1, 2027 – Jun 30,<br/>2028</b> |
| <b>Jewish Federations<br/>Grant Funding</b>                     | \$60,000                                                    | \$60,000                                                    | \$120,000                                                 |
| <b>Match Requirement</b>                                        | \$20,000                                                    | \$20,000                                                    | \$40,000                                                  |
| <b>Total Program<br/>Budget</b>                                 | \$80,000                                                    | \$80,000                                                    | \$160,000                                                 |

| <b>Option B: Funding Request of \$105,000 Per Program Period</b> |                                                             |                                                             |                                                           |
|------------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------|
|                                                                  | <b>Program Period 1:<br/>Jan 1, 2027 – Sep 30,<br/>2027</b> | <b>Program Period 2:<br/>Oct 1, 2027 – Jun 30,<br/>2028</b> | <b>18-Month Total:<br/>Jan 1, 2027 – Jun 30,<br/>2028</b> |
| <b>Jewish Federations<br/>Grant Funding</b>                      | \$105,000                                                   | \$105,000                                                   | \$210,000                                                 |
| <b>Match Requirement</b>                                         | \$35,000                                                    | \$35,000                                                    | \$70,000                                                  |
| <b>Total Program<br/>Budget</b>                                  | \$140,000                                                   | \$140,000                                                   | \$280,000                                                 |

The match may be comprised of financial contributions (cash or grants), in-kind contributions (goods, services, or time), or both. Possible match sources can include, but are not limited to:

- Financial contributions, including support from state, county, or local governments; foundations; individual or corporate donors; Claims Conference; and KAVOD SHEF support to individual communities; or
- In-kind contributions, including staff, volunteer, and consultant time; donated goods; and program and office space.

The following sources **cannot** be used toward the Jewish Federations' match:

- Federal funds,

- Funds used to match other grants, and
- Funds received from Jewish Federations' Expanded Critical Supports Program, Expanded Critical Supports EFA Program, National Network Program, or Jewish Federations' contributions to KAVOD SHEF grants.

Applications must specify the anticipated sources of the match. Subgrantees must demonstrate to Jewish Federations receipt of all financial match funds and a detailed commitment plan for all in-kind contributions for Program Period 1 by June 30, 2027, and for Program Period 2 by December 31, 2027. If subgrantees cannot demonstrate the required minimum match for Program Period 1 by June 30, 2027, total funding for Program Period 1 and funding for Program Period 2 may not be issued.

Matching funds for this grant are subject to the same requirements as government funds awarded by Jewish Federations. The match must directly support the Jewish Federations-funded project(s). Funds can only be included as match if they are solely applied to the Jewish Federations-funded program, including but not limited to the same population served, same purpose of the Jewish Federation-funded project, same staff, and same activities. Match funding may not be used for other subgrantee programs, projects, or staff.

## 2.6 Funding Limitations

Jewish Federations' grant funds and match funds may not be used for the following activities:

1. **Fundraising.** This includes, but is not limited to, endowments, capital campaigns, fundraising, and fundraising professionals.
2. **Lobbying or Political Activities.**
3. **Construction or Rehabilitation of Buildings.**
4. **Equipment Purchases.** Funding may not be used for equipment purchases, unless such equipment is necessary to carry out an activity otherwise fundable under Title IV of the Older Americans Act. Office equipment, such as furniture or copy machines, is not allowable. Allowable purchases include, but are not limited to, emergency response systems or grab bars, provided that the purchases are directly related to the proposed project(s).
5. **Insurance.** This includes all general and liability insurance for the organization and the Subgrantee Activities.
6. **Automobile, Bus, or Other Transportation Insurance.**

7. **Automobile or Bus Repairs.** This includes repairs for vehicles owned by Service Populations, staff, external vendors, or the organization (except with respect to permissible emergency financial assistance under Jewish Federations' Expanded Critical Supports and National Network programs).
8. **Basic Research.** Funding may not be used to conduct basic research. Basic research is study and experimentation for the purpose of greater understanding of phenomena or observable facts without a direct services component (ex. scientific or medical experiments). Sometimes in the course of direct services, additional learning is necessary and would not be considered basic research. For example, conducting a needs assessment or learning a population's trauma history for the grant-funded project is not considered basic research. Additionally, it is not considered basic research to scientifically evaluate the impact of a project.
9. **Income Maintenance as defined under Applicable Laws.** Funding may not be used to make cash or cash equivalent payments to Service Populations.
10. **Grants to Individuals or Groups for Scholarships or Honorariums.**
11. Funding may not be used to cover copays, coinsurance, deductibles or any services reimbursed by any third-party insurance, including Medicare, Medicaid, other government-funded insurance, or any private insurance. Subgrantees may not bill public benefit programs, such as Medicaid, Medicare, other government-funded insurance, or private insurance for the balance of the cost of services (such as staff salaries or client expenses) provided by a Jewish Federations-funded project.
12. **Institutional Care.** Funding may not be used to cover costs associated with staying in a nursing home, residential care, or assisted living facility. However, subgrantees may provide innovative PCTI services in those facilities.
13. **Emergency Financial Assistance.** Providing emergency financial assistance is not allowable in the Innovations Program. (Under Jewish Federations' Expanded Critical Supports and National Network programs, Emergency Financial Assistance is permitted in the form of payments directly to vendors or service providers, or in the form of grocery store or gas gift cards with clear documentation of the purpose in an urgent situation. Cash or cash equivalents such as a check or general-purpose debit card may never be distributed to clients or staff for any reason.)
14. **Services to any person less than 60 years of age who is not a family caregiver caring for an individual 60 years or older.**
15. **Direct services, case management, or counseling to Supporters of Service Populations.**

16. **Meals for Supporters of Service Populations.** Limitations and exceptions on grant fund use for meals can be found here: [https://cdn.fedweb.org/fed-42/2/Food\\_Policy\\_Update\\_-\\_3.17.26\\_New.pdf](https://cdn.fedweb.org/fed-42/2/Food_Policy_Update_-_3.17.26_New.pdf)
17. **Training without Direct Services.** Funding may not be used to develop and/or implement PCTI training without a separate direct service project to at least one Service Population. Training Supporters of Service Populations on its own is not considered a direct service to the Service Population.
18. **Needs Assessment or Outreach without Direct Services.** Funding may not be used to support needs assessments or outreach without direct services as part of the project.
19. **Public Education without Direct Services.** Funding may not be used to support public education. For example, recording survivor testimony for the sole benefit of educating the community is prohibited, but the creation of a legacy project that benefits older adults with a history of trauma is allowable.
20. **Financial Double Dipping.** Funding may not be used to cover the exact same expenses, such as staff, consultants, event space, and/or programming covered by other grants from Jewish Federations or other sources.
21. **Non-Innovative Services.** Funding may not be used to continue existing projects without expansion, a new component, or innovations in PCTI care.
22. **Professional Development.** Funds may not be used to attend trainings, conferences, or professional development activities, except for Center-funded trainings, including the annual Training Workshop. However, subgrantees may request pre-approval to use grant funds for partial registration and travel to conferences if the participant is presenting on the PCTI project funded by Jewish Federations. Not all requests may be approved.
23. **Publication Fees.**
24. **Marketing Unrelated to Project.** This includes publication subsidies, marketing, and advertising costs for general organization operations.
25. **Human Resources.** Internal or external fees and expenses related to human resources.
26. **Audit Fees and Expenses.**
27. **Legal Fees and Expenses.** This does not prohibit costs related to permissible emergency financial assistance activities under Jewish Federations' Expanded Critical Supports and National Network programs.
28. **Professional Fees and Certifications.** This includes, but is not limited to legal, medical, accounting, and social work fees and certifications.

29. **Gym Memberships.** Gym, senior center, or other membership fees, unless part of a case management plan and the expenses have been pre-requested and pre-approved by Jewish Federations.
30. **General Office IT, Technology, and Software.** Cell phones and service plans related to the Jewish Federations-funded project must be pre-requested and pre-approved.
31. **Religious Instruction.** Funding may not be used to support religious instruction. Limitations on religious activities can be found in the Faith-Based Organizations Guidance: [https://cdn.fedweb.org/fed-42/2/Faith-Based Organizations Guidance Feb 2026.pdf](https://cdn.fedweb.org/fed-42/2/Faith-Based%20Organizations%20Guidance%20Feb%202026.pdf). Chaplaincy programs that abide by these guidelines are allowable.
32. **Materials to be Licensed or Sold.** Funding may not be used to produce materials or tools to be licensed or sold during the grant period. Refer to the Cooperative Agreement, which can be viewed on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>. For more information about requirements and limitations placed on materials developed through this grant.
33. **Fees for Services Rendered.** This includes, but is not limited to, fees to attend or participate in subgrantee activities, Jewish Federations PCTI programs, or PCTI services that may have been previously funded by another source but is now funded through the Jewish Federations grant.
34. **Development of Introductory Trainings.** Funding may not be used to develop PCTI training materials already covered in Jewish Federations' online course, *Person-Centered, Trauma-Informed Essentials for Aging Services*: [https://holocaustsurvivorcare.jewishfederations.org/pcti\\_training](https://holocaustsurvivorcare.jewishfederations.org/pcti_training).
35. **Alcohol or Alcohol-Related Activities.**
36. **Unapproved Budget Expenses.** Budget line-items not listed and approved by Jewish Federations in the Subgrantee final budget.
37. **Other activities and/or expenses that Jewish Federations may deem disallowable during the reasonable course of business.**

## 3. Requirements and Compliance

### 3.2 Cooperative Agreement

The Cooperative Agreement is the standard agreement that all subgrantees will be required to execute as a condition of award *without negotiation or modification*. The disbursement of any portion of the grant is subject to the condition that the Cooperative Agreement is executed by the subgrantee and Jewish Federations. Applicants are *strongly encouraged* to review the Cooperative Agreement and FAQ with relevant parties in their organizations prior to applying for this grant to confirm that their organization will be able to execute the agreement *without amendments and modifications*, and in a timely manner should a grant be awarded. The Cooperative Agreement text can be found on the Call for Applications webpage:

<https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

### 3.3 Subgrantee Requirements and Compliance

Subgrantees must comply with the following requirements:

1. Begin implementation of the proposed projects by January 1, 2027, even if staff still need to be hired. Implementation is defined as launching projects in accordance with the subgrantee's approved Work Plan, but not necessarily service delivery.
2. Complete Jewish Federations' new one-hour online course about the PCTI approach within the timeline provided by Jewish Federations, which is mandatory for ALL staff charging time to this grant as listed on the budget(s). If there are staff changes, the new staff member charging time to this grant must take the one-hour online training course.
3. Participate in quarterly check-in meetings with Jewish Federations staff about project implementation.
4. Join webinars on topics related to the Service Populations; programmatic, financial, and evaluation components of the grant; and the PCTI approach.
5. Attend Center-hosted annual, in-person training events (ex. Aging and Trauma Program Showcase, Training Workshop).
6. Plan site visit(s), if convened by Jewish Federations' staff, and respond to feedback.
7. Serve as a peer mentor and thought leader in the field of PCTI care by sharing best practices and lessons learned with other subgrantees and aging service providers.
8. Train others in the PCTI approach by presenting on webinars and at conferences, if requested by Jewish Federations.

9. Spend the total program budget, which includes Jewish Federations' grant funds and matching funds, by the end of the grant period. No extensions are available, unless in rare exceptions with written approval from Jewish Federations. All unused funds must be returned to Jewish Federations.
10. Incorporate ways to sustain projects beyond the grant period and create a sustainability plan. This includes sharing knowledge gained through participation in the Innovations Program with others, so the PCTI approach becomes the accepted strategy for serving older adults (e.g., presenting at conferences, posting resources and publications online).

### **3.3.1 Project Changes**

Subgrantees may not change or create new projects with awarded funds during the tenure of the grant without Jewish Federations' prior written approval. Should the subgrantee need to make changes to the approved grant-funded projects, a completed and submitted Project Modification Request is required. Proposed project modification(s) may be approved if the outcome remains the same, the evaluation remains the same, the project continues to demonstrate innovation, and the project stays within the same awarded funding level. Failure to comply with these requirements could result in termination of the grant, reimbursement of used and/or unused awarded funds to Jewish Federations, and reimbursement of awarded funds for unapproved projects.

### **3.3.2 Public Health Considerations**

In the event of a public health emergency, subgrantees must operate projects safely following either Centers for Disease Control (CDC) guidelines or local government requirements. If the guidelines differ, subgrantees must follow the standard that imposes the stricter protective measures.

### **3.3.3 Confirmation of Service Population Eligibility**

Subgrantees must develop and maintain a process to confirm that project participants are:

1. Holocaust survivors;
2. Older adults aged 60 or older with a history of trauma; and/or
3. Family or friend caregivers who are providing care to their family or friend and are either:
  - a. currently providing care to an older adult (aged 60 or older) with a history of trauma, or aged 60 or older themselves.

### 3.3.4 Liability Waivers

Subgrantees must require all participants of Jewish Federations-funded projects to sign the legal Waiver and Release of Liability Form: [https://cdn.fedweb.org/fed-42/2/Waiver\\_and\\_Release\\_of\\_Liability\\_Form\\_2026\\_Feb\\_2026.docx](https://cdn.fedweb.org/fed-42/2/Waiver_and_Release_of_Liability_Form_2026_Feb_2026.docx). Jewish Federations can provide this form in Russian, Ukrainian, and Farsi. Records of all signed forms must be retained by the subgrantee for four years from the end of the Program Period (or longer if litigation is pending) and provided to Jewish Federations upon request.

## 3.4 Evaluation Requirements

Subgrantees are required to evaluate the impact of each grant-funded project according to Jewish Federations' Common Evaluation Strategy. This enables Jewish Federations to identify grant impact, promising practices, and potential for project replication. The disbursement of any portion of grant funds is subject to the condition that subgrantees support the development of their evaluation and collect and submit evaluation data to Jewish Federations. Failure to implement the Common Evaluation Strategy and/or submit impact data through Jewish Federations' approved database may result in termination of the grant award.

During the first six months of the grant, Jewish Federations will work closely with subgrantees to develop evaluation tools and timelines for each grant-funded project according to the Common Evaluation Strategy. Jewish Federations will share with the subgrantee custom evaluation tools, including proposed project impacts, goals, data collection approach, and finalized data collection instruments. These tools and timelines ensure that data is collected uniformly on the key and common performance indicators across the Innovations Program.

### 3.4.1 Data Collection Requirements

Subgrantees must collect the following data indicators from each project:

- Number of participants
- Percentage of participants satisfied with their participation
- Net Promoter Score (likelihood of direct service recipient to recommend participation)
- Percentage of participants with improved outcomes (four to five indicators specific to outcome categories of improved physical health, mental health, social health, spiritual health, financial health, access to home and community resources, family caregiving experience, and PCTI approach understanding)

- Subgrantee-specific indicators, if needed (two to three subgrantee-requested indicators specific to the project)
- Percentage of participants with improved overall health (defined as health of the mind, body, or spirit)
- Percentage of participants with improved overall well-being (defined as quality of life or life satisfaction)
- Participant feedback to improve future projects

Data is collected on each indicator through pre-established questions. Adjusting question and response wording is at the discretion of Jewish Federations, as the wording has been specifically developed to be both PCTI and consistent across all grant-funded projects.

### **3.4.2 Subgrantee Evaluation Responsibilities**

Subgrantees must comply with the following evaluation requirements:

1. Complete all evaluation reports including, but not limited to, the project participant report, programmatic reports, evaluation update report, and any other evaluation reports as reasonably requested by Jewish Federations.
2. Administer the survey(s) to project participants according to the Common Evaluation Strategy.
3. Collect and submit approved surveys, both qualitative and quantitative data, to Jewish Federations to satisfactorily demonstrate project impact and document the details of project replication. Project evaluation tools and timeline shall be finalized by June 2027, six months into Program Period 1.
4. Ensure timely and accurate collection of data. Enter all survey data in a timely manner into Jewish Federations' database, QuestionPro, a HIPAA compliant survey software. Utilize all Jewish Federations' reporting templates maintained in the Innovations provided.
5. Participate in evaluation trainings including, but not limited to, an evaluation orientation and introduction to PCTI evaluation.
6. Participate in at least two evaluation consultation and check-in meetings with Jewish Federations' research and evaluation team.
7. Prepare for evaluation consultation meetings.
8. Provide feedback on evaluation documentation.
9. Notify Jewish Federations in a timely manner if changes to the evaluation collection approach and tools are needed.

10. Participate in local and national evaluations of PCTI services, as Jewish Federations may request.

### **3.4.3 Use of Supplemental Evaluations**

Subgrantees may conduct additional evaluations of their projects beyond Jewish Federations' requirements. These additional and elective evaluations would be considered supplemental, and do not replace the evaluation requirements listed above. If a subgrantee chooses to develop and implement supplemental evaluations for the purposes of this grant, the subgrantee must do their best to ensure that supplemental evaluations are PCTI. Data and insights from this supplemental evaluation can be shared with Jewish Federations at the discretion of the subgrantee.

## **3.5 Reporting Requirements**

Subgrantee reporting requirements and sample reporting templates are listed below, which are subject to change.

1. [Quarterly Financial Workbook](#), which includes the Financial Reporting Form and Evidence of Match Form
2. [Quarterly Project Participant Report](#)
3. [Programmatic Report](#)
4. [Work Plan](#)
5. [Evaluation Update Report](#)
6. [Subgrantee Technical Support Survey](#) (subgrantees evaluate the Center's support)
7. [Final Report](#)
8. Other forms created or modified during the grant period

## **3.6 Compliance with Federal Statutory Authority and Provisions**

Jewish Federations funds this program through a grant from the U.S. Department of Health and Human Services Administration for Community Living/Administration on Aging. Funds awarded in response to this RFP will include federal funds. The recipients of awarded funds must commit to the terms and conditions for receiving federal funds from Jewish Federations, which may change or be updated by the federal government during the program period. Awardees are subject to federal laws outlined in the Cooperative Agreement.

### 3.6.1 Unique Entity ID (UEI) Requirements

All applicants must apply for and maintain a Unique Entity ID (UEI), unless they have a documented federal exemption, to receive any grant funds. Applicants must begin the process to obtain a UEI by the time this application is submitted. Applicants must document that they have begun the process to obtain a UEI, and successful applicants must confirm to Jewish Federations their UEI by the time funding is disbursed.

#### Steps to Obtain a UEI

To obtain a Unique Entity ID go to [SAM.gov](https://sam.gov) and create a [Login.gov](https://login.gov) account by selecting "Get Started" on the workspace, and choosing "Get a Unique Entity ID". You must provide your legal business name, physical address, and documentation for validation. SAM.gov is a **free service**.

- **Sign in/Register:** Go to [SAM.gov](https://sam.gov) and sign in using your Login.gov credentials.
- **Start Request:** On the workspace page, select "Get Started" under the "Register Entity" or "Get a Unique Entity ID" section.
- **Choose Option:** Select "Get a Unique Entity ID" if you only need the identifier and are not immediately registering to bid on contracts.
- **Validate Entity:** Enter your legal business name, physical address, and, if required, entity incorporation details (e.g., state of incorporation, year).
- **Confirm and Receive:** Review your information, certify its accuracy, and click "Submit" to receive your UEI.

## 4. Application and Review Process

### 4.1 Application Timeline

Below is the application timeline:

|                           |                                                 |
|---------------------------|-------------------------------------------------|
| Monday, March 30, 2026    | Informational Session                           |
| Wednesday, April 15, 2026 | Intent to Apply Due                             |
| Friday, April 24, 2026    | Deadline for Clarifying Questions About the RFP |

|                                |                                                                       |
|--------------------------------|-----------------------------------------------------------------------|
| <b>Friday, May 15, 2026</b>    | Stage 1 Application Due                                               |
| <b>June - November 2026</b>    | Notification of Advancement to Stage 2<br>and Stage 2 Application Due |
| <b>December 2026</b>           | Award Announcement                                                    |
| <b>December 2026</b>           | Signed Cooperative Agreement Due                                      |
| <b>Monday, January 1, 2027</b> | Program Implementation Begins                                         |

## 4.2 Application Process

In accordance with the application timeline, the following section outlines the application process.

### 4.2.1 Informational Session

Applicants are encouraged to participate in the optional Informational Session via a Zoom webinar, when Jewish Federations' staff will review this RFP and Program Guidelines. Staff will answer clarifying questions asked in the Q&A chat function of the webinar and questions e-mailed in advance to [Aging@JewishFederations.org](mailto:Aging@JewishFederations.org) with the subject line, "RFP Clarifying Question." Questions sent in advance will receive priority on the webinar. The Informational Session will be recorded and posted on the Center's Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>. Jewish Federations cannot provide an opinion on application ideas.

**Informational Session Date:** Monday, March 30, 2026, from 2:00-3:00pm ET

Please [click here](#) to register for the Informational Session.

### 4.2.2 Intent to Apply

Applicants must complete and submit an Intent to Apply form by 11:59pm ET on Wednesday, April 15, 2026, to be eligible to submit a full application. In the application portal, the Intent to Apply is known as the LOI. Jewish Federations uses this information to confirm eligibility and to estimate the number of Review Committee members needed.

The Intent to Apply includes the following information:

1. Full legal organization name and address
2. Applicant's contact name, title, e-mail address, and telephone number
3. Eligibility questions. **Applicants that respond "No" to any of the following questions will be ineligible to apply:**
  - a. Is your organization based in the United States? (Yes, No)
  - b. Does your organization fit into one of the following categories? Domestic public or private non-profit entities including state and local governments, Indian tribal governments and organizations (American Indian/Alaskan Native/Hawaiian Native/Native American), faith-based organizations, community-based organizations, hospitals, and/or institutions of higher education? (Yes, No)
  - c. Has your organization filed its 2024 and/or 2025 audit report that includes a management letter, consolidated statement of activities, functional expenses, and cash flow? (Yes, No)
  - d. Is your organization a direct service provider to populations that include, but are not necessarily limited to, Holocaust survivors, older adults (aged 60 or older) with a history of trauma, and/or family caregivers? (Yes, No)
  - e. Will your organization obtain a Unique Entity Identifier (UEI) number by the time your application is submitted? (Yes, No)
  - f. If awarded, will your organization accept the terms and conditions of Jewish Federations' Cooperative Agreement? An organization's leadership must agree to all provisions without exception and sign the document "as is." Jewish Federations will not negotiate, amend, and/or modify the Cooperative Agreement for individual organizations in connection with a Subgrant award. (Yes, No)

Following submission of the Intent to Apply, applicants will receive an e-mail confirming receipt.

#### **4.2.3 Clarifying Questions About the RFP**

Applicants may submit questions to clarify any aspects of this RFP via e-mail to [Aging@JewishFederations.org](mailto:Aging@JewishFederations.org) until Friday, April 24, 2026. Answers to clarifying questions will be posted on the Center's Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>. Jewish Federations cannot provide an opinion on application ideas. Questions received after 11:59pm ET on Friday, April 24, 2026, will not be answered.

#### **4.2.4 Stage 1 Application**

Applicants must submit a completed application, including Questionnaire, Work Plan, Budget Application Workbook, and Financial Documentation by 11:59pm ET on Friday, May 15, 2026. A volunteer Review Committee will score completed applications. Jewish Federations will then apply a scoring rubric.

#### **4.2.5 Stage 2 Application**

Based on the Review Committee's scores, Jewish Federations' scoring rubric, and applicants' past compliance with the Center's grants (if applicable), Jewish Federations will notify applicants whether the application has advanced to Stage 2. Jewish Federations' staff will counsel applicants that have advanced to Stage 2 on how to modify their proposal to meet available funding, respond to the Review Committee's questions, and comply with the Innovations Program Guidelines. During Stage 2, applicants will submit the Stage 2 Application Questionnaire, Stage 2 Budget Workbook, Stage 2 Work Plan, and Banking Information.

Jewish Federations strongly encourages applicants who are notified of progressing to Stage 2 to begin the search and hiring process for any staff and consultants necessary to implement proposed projects so project activities can begin on January 1, 2027.

#### **4.2.6 Award Notification and Cooperative Agreement**

Based on the quality of the Stage 2 application submission, Jewish Federations will send an award letter and Cooperative Agreement to successful applicants by December 2026. The Cooperative Agreement is the standard agreement that all selected subgrantees are required to execute as a condition of award, without negotiation or modification. The disbursement of any portion of the grant is subject to the condition that the Cooperative Agreement is executed by the subgrantee and Jewish Federations.

#### **4.2.7 Program Start Date and Funds Wired**

Program Period 1 begins with the implementation of the proposed projects as of January 1, 2027, regardless of pending staff hires. Implementation is defined as initiating program launch, but not necessarily service delivery. Jewish Federations intends to wire the first installment of grant funds in January 2027.

## **4.3 Review Processes**

Applications will be evaluated based on innovation, incorporation of the PCTI approach, sound planning, feasibility, and likelihood of resulting in the stated outcomes. This evaluation is composed of Review Committee scores and Jewish Federations' scoring rubric.

### **4.3.1 Review Committee Scoring**

Jewish Federations will convene a volunteer, external Review Committee to review and score applications. The Review Committee is comprised of professionals and lay leaders with knowledge of aging services, family caregiving, program planning and evaluation, trauma-informed care, and/or organizational capacity building. These Review Committee members will be trained on the review process and allot points based on the quality of applicants' responses. Questions are worth 0, 5, 10, 15, or 20 points. The quality is rated on a spectrum ranging from insufficient, to average, to excellent. The lowest number of points indicates an insufficient response, and the highest number of points indicates an excellent response.

The number of projects included in the application does not influence the evaluation and final score. Applicants may include supporting letters from community partners or public officials, but these letters will not add points to the score.

### **4.3.2 Jewish Federations' Scoring Rubric**

After applications have been scored by the Review Committee, applications will be scored using Jewish Federations' scoring rubric. The purpose of the rubric is to ensure that the Innovations Program is comprised of a variety of innovative PCTI projects necessary to meet the goals of Jewish Federations' grant from ACL. This rubric considers topics such as organization type, degree of project innovation, geographic location of the project, and applicant past performance in Jewish Federations' grants (if applicable).

The rubric also helps level the playing field between applicants with and without prior Jewish Federations' grant funding experience. Previous funding from Jewish Federations does not influence the evaluation and final score. However, if applicable, subgrantee past performance will be considered. Jewish Federations aims to fund both agencies that have and have not previously received a grant.

# 5. Application Completion

## 5.1 General Application Instructions

### 5.1.1. SurveyMonkey Apply

All components of the application must be completed using Jewish Federations' templates and submitted via SurveyMonkey Apply (SMA).

Applications submitted after the deadline, outside of SMA, or without using the templates will not be reviewed, without exception.

Access to SMA and a tutorial on how to use SMA can be found on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

### 5.1.2. Submitting a Strong Application

Below is guidance on how to submit a strong application:

- Submit a complete application *at least* three business days prior to the deadline to allow time to address technical questions. Send technical questions to: [Aging@JewishFederations.org](mailto:Aging@JewishFederations.org).
- Ensure all acronyms are written out the first time they are used in each document.
- Note that character count includes spaces and punctuation. To verify character count, visit <https://charactercounttool.com/>.
- Include and cite research that supports the success of the proposed intervention.
- Examine the full application to ensure responses and project information are consistent in the Program Questionnaire, Work Plan, and Budget Application Workbook.
- Ensure the application is clear, cohesive, and includes all information necessary for the Review Committee to understand the organization and the proposed project(s) without reviewers having to do any outside research. To avoid conflicts of interest, Review Committee members will not review applications of organizations with which they are already familiar, and they will not receive any information beyond what is included in the application.

### 5.1.1. Application Components

A complete Innovations Program application consists of the following components:

1. Basic Information
2. Project Questionnaire
3. Organization Capacity and Grant Sustainability
4. Work Plan
5. Budget Application Workbook
6. Additional Documents

All application templates can be found here:

<https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

## 5.2 Basic Information

The Review Committee will have access to the Basic Information section, but they will not score it. Basic Information includes the following:

- a. Organization Contact Information
  - a. Full Legal Organization Name
  - b. Organization Address
  - c. Applicant Contact's Full Name
  - d. Applicant Contact's Title
  - e. Applicant Contact's E-mail Address
  - f. Applicant Contact's Telephone Number

CEO's Name (Including Prefix)

- g. CEO's E-mail Address

Application Overview

- a. From the drop-down menu, select the category that best describes your organization.  
(Adult Day Care; Faith-Based Organization; Foundation; Higher Education Institution; Home Care/Home Health Agency; Home or Community-Based Social Service Agency; Hospital; Independent Living/Senior Housing/55+ Communities; Indian Tribal Government/Organization; Legal Services Provider; Meals Program; Mental Health Clinic/Agency; Nursing Home; Patient Care/Healthcare; Residential Care Facility/Assisted Living; Senior Center; State or Local Government Agency/Public

Services; Transportation Provider; Veterans Affairs Facility; Victim Services Program; Other)

- b. From the drop-down menu, indicate the amount of funds for Program Period 1 requested from Jewish Federations. Do not include matching funds. (Option A: \$60,000 each Program Period for one or two projects, or Option B: \$105,000 each Program Period for one or two projects.)
- c. From the drop-down menu, select the number of projects proposed in the application. For the definition of a project, refer to Section 1.4, the Supplemental Project Guidance document and video tutorial located on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.
- d. Provide a brief overview of the history and mission of the organization. Include a brief overview of the services the organization offers and the population(s) it currently serves. (1,000 characters)
- e. Select whether the organization has or has not received funding from the Center's federal grant program any time since 2015. The Center will award funds to organizations that have and have not received prior grants. (Yes, the organization has received funding from the Center's federal grant program as a subgrantee or sub-subgrantee. No, the organization has NOT received funding from the Center's federal grant program as a subgrantee or sub-subgrantee)
- f. Does the organization have a Unique Entity ID (UEI)? (Yes, No)
  - a. Enter the organization's UEI number, if applicable.
- g. Does the organization grant Jewish Federations permission to share this proposal or parts of it with other potential funders or interested parties? There is no penalty if the organization does not want to share this proposal. (Yes, No)

## 5.3 Questionnaire

### Project Questions

Responses to the questions in this section are required for each project included in the proposal. Regardless of whether a proposal includes one or two projects, the project questionnaire section is worth a total of 150 points and scored based on the following questions.

1. List the name of each project. (0 points, 50 characters)

To name your project(s), select a short phrase that communicates the activity performed. For example, a project that aims to reduce food insecurity could be named "Nutrition Assistance" or

“Food Delivery.” Project names that do not clearly identify the service, such as “Community Cares,” should be avoided. These names are for Jewish Federations’ reporting and identification, not for marketing. Project names must be the same in all application documents, including the Program Questionnaire, Work Plan, and Budget Application Workbook.

2. Provide a summary of the project. (20 points, 2,500 characters)

A project summary should include the project name, the proposed intervention, several key activities, the Service Population to be supported, and the proposed outcome category. It should also include details about which activities will be conducted in Program Periods 1 and 2, as well as a few measurable results. For more information and examples refer to sections 1.4 and 1.5 and the How to Define a Project explanation and video located on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

An example of a well-defined project: “Organization Name will implement the Healing Through Connection: A Group Therapy Project for Holocaust Survivors. The intervention is group therapy sessions for Holocaust survivors to discuss different mental health topics (such as grief, care for loved one, etc.) with the intent to improve mental health. In Program Period 1, activities include hiring and onboarding staff, training the group therapist in the PCTI approach, and conducting outreach to participants. In Program Period 2, activities include providing sessions on different topics, conducting an evaluation of project outcomes, and adjusting group therapy sessions based on evaluation results and feedback. As a result of the group therapy project, Holocaust survivors may experience reduction in stress, anxiety, and depression. They may also feel an increased sense of connection, learn coping skills, and confidence in maintaining their mental health.”

3. Select the Service Population(s) this project will serve. Select all that apply. (0 points)

Options include:

- a. Holocaust survivors
- b. Older adults (aged 60 or older), not including Holocaust survivors, with a history of trauma
- c. Family caregivers either currently caring for an older adult (aged 60 or older) or currently aged 60 years or older themselves

4. If the organization plans to serve older adults with a history of trauma and/or family caregivers, explain how staff will ensure in a PCTI way that older adults and/or family caregivers served through this project are age 60 or older. If serving both older adults and family caregivers, please provide responses for both populations. *For the purposes*

*of this grant, family caregivers must either provide care to someone age 60 or older OR be age 60 or older themselves. (5 points, 500 characters)*

5. Describe the organization's history of supporting the proposed Service Population(s), including services currently provided and the number of people in the Service Population(s) the organization is currently serving. (10 points, 1,000 characters)
6. Describe how the proposed project serves the unmet needs of project participants as it relates to their history of trauma. Provide a rationale, citing relevant data, for selecting the Service Population(s). (20 points, 1,000 characters)
7. Provide the number of unique anticipated participants for each project by participant type and Program Period. (20 points)

| Project Participant Type                                                                    | Unique Participants for Program Period 1:<br>Jan 1, 2027 – Sep 30, 2027 | Unique Participants for Program Period 2:<br>Oct 1, 2027 – Jun 30, 2028 | Unique Participants for Entire Grant Period:<br>Jan 1, 2027 – Jun 30, 2028 |
|---------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Holocaust Survivors                                                                         |                                                                         |                                                                         |                                                                            |
| Older Adults with a History of Trauma (aged 60 or older, not including Holocaust Survivors) |                                                                         |                                                                         |                                                                            |
| Family Caregivers                                                                           |                                                                         |                                                                         |                                                                            |
| Professional Service Providers Trained                                                      |                                                                         |                                                                         |                                                                            |
| Volunteers Trained                                                                          |                                                                         |                                                                         |                                                                            |

8. List proposed project intervention. (5 points, 100 characters)
  - i. An intervention is a method or process to prevent harm or improve functioning. There can be only one intervention per project. (e.g., socialization events, chair yoga, individual therapy, pastoral counseling, case management). For more information, see section 1.4 and the Supplemental Project Guidance document and video tutorial located on the Call for Applications webpage: <https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

9. Select one project outcome. (5 points)

- i. An outcome is a result of a project on participants (e.g., improved mental health among family caregivers, reduce social isolation among Holocaust survivors). While projects may achieve many outcomes, for the purpose of the Center's evaluation, each project should have only one primary outcome. For more information about project outcome categories see sections 1.4 and 1.5.

Response options include:

- a. Improved physical health
  - b. Improved mental health
  - c. Improved social health
  - d. Improved spiritual health
  - e. Improved access to home and community resources
  - f. Improved financial health
  - g. Improved family caregiving experience
  - h. Improved understanding of the PCTI Approach
10. Explain how the project would be innovative from the services currently provided by the organization to project participants. Clarify what is a new and/or expanded idea, method, product, or service for the field or organization. If an organization has operated a project similar to the one proposed, whether or not the project has been funded by Jewish Federations, detail what will be different, new, innovative, and/or expanded. Please note that increasing participant numbers without implementing an innovative concept does not meet the innovation threshold. (15 points, 1,000 characters)
11. Explain how the organization will include project participants in the planning and implementation of the proposed services. (15 points, 500 characters)
12. Explain how the proposed project will incorporate PCTI principles. (20 points, 1,000 characters)
13. Explain how the organization intends to staff the project. Describe whether the organization will hire new staff and/or fund existing staff. (15 points, 500 characters)

### **Capacity and Grant Sustainability Questions**

This section on capacity and sustainability is worth 75 points.

1. Explain the organizational capacity and infrastructure available to implement all projects. If the project relies on hiring staff, then briefly explain how project activities will be implemented until all positions are filled. (20 points, 1,000 characters)
2. Describe the organization's capacity to meet the evaluation requirements of the grant. Explain how the organization will staff evaluation activities, including Jewish Federations' evaluation consultations and training, data collection and analysis, and evaluation reporting. (15 points, 500 characters)
3. Do you anticipate needing to obtain approval from an internal review board (IRB) to implement the evaluation requirements of this grant? (Yes, No) If yes, please explain and note an approximation of how long it may take to obtain approval. (0 Points, 100 characters)
4. Explain the organization's plan to disseminate lessons learned from the grant to the broader aging services network. (5 points, 500 characters)
5. Explain the organization's strategy to sustain the program after the grant period ends. Describe the organization's plans to infuse PCTI principles into overall organizational operations, if applicable. (20 points, 1,000 characters)
6. Explain how the organization will prevent negative impacts on program participants after the grant period. (15 points, 500 characters)

## 5.4 Work Plan

### 5.4.1 Work Plan Instructions

Complete the Work Plan Template by following the directions below. Upload the completed Work Plan to SMA. The guidance in this section is best utilized when read in combination with the [Work Plan Template](#) and [Sample Work Plan](#).

**Step 1.** Complete the first tab of the Work Plan template by entering the names of each project. Use the same project name(s) on all application materials. Create a Staff Title Key by listing each staff position entered in the Work Plan and their associated abbreviation (e.g., SVP - Senior Vice President, CM - Case Manager).

**Step 2.** Complete a separate Work Plan in subsequent tabs for each project. Work Plan charts for distinct projects are located on tabs two and three. If the application includes only one project, leave the remaining tab blank. For each project, follow steps 3 through 7.

**Step 3.** List the project name, selected outcome category, and intervention of the project at the top of the chart. For more information about outcomes and interventions, see section 1.5.

An **outcome** is a result of a project on participants (e.g., improved mental health among family caregivers, reduce social isolation among Holocaust survivors). For more information about project outcome categories, see sections 1.4 and 1.5 and the Supplemental Project Guidance document and video tutorial located on the Call for Applications webpage:

<https://holocaustsurvivorcare.jewishfederations.org/call-for-application>.

An **intervention** is a method or process to prevent harm or improve functioning. There can be only one intervention per project. (e.g., socialization events, chair yoga, individual therapy, pastoral counseling, case management).

**Step 4.** Next, describe the key tasks next to the numbered row. Key tasks are the main activities required to achieve the intervention (e.g., recruit participants). Ensure that the following key tasks include, but are not limited to, hiring and orientation, participant outreach, service implementation activities, evaluation activities, quarterly reporting, and sustainability plans.

**Step 5.** Then, list all relevant activities under each key task. These are activities required to accomplish the key task. Add and delete rows for key tasks and activities as needed. (e.g., for recruiting participants an applicant can create outreach fliers, refer participants from case management, and share information about events with network organizations).

**Step 6.** In the column titled Lead Person(s), note the job title of the individual who will take the lead on accomplishing the task.

**Step 7.** Indicate the anticipated completion date(s) for the activities by filling in the cell(s) corresponding with the month(s) when the activity will be implemented. Note, projects can begin and end at different times throughout the grant period.

#### 5.4.2 Work Plan Scoring

The Work Plan is worth 100 points and is scored based on the following:

1. The applicant completed separate tabs for each project. (5 points)

2. The applicant ensured that the project name(s) and outcome categories are the same as those listed on the Application Questionnaire and Budget Application Workbook. (5 points)
3. The applicant designed the Work Plan so that grant implementation will begin January 1, 2027. (5 points)
4. Key tasks are comprehensive and reasonable (including, but not limited to, hiring and orientation, participant outreach, evaluation activities, and quarterly reporting). (15 points)
5. Activities are comprehensive and relevant. (10 points)
6. Timeframes for activities are realistic. (20 points)
7. The amount of work required for each staff member is feasible and realistic. (20 points)
8. The Work Plan demonstrates the applicant's ability to plan, manage, monitor, and report on project activities. (20 points)

## 5.5 Budget Application Workbook

Please review the following guidance alongside the [Budget Application Workbook](#), which is comprised of the following documents:

1. Financial Questions
2. Budget Instructions and Summary
3. Proposed Project 1 Budget
4. Proposed Project 2 Budget (if applicable)

Detailed instructions are in each tab of the Budget Application Workbook. The Budget Application Workbook must be completed and uploaded as an **Excel file**, not a PDF. Submitting the Budget Application Workbook in another format or not using the Budget Application Workbook template will result in disqualification from consideration.

### 5.5.1 Financial Questions

Complete the Financial Questions, located in the first tab of the Budget Application Workbook. Indicate whether you are applying for one or two projects. Select the funding level for which you are applying, either \$60,000 or \$105,000. You may select the funding level by clicking on the dropdown arrow in cell C21. The funding level for which you are applying must be the same in Program Period 1 and 2. The Total Match Requirement, Total Budget Requested, and Total 18-

Month Budget Requested will automatically calculate. Answer the organization's background questions completely and accurately.

### 5.5.2 Budget Instructions and Summary

Review the Budget Instructions and Summary, located in the second tab of the Budget Application Workbook, which offers detailed guidance on completing the proposed project budget(s) in the successive tabs. Key requirements include:

- **Reasonable Expenses:** Per federal guidelines, line items in project budgets must be reasonable, necessary, and allocable. Cost-effective budget proposals will be reviewed favorably.
- **Match Requirement:** Grant funding from Jewish Federations and match contributions are subject to the same requirements. Subgrantees must raise the required match for Period 1 by June 30, 2027, and submit evidence of such match to Jewish Federations by July 31, 2027. For Period 2, Subgrantees must raise the required match by December 31, 2027, and submit evidence of such match to Jewish Federations by January 31, 2028.
- **Salary Cap:** Salary Cap: Subgrantees may not compensate individuals above the Federal Executive Level II salary cap of \$228,000 annually, with any excess covered by non-federal sources. The cap applies to employees' base salary (excluding benefits) and is prorated based on effort (e.g., 20% FTE = \$45,600). Payments to contractors for professional services are also subject to the \$228,000 cap, regardless of billing method. Compensation is reviewed for reasonableness (2 CFR 200.404) and to ensure it does not exceed the cap. Staff-equivalent contractors, who perform ongoing, integrated work similar to employees, are subject to the cap, while limited or episodic contracting or consulting (e.g., part-time clinicians or program facilitators) is generally evaluated under reasonableness standards and not treated as staff-equivalent employment subject to the cap. Arrangements designed to circumvent the cap, such as splitting payments or disguising staff-equivalent labor as consulting, are prohibited.
- **Staff Training:** Any staff, consultant, speaker, contractor, or volunteer listed in the personnel section of a project budget is required to be trained in the PCTI approach, no matter the percentage of time and commitment attributed to the project(s). Proof of participation in the mandated training will be required.
- **Indirect Costs**
  - (i) **Applicants *without* an Indirect Cost Rate Agreement** may elect to charge up to a de minimis rate of 15% of modified total direct costs, which include project activities and related staff supported by Jewish Federations funds and match

contributions. When applying the de minimis rate, costs must be consistently charged in the budget(s) as either direct or indirect costs and may not be double charged or inconsistently charged as both (2 CFR 200.414(f)).

(ii) **Applicants *with* a current Indirect Cost Rate Agreement** must apply their federally approved indirect cost rate in accordance with the terms of their ICRA and 2 CFR 200. A copy of the current ICRA must be submitted with the application. Costs covered by the ICRA may not be charged directly to the project budget, whether funded by Jewish Federations funds or match contributions.

- **No-Cost Extensions:** No-cost extensions will not be available, unless in rare exceptions and approved in writing by Jewish Federations. Grant funds from Jewish Federations and matching contributions must be expended by the end of their respective period. Unused funds must be returned to Jewish Federations within 30 days of either: (1) the conclusion of Period 1 if no Period 2 funding is issued; (2) the conclusion of Period 2 if Period 2 funding is issued; or (3) the conclusion of the project(s) because of early graduation or termination requested by Jewish Federations or the applicant.

## 5.6 Additional Financial Documents to Upload

1. Organization budget for the last completed fiscal year
2. Organization budget for the current fiscal year
3. Organization's current Indirect Cost Rate Agreement (if applicable)
4. Independent Audit Letter (Management Letter): Most recent organization audit report that includes a management letter, consolidated statements of activities, functional expenses, and cash flow, clearly identified by fiscal year in the file name
5. Organization Single Audit (also known as Subpart F or A-133), clearly identified by fiscal year in the file name (if applicable)
6. Organization's current IRS tax-exempt status determination letter or most current Form 990, or Certificate of Incorporation or equivalent document for qualified religious agencies not required to file Forms 990 and 1023
7. Verification of UEI or verification that a UEI request is in progress.

## 5.7 Budget Scoring

The budget is worth 150 points and scored based on the following criteria:

1. The Financial Questions responses demonstrate the applicant's ability to manage, monitor, and report on grant implementation and spending. (20 points)
2. In each Project Budget, expenses and income are equal to the funding request and required match. (10 points)
3. In each Project Budget, funding is allocated to the match. (10 points)
4. Funding is allocated to participation in the 2027 Training Workshop and 2028 convening. (5 points)
5. In each Project Budget, there are appropriate funds allocated to complete key tasks and activities listed in the Work Plan. (20 points)
6. The Project Budget(s) covers all activities necessary to meet the goals proposed in the Work Plan. (15 points)
7. In each Project Budget, the proposed amount and individual line items are fully explained in the Budget Narrative. (20 points)
8. In each Project Budget, funding is reasonable, necessary, and allocable. (15 points)
9. The Project Budget(s) are cost-effective. (15 points)
10. Correct completion (e.g., lack of errors such as detailed budget narrative for each line item, correct calculations of salaries, correct salary formulas, correct application of match funds, etc.) of the entire Budget Application Workbook. (20 points)

## References

- Colello, K. J., & Napili, A. (2024). *Older Americans Act: Overview and funding* (CRS Report No. R43414). Congressional Research Service. <https://www.congress.gov/crs-product/R43414>
- United States Holocaust Memorial Museum. *Connect with Survivors*. <https://www.ushmm.org/remember/holocaust-survivors>
- United States Substance Abuse and Mental Health Services Administration [SAMHSA]. (2023). *Substance Abuse and Mental Health Services Administration: Practical Guide for Implementing a Trauma-Informed Approach*. (Report No. PEP23-06-05-005). United States Department of Health and Human Services.