



Request for Applications for
SOAR Representatives Benefit Specialist By-Name List
for Austin / Travis County's Homelessness Response System

Responses Due:
February 17, 2025, by 11:59pm CST

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I. Introduction

The Ending Community Homelessness Coalition (ECHO) is a 501(c)(3) non-profit organization. ECHO serves as the Austin / Travis County Continuum of Care (CoC) Collaborative Applicant, Coordinated Entry System Manager, SSI/SSDI Outreach, Access, and Recovery (SOAR) System Manager, SOAR Local Lead for Austin/Travis County and local Homeless Management Information System (HMIS) database administrator.

ECHO believes a home is the foundation people need to lead healthy, fulfilling lives and build thriving communities. Everyone deserves the safety and stability that a home offers. ECHO is committed to ensuring **housing is a human right for everyone who lives in our community**.

II. Summary of Grant Opportunity

ECHO is requesting applications for the SOAR Permanent Supportive Housing (PSH) By-Name List grant from organizations in our Homelessness Response System (HRS) or organizations willing to join the HRS. The funding will also support the overall Permanent Supportive Housing HealthCare Collaborative (PSH HCC). This grant will increase the capacity for organizations to facilitate access to Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), Medicaid, Medicare, for unsheltered people in Travis County using the SOAR model.

ECHO's total award for this grant opportunity is \$788,000 and expects awards up to two grants to non-profit organizations. The grant is not expected to be renewed after two years.

III. Project Overview

The purpose of this grant opportunity is to enhance an organization's capacity to utilize the SOAR model and connect people experiencing chronic homelessness on the PSH By-Name List with federal and state benefits while they wait for and transition into permanent housing. This will be achieved by hiring full-time SOAR Representatives Benefit Specialists (SRBS)

IV. Definitions

"Applicant" means any person or legal entity that submits an application in response to this RFA.

"Chronic Homelessness" means a person has experienced long-term homelessness and has been diagnosed with at least one disabling condition.

"Direct Cost" means those costs that can be directly assigned to an objective under this RFA. Direct Costs include, but are not limited to, salaries, travel, equipment, and supplies directly benefiting the grant-supported project or activity

"Disabling Condition" is a person is not able to make substantial gainful activity due to a medically determinable physical or mental impairment that is expected to last for a continuous period of at least 12 months or is expected to result in death, per Social Security Administration Office.

“Equipment” means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by the non-Federal entity for financial statement purposes, or \$5,000. See CFR §200.1 for Capital assets, Computing devices, General purpose equipment, Information technology systems, Special purpose equipment, and Supplies.

“Grant Agreement” means the agreement entered into between ECHO and the Grantee as a result of this RFA. This may also be referred to as the Contract.

“Indirect Cost” represent the expenses of doing business not specifically tied to a cost objective under this RFA but are necessary to for the operation of the organization and its activities.

“Project Budget” means the financial plan for carrying out the project, as formalized in the Grant Agreement submitted as part of the application in response to this RFA. An Applicant’s requested Budget may differ from ECHO’s approved Budget executed in the final Grant Agreement.

“Homeless Response System” is a coalition of partners working toward ending homelessness in the community. A community governing board, called the Leadership Council, guides the work by identifying best practices, adapting with data, and informing local policy decisions. ECHO and partners carry out the work by creating and implementing solutions in alignment with this guidance.

“Person-Centered Case Management” is a collaborative process between the person receiving services and their case manager, centering the person as the expert on their life .

“PSH By-Name List” is a list of people experiencing chronic homelessness in the Homelessness Response System who are on the Permanent Supportive Housing By-Name List and waiting to receive housing.

“PSH HCC” means Permanent Supportive Housing HealthCare Collaborative (PSH HCC) and is a collaborative to provide integrated behavioral health and medical services to people enrolled in PSH.

“RFP” means this Request for Proposals, including all forms. It may also be referred to as Solicitation.

“SOAR” stands for SSI, SSDI, Outreach, Access, and Recovery and is a proven model with a high success rate designed to assist individuals experiencing homelessness or at risk of homelessness navigate the process of applying for disability benefits through the federal government.

V. Scope of Work

A. Eligible Population

People who served under this RFA include people who are currently on the PSH By Name List and experiencing chronic homelessness.

B. Eligible Service Areas

Projects must be specific to Austin/Travis County.

C. Program Requirements

SRBS will follow the SOAR Written Standards, Best Practices, and Improvement Plan.

Each SRBS will assist appropriately 25-36 unsheltered individuals who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for Social Security disability benefits (SSI, SSDI, Medicare, & Medicaid) through the SOAR model. The applicant must follow the SOAR Written Standards approved by the Leadership Council and found here: [SOAR Written Standards](#).

- D. SRBS will provide SOAR services based off the SOAR Permanent Supportive Housing By-Name List referral for unsheltered individuals.
- E. Each SRBS will be assigned a certain number of applicants off the Permanent Supportive Housing By-Name List to provide SOAR services and MAP.
- F. SRBS will be employed as a full-time employee and cannot combine this role with any other work at the organization. If SRBS meet their quota, then they are expected to complete additional benefit applications.
- G. SRBS work primarily in outreach and must be able to work in the community and meet individuals experiencing homelessness. Applicants may be in encampments, shelters and under bridges, etc., and the SRBS are expected to go to these locations to provide SOAR services.
- H. SRBS will complete interviews with applicants to gather information to complete applications.
- I. Gather medical records and other necessary information to complete SSI/SSDI applications. These forms must include a Function form, and a Work History form specific to the local Social Security Administration Office for Austin/Travis County
- J. SRBS will write SOAR Medical Summary Reports. Medical records must be collected at the beginning of the SOAR process.
- K. SRBS accompany individuals to medical and non-medical appointments including the Social Security Administration Office.
- L. SRBS coordinate visits to medical doctors, psychiatrists, and other specialists to obtain evidence for the application.
- M. SRBS will coordinate person-centered case management services with partners as needed.
- N. SRBS will assist the team with administrative tasks as needed.
- O. SRBS will follow the fidelity of the SOAR model.
 - 1. Serve as the applicant's Appointed Representatives.
 - 2. Complete applications for both Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).
 - 3. Collect medical records from all providers who have treated the applicant, including an updated Mental Status Exam, for claims that include mental health diagnoses.
 - 4. Write and submit a complete Medical Summary Report (MSR) with each application, and, whenever possible, ensure that the MSR is signed by a medical professional.
- P. **Required participation from SOAR Representatives Benefit Specialist**

All SOAR Representatives are required to attend the following:

- 1. SOAR Online Course Review Session
- 2. Virtual SOAR Meeting- Once a month
- 3. Attend the By-Name Staffing Meetings
- 4. Complete the Online Trainings for:
 - a) The Applicant Buy-In Agreement
 - b) Pre-screening for Applicants

- c) Review the SOAR Screening Body Assessment/ Head-to-Toe Assessment
- d) Review of the Social Security and Disability Determination Services Form
- e) Submit Medical Summary Report to SOAR SAMHSA TA Center
- f) Provide SOAR applications to the ECHO SOAR System Manager for review.

VI. Required Reports

ECHO will monitor the Grantee's performance, including, but not limited to, review of financial and programmatic reports and performance measures under any Grant Agreement awarded as a result of this RFA. The Grantee must meet with ECHO monthly the following measures pulled from HMIS reports:

- A. The number of people connected to SOAR under this Project.
- B. Number of successfully approved SSI/SSDI applications; and
- C. Disaggregated counts of clients served by ethnicity/race, household income, and county of residence.

VII. Diversity, Equity, Inclusion & Belonging Statement:

ECHO values diversity, equity, and inclusion in every aspect of its work, including internal operations and external activities to support ECHO's mission. ECHO is committed to cultivating a culture of respect for the dignity and value of each person and family by accessing the Homelessness Response System. These values are essential to ECHO's mission focused on leading and aligning a coalition to administer an effective Homelessness Response System, centered on racial equity, informed by the needs and expertise of people experiencing homelessness, and accountable to systemically marginalized communities.

VIII. Performance Measures

- A. Unexperienced SOAR Representatives Benefit Specialist (SRBS) will be assigned applicants and will complete a minimum of 25 SOAR applications in 12 months, including the time to complete the SOAR Online Course.
- B. Experienced SRBS are expected to complete a minimum of 30 -35 or more SOAR applications per year.
- C. SRBS must maintain a Cumulative 40% Approval Rating for all claim types combined.

IX. Monitoring and Performance Targets

Based on the amount of funding Grantees are awarded, the following individual targets will be set:

- A. Number of people connected to SOAR under this Project; It is expected that Grantee meet at least 90% of its projected number of people connected to SOAR services.
- B. Number of successfully approved SSI/SSDI applications; It is expected that Grantee will have at least 40% of its SOAR applications approved.
- C. Number of reports submitted timely. It is expected that Grantees submit to ECHO at least 90% of all required reports by their due dates.

The Grantee agrees that ECHO staff and its representatives may monitor and audit Grantee performance under its awarded grant.

- A. Grantee agrees to fully cooperate and assist with the coordination of the activities listed below, including, but not limited to:
 - 1. Periodic site visits to monitor for compliance with Grant Agreement.
 - 2. Grant performance.
 - 3. Compliance with the requirements set forth in the RFA.

- B. If a Grantee’s program compliance or performance is lacking, Grant Agreement corrective action recommendations will be made. ECHO reserves the right to impose additional requirements on the Grantee including, but not limited to:
 - 1. Written corrective action plans.
 - 2. Additional reporting.
 - 3. Withholding payments; and/or
 - 4. Termination of contract.

X. Data Use Agreement

Grantees must use the Homeless Management Information System (HMIS) and the SAMHSA’s Online Application Tracking (OAT) database when entering data for this project.

These databases collect the following information but are not limited to:

- A. Create entries and exits for the applicant
- B. Provide demographic information, if needed
- C. Document the type of disability claim
- D. Document if the applicant received benefits (income, insurance & etc.)
- E. Document the work between the SRBS and applicants

XI. Narrative Proposal

Using the RFA application, applicants must provide an overview of their project proposal and describe their proposed activities to meet all the criteria in the Scope of Grant Project, including the applicant’s statement of need, supporting data, project approach, project activities, organizational capacity, performance management, eligible population, and use of evidence-based practices.

XII. Evaluation Criteria

Applications will be scored with the following evaluation criteria

Proposed Question/Scoring Breakdown	Percent Weight	Scoring Considerations
Eligibility Criteria	N/A	<ul style="list-style-type: none"> • Does the applicant meet the minimum threshold for review such as being a 501c3 or fiscal sponsor.

		<ul style="list-style-type: none"> The cover letter addresses the organization’s background, core values, and area of expertise.
Experience or willingness to do the work	30%	<ul style="list-style-type: none"> Has the agency already done these types of services (or comparable services) before? Does the agency have a clear plan to expand services or create new services (especially if for the first time)? Does the agency’s mission match the mission and values of Leadership Council?
Experience with traditional disability or SOAR applications	10%	<ul style="list-style-type: none"> Previous experience with disability or SOAR applications
Success and challenges with traditional disability or SOAR applications	10%	<ul style="list-style-type: none"> What challenges did they identify? What was their success rate?
Integration with other systems and services	15%	<ul style="list-style-type: none"> What level of integration of systems into the homeless response system is described? What other projects are described and connected to the homeless response system?
Sustainability plan for project	10%	<ul style="list-style-type: none"> What types of grants or funding does the applicant plan to apply for? How feasible does the sustainability plan seem?
Anticipated challenges to implementation	10%	<ul style="list-style-type: none"> Has the applicant identified anticipated challenges?
Reasonable budget	15%	<ul style="list-style-type: none"> The budget makes sense for the project proposal and complies with the RFA requirements

XIII. Requested Budget

The requested budget must support this RFA and proposed project. Applicants must have a minimum salary of \$50,000 for the SBRS.

- A. Direct Client Assistance: Each FTEs will have access to a max of \$5,000 dollars annually to provide outreach supplies such as water, transportation, clothing, hygiene products, and food to people they encounter.
- B. Administrative Support: Each FTE will have access to \$8,000 annually in administrative support that can pay for technological improvements, training, staff development, and grant writing to help ensure the SRB’S funded project is sustainable far beyond the initial two-year funding period. Technological improvements must comply with the definition of “equipment” in this RFA.

Example Budget

Funding provided for Each FTE	Amount
Salary	\$ 54,100
Indirect Costs (30%)	\$ 16,230
Direct Client Assistance	\$ 5,000
Admin Support	\$ 8,000
Total	\$ 83,330

XII. Application Screening and Evaluation

A. Overview

Applications will first be screened to ensure they meet minimum qualifications, including operating under an appropriate 501c3 designation and all required RFA forms. They will then be evaluated using the evaluation criteria in Exhibit XX by a selection committee. Final selection criteria will be used to align with CoC priorities including an interview with top candidates.

B. Evaluation Criteria

Applications will be evaluated and scored in accordance with the following scoring criteria using the Evaluation Tool included in this RFA.

C. Final Selection

ECHO may apply other considerations to the final selection of awardees. These may include the following factors:

1. Number of people to receive SOAR services under this project.
2. Other factors determined relevant by ECHO.

XIII. Submission Checklist

The application and budget must be received by the deadline, or the application will be disqualified. ECHO may reach out to applicants prior to that time if an application is missing any required information, and these must still be received by the application deadline.

A. Administrative Information

1. Agency Face Sheet
2. Nonprofit Entity Attestation

B. Narrative Proposal

1. Narrative Application

C. Requested Budget (excel spreadsheet)

- 1. Requested Budget
- D. Diversity Information
 - 1. Organization Demographic Information

XIV. Inquiries and Sole Point of Contact

ECHO is serving as the point of contact for inquiries related to this RFA. All questions/inquiries regarding this RFP may be directed to RFP@austinecho.org.

XV. Schedule of Events

<u>Event</u>	<u>Date</u>
Funding Announcement Released	January 14, 2025
Deadline for Submitting Questions	January 24, 2025
Q & A Information Session Virtual	January 27, 2025, from 12 pm – 1 pm
Date Answers to Questions Posted	January 30, 2024
Deadline for Submission of Applications	February 17, 2025, 11:59 pm
Interviews with Top Candidates	Week of February 23 through March 7, 2025
Anticipated Notice of Award	March 14, 2025
Anticipated Project Start Date	April 1, 2025

ECHO reserves the right to revise this timeline as needed.