


## Dane County CDBG/HOME

RFP Workshops  
 Thursday, April 11<sup>th</sup>, 2024 at 1:00pm  
 Virtual, Zoom Meeting

Friday, April 12<sup>th</sup>, 2024 at 10:00am  
 In-Person, Dane County Job Center




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### Housing Access and Affordability (HAA) Division

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[www.dane.com/devt](http://www.dane.com/devt) (Econ Dev't Resources)




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### Agenda

- ▶ 2025 Funding Available
- ▶ Funding Categories
- ▶ Eligible Activities
- ▶ Meeting a National Objective
- ▶ Aligning to Dane County Consolidated Plan
- ▶ Geographic Requirements
- ▶ 2025 RFP's Timeline
- ▶ 2025 Funding Cycle
- ▶ Scoring Evaluation Criteria
- ▶ Application Requirements
- ▶ Counting Beneficiaries
- ▶ Other Compliance Considerations
- ▶ Best Practices





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### 2025 Funding Available

- ▶ ~\$1.1 Million CDBG Annual Funds
  - ▶ Public Services = 15% of Total CDBG Funds
- ▶ ~\$500,000 HOME Annual Funds (does not include CHDO Funds)
- ▶ ~\$186,000 Community Housing Development Organization (CHDO) Funds
  - ▶ 2025: Estimated \$93,296.25 CHDO Funds
  - ▶ 2024: \$93,296.25 CHDO Funds
- ▶ ~\$1 Million of Unexpended HOME Funds
- ▶ \$1,917,059.40 HOME-ARP Funds \*\*\*Attend HOME-ARP Workshop for more info\*\*\*




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### CDBG/HOME Program Overview: Funding Categories

- ▶ Public Services
- ▶ Public Facilities
- ▶ Public Infrastructure
- ▶ Economic Development
- ▶ Mortgage Reduction
- ▶ Minor Home Repair
- ▶ Major Home Rehabilitation
- ▶ New Rental Construction (CHDO)
- ▶ Rental Rehabilitation
- ▶ Tenant Based Rental Assistance
- ▶ HOME-ARP




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### Eligible Activities

#### Public Services



- ▶ 15% of CDBG Grant Award
- ▶ Covers a wide variety of eligible services
- ▶ Examples:
  - ▶ Employment services
  - ▶ Crime prevention & public safety
  - ▶ Child care
  - ▶ Substance abuse services
  - ▶ Services for Senior Citizens
  - ▶ Services for homeless persons




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### Eligible Activities

#### Public Facilities

- ▶ Public facilities must be open to the public and owned by the nonprofit.



#### Public Infrastructure

- ▶ Only municipalities can apply under this category.
- ▶ Must serve 51% LMI individuals/businesses
- ▶ Cannot be used for buildings related to general conduct of government
- ▶ Examples: Neighborhood facilities such as parks, playgrounds and recreational facilities, public schools, firehouses, and libraries. Public improvements include streets, sidewalks, curbs and gutters, water and sewer lines, flood and drainage improvements, parking lots, utility lines and aesthetic amenities.




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### Eligible Activities

#### Economic Development

To promote a range of economic development projects that create permanent jobs for low-and-moderate income residents.

- ▶ Business Incubators
- ▶ Commercial Rehabilitation
- ▶ Microenterprise Development



#### Mortgage Reduction

To promote homeownership for low-and moderate-income households to acquire a 0% interest, deferred payment loan.

- ▶ Eligibility Requirements for Borrowers
- ▶ Eligible Properties
- ▶ Eligible Costs




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### Eligible Activities

#### Minor Home Repair

To promote the rehabilitation of existing owner-occupied housing as a means to maintain affordable housing. Up to a \$7,500 grant per household.



#### Major Home Rehabilitation

To promote the rehabilitation of existing single-family, owner-occupied housing as a means to maintain affordable housing for the residents. 0% interest, deferred payment loan.




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**Eligible Activities**

**New Rental Construction**  
To develop affordable rental housing for low- and moderate- income residents.



**HOME-ARP**  
To develop affordable rental housing for low-and moderate- income residents who are identified as qualifying populations.  
\*\*\*Interested parties should attend HOME-ARP session to learn about eligibility information\*\*\*






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**Eligible Activities**

**Rental Rehabilitation**  
To rehabilitate affordable rental housing for low- and moderate- income residents.



**Tenant Based Rental Assistance**  
To promote access to rental housing for low- income households through the provision of rental subsidy assistance.






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**Meeting a National Objective**

Housing and community development activities that primarily benefit low-to-moderate income (LMI) persons.

Meet a National Objective:

- ▶ Benefit to LMI persons
- ▶ Aid in the prevention or elimination of slum or blight
- ▶ Meet a need having a particular urgency




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### Aligning to Dane County Consolidated Plan

Dane County 2025 – 2029 Consolidated Plan currently being drafted.

- ▶ Review the Dane County 2020 – 2024 Consolidated Plan
- ▶ <https://cdbg.countyofdane.com/documents/pdf/FINAL-2020-2024-ConPlan.pdf>
- ▶ Pay attention to page 4; summary of the goals for the CDBG and HOME Programs

▶ All 2025 funded projects will need to align with the Dane County 2025 – 2029 Consolidated Plan.




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### Dane County Urban County Consortium

There are 56 municipalities in the Dane County Urban County Consortium. These municipalities include:

Town of Albion	Town of Medina
Village of Belleville	City of Middleton
Town of Berry	Town of Middleton
Town of Black Earth	City of Monona
Village of Black Earth	Town of Montrose
Town of Bloomington Grove	Village of Mount Horeb
Town of Blue Mounds	Town of Oregon
Village of Blue Mounds	Village of Oregon
Town of Bristol	Town of Perry
Village of Brooklyn	Town of Pleasant Springs
Town of Burke	Town of Pinetown
Village of Cambridge	Village of Rockside
Town of Christiana	Town of Roxbury
Town of Cottage Grove	Town of Rutland
Village of Cottage Grove	Village of Shorewood Hills
Town of Cross Plains	Town of Springdale
Village of Cross Plains	Town of Springfield
Village of Dane	City of Stoughton
Town of Deerfield	City of Sun Prairie
Village of Deerfield	Town of Sun Prairie
Village of DeForest	Town of Vermont
Town of Denmark	City of Verona
Town of Dunes	Town of Verona
City of Fitchburg	Town of Vienna
Village of Maple Bluff	Village of Waunakee
Village of Marshall	Town of Westport
Town of Mazomanie	Village of Windsor
Village of McFarland	Town of York

**EXCLUDED:**  
City of Madison  
Village of Mazomanie  
Town of Dane  
City of Edgerton




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### 2025 RFP's Timeline

CDBG & HOME	Date (Subject to Change)
RFP Issued	April 17, 2024
Addendums or supplements to the RFP posted on the Purchasing Division website	May 13, 2024
Last day to submit written inquiries (2pm CST)	May 17, 2024
Question Response Deadline (2pm CST)	May 24, 2024
Proposals Due (2pm CST)	May 31, 2024




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### 2025 Funding Cycle

CDBG & HOME	Date (Subject to Change)
Proposals Due (2pm CST)	May 31, 2024
Presentations to Application Review Team	July 10 – 16, 2024
Preliminary funding recommendations to CDBG Commission	August 6, 2024
Public Hearing on Final funding recommendations to CDBG Commission	October 1, 2024
Approval of County Board	November/December 2024
Contract Drafting	January – March 2025
Disbursement of Funds	April 2025 (tentative)




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### Scoring Evaluation Criteria

Application Review Criteria	
Item	Maximum Points
1. National Objective – Need and Justification	30
2. Project Approach	30
3. Experience and Qualifications	15
4. Financial Information	15
5. Past Performance	5
6. Partnerships	5
7. Shovel-Ready	5
<b>TOTAL POINTS</b>	<b>105</b>




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### Scoring Evaluation Criteria: National Objective – Need and Justification 30 PTS

- ▶ The program overview adequately describes how the proposed project meets a national objective. (worth up to **5 points**)
  - ▶ Documentation and Justification:
 

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide documentation and/or justification	0 points




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**Scoring Evaluation Criteria: National Objective – Need and Justification 30 PTS**

- ▶ Statements are substantiated and related to the needs and the priorities in the 2025 – 2029 Consolidated Plan. (worth up to 5 points)
  - ▶ Documentation and Justification:
 

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide documentation and/or justification	0 points




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**Scoring Evaluation Criteria: National Objective – Need and Justification 30 PTS**

- ▶ Provides a description of how funds may be targeted to areas of greatest need. (worth up to 10 points)
  - ▶ Documentation and Justification:
 

Excellent	9 – 10 points
Good	6 – 8 points
Average	1 – 5 points
Does not provide documentation and/or justification	0 points




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**Scoring Evaluation Criteria: National Objective – Need and Justification 30 PTS**

- ▶ The organization has developed a process to serve individuals with limited English proficiency (LEP). (worth up to 5 points)
  - ▶ The organization has developed:
 

A Language Access Plan (plan must be included in the RFP application).	1 point
A process to provide interpretation services.	1 point
A process to provide translation services.	1 point
Marketing materials in multiple languages.	1 point
Signage attesting to the services listed above.	1 point




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### Scoring Evaluation Criteria: National Objective – Need and Justification 30 PTS

► Service Area: How accessible is the program geographically to low-and-moderate income persons? (worth up to 5 points)

► Documentation and Justification:

Accessible to low- and moderate income persons.	4 – 5 points
Somewhat accessible to low- and moderate income persons.	1 – 3 points
Not accessible to low- and moderate income persons.	0 points



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### Scoring Evaluation Criteria: Project Approach 30 PTS

► Project description: A description of the work that will be undertaken and a description of how the work will address the identified need. Includes relevant eligibility guidelines, clear referral process. Applicant demonstrates capacity to carry out the project. (worth up to 8 points)

► Documentation and Justification:

Excellent	7 – 8 points
Good	4 – 6 points
Average	1 – 3 points
Does not provide documentation and/or justification	0 points



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### Scoring Evaluation Criteria: Project Approach 30 PTS

► Work plan, Timeline, and Milestones: A work plan for how the project/program will be organized, implemented, operated, and administered, and the timeline and milestones from initiation to completion. Work on the project – meaning funds will be spent – will begin in 2025. (worth up to 7 points)

► Documentation and Justification:

Excellent	7 points
Good	4 – 6 points
Average	1 – 3 points
Does not provide documentation and/or justification	0 points



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**Scoring Evaluation Criteria:  
Project Approach 30 PTS**

- ▶ Outreach and marketing initiatives that will be implemented to inform potential participants and to ensure that they are aware of the services/activities to be provided. (worth up to **5 points**)
  - ▶ Conducts targeted outreach to:
 

5 or more municipalities	5 points
3 – 4 municipalities	3 – 4 points
1 – 2 municipalities	1 – 2 points




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**Scoring Evaluation Criteria:  
Project Approach 30 PTS**

- ▶ Outcomes are identified and can reasonably be expected to be achieved. (worth up to **8 points**)
  - ▶ Documentation and Justification:
 

Excellent	7 – 8 points
Good	4 – 6 points
Average	1 – 3 points
Does not provide documentation and/or justification	0 points




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**Scoring Evaluation Criteria:  
Project Approach 30 PTS**

- ▶ If the project requires temporary displacement, indicates the number of households and describes specific assistance to be provided to households temporarily displaced. (worth up to **2 points**, Maximum points awarded if no displacement)
  - ▶ Documentation and Justification:
 

No Displacement	2 points
Displacement – Identifies households displaced and specific assistance	2 points
Displacement – Does not identify households and/or correct level of assistance	0 points




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### Scoring Evaluation Criteria: Experience and Qualifications 15 PTS

- ▶ The organization has undertaken projects of similar complexity to the one for which funds are being requested (worth up to **4 points**).
- ▶ The organization has experience providing services to low- and moderate income populations (worth up to **3 points**)
- ▶ There are staff resources with the skills and experience to administer and conduct an accountable and responsible project. Key staff with experience in this area are identified. (worth up to **4 points**).
- ▶ There appears to be adequate board and management oversight along with a commitment to quality and service improvement (worth up to **4 points**).




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### Scoring Evaluation Criteria: Financial Information 15 PTS

- ▶ Cost Reasonableness and Effectiveness: An explanation is included on the basis for the cost estimates for the project. The budget is realistic. (worth up to **5 points**)
- ▶ The organization is financially stable. (worth up to **5 points**)
- ▶ Efforts have been made to secure and to leverage other funding for the project. The application identifies eligible sources of match to leverage. (worth up to **5 points**)
  - ▶ 25% of funds leveraged from requested amount will receive the maximum of **5 points**.
  - ▶ Up to 15% of funds leveraged from requested amount will receive **3 points**.
  - ▶ No additional funds identified will receive **0 points**.




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### Scoring Evaluation Criteria: Partnerships 5 PTS

- ▶ Identifies any partnerships that have been or will be formed to ensure the success of the project; describes how meaningful partnerships will enhance the applicant's program (worth up to **5 points**).




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### Scoring Evaluation Criteria: Shovel-Ready 5 PTS

Five points will be awarded to projects that are shovel-ready by Q4 of 2024. Public Services will automatically receive 5 points.

Public Service Projects	5 points
Project is shovel-ready	5 points
Project is <u>not</u> shovel-ready	0 points

Dane County reserves the right at any time post-award notification to rescind applications that are not shovel ready. If project scope changes, post-award notification, the funds may be rescinded.



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### Scoring Evaluation Criteria: Past Performance 5 PTS

Review of the last five years' past expenditures and performance:

<b>Accurate / Consistent Spending of Funds</b>	<b>Up to 3 points</b>
Agency has not returned funds and does not have unexpended funds	3 points
Agency has not returned funds but has unexpended funds from 2 years or more	1 – 2 points
If agency returned funds	0 points
<b>Program or Financial Report deadlines are met</b>	<b>Up to 1 point</b>
<b>Responsive with Communications</b>	<b>Up to 1 point</b>



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### Application Requirements

- ▶ All RFPs will be listed at [www.danepurchasing.com](http://www.danepurchasing.com)
- ▶ Free application – create an account with OpenGov.
  - ▶ <https://procurement.opengov.com/signup>
- ▶ Make sure applicant name matches WI Department of Financial Institutions
  - ▶ <https://wdfi.org/apps/CorpSearch/Search.aspx>
- ▶ Unique Entity Identification (UEI) number replaced DUNS number
  - ▶ To register your entity for a UEI, visit <https://sam.gov/content/entity-registration>.
- ▶ Submit all required documents.
- ▶ Public Services Minimum Request \$5,000 - Max Request \$50,000



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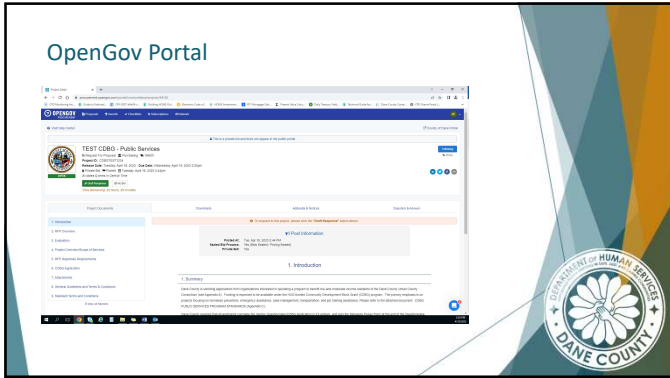
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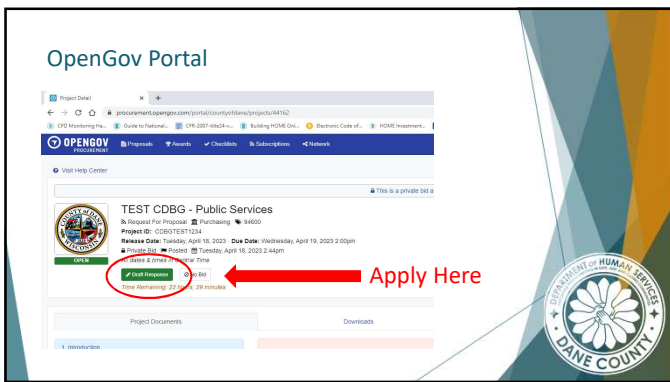
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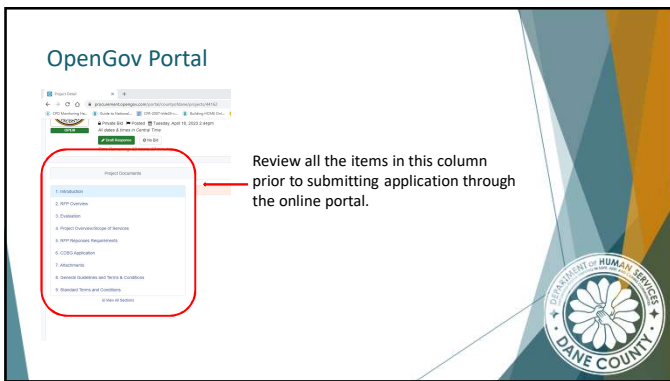
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### Counting Beneficiaries

- ▶ **IMPORTANT:** Do not overestimate the total number of beneficiaries served by the project.
- ▶ The total number of beneficiaries = the total number of forms you **MUST** submit in order to get reimbursed for services.
  - ▶ No duplicative addresses.
- ▶ Look specifically at how the question is worded. Does it ask for individuals or households?
  - ▶ Do not overestimate. Answer the question reasonably.
- ▶ Quarterly beneficiary metrics and financial submission will be required.
  - ▶ **75% of contract expended by September 30, 2025.**




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### Other Compliance Considerations

- ▶ Environmental Reviews on all projects
  - ▶ Radon testing applies to all projects Categorically Excluded Subject to 58.5 (CEST) or higher
- ▶ Section 3 requirements on construction projects funded at or above \$200,001 federal funds
- ▶ Davis – Bacon Requirements
  - ▶ Public Facilities: Any projects utilizing federal dollars for construction.
  - ▶ New Rental Construction: HOME requirement applies when 12+ units are funded with HOME dollars.
- ▶ Build America, By America (BABA) Requirements at or above \$200,001 federal funds
- ▶ Relocation Assistance when Displacement Occurs




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### Best Practices

- ▶ Write the application in 3<sup>rd</sup> person.
- ▶ Read all of the instructions before completing.
- ▶ Submit early to ensure no technical issues!!!
- ▶ Do your math correctly in the budget.
- ▶ Make sure all the appropriate documents are attached.
- ▶ Make sure all the questions are answered fully.
- ▶ Ask questions if there's anything unclear.
- ▶ Check your grammar and spelling.




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**Questions?**



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