

Deadline to Submit RFP Response: April 28, 2017, 5PM EST

Final Request for Proposals:

**Institute for Veterans and Military Families (IVMF) Final Request for Proposal (RFP)
*NC Serves - Western Coordinated Network: Coordination Center Requirements &
Responsibilities***

Table of Contents

1. Timeline 2

2. Summary 2

3. Background of *NC Serves - Western* 3

4. Proposed Pilot Providers 4

5. Project Overview 6

6. Scope of Work 6

7. Preselected Technology Resource 10

8. Optional Use of Managed Healthcare Organizations (MCOs) or Regional Support Networks (RSNs)
..... 11

9. Summary of Desired Qualifications 12

10. Evaluation Criteria 12

11. Evaluation Categories 14

12. Budget and Payment Terms 15

13. Format for Proposals 15

14. Additional Required Documentation 16

15. Background of Organization 16

16. Application Process 16

1. Timeline

Activity:	Date:
Draft RFP Release	March 15, 2017
Deadline to submit questions and feedback to the Draft RFP	March 22, 2017 5PM EST
Final RFP Release	March 31, 2017
To submit questions and requests for additional information for the Final RFP, please email Ilario Pantano at igpantan@syr.edu.	April 17, 2017 5PM EST
Information Session Webinar <i>To get a seat in the webinar, where the AmericaServes team will be explaining Coordination Center Roles & Responsibilities, please email igpantan@syr.edu for more details.</i>	April 21, 2017 (Time TBD)
Application Due	April 28, 2017 5PM EST
Final award notification	May 15, 2017
Contract administration	May 15, 2017 – June 15, 2017
Contract start date	May 15, 2017

All questions and requests for additional information regarding this RFP must be communicated via email to Ilario Pantano at igpantan@syr.edu. Generally, questions will be answered on an ongoing basis and in the order in which they are received.

Information Session: The Institute for Veterans and Military Families will hold an information session with a date **April 21, 2017**. If you plan to participate in this information session, please contact Ilario Pantano at igpantan@syr.edu for more details and to RSVP.

2. Summary

The Institute for Veterans and Military Families ([IVMF](#)) at Syracuse University is transforming community-based approaches serving returning service members, veterans and their families by [building coordinated networks of care, services and resources](#) in growing markets across the United States. Such approaches empower community driven solutions that collectively ensure returning service members, veterans and their families gain access to unprecedented models of

inclusive care, resources, and services needed to sustain healthy, productive and economically stable post-service life courses following separation from the armed forces. Collective Impact initiatives are in different phases of being resourced, designed and deployed in [New York](#), [North Carolina](#), [Pennsylvania](#), [South Carolina](#), Virginia, Texas, and Washington and are working to make a meaningful difference in the quality of care, services and resources to ensure returning service members, veterans and their families are supported by qualified providers that can best help them reintegrate back into their community.

Funded in part by leading Foundations and Corporations, IVMF is tailoring and deploying innovative and impactful coordinated networks, designed to be holistic service delivery systems of care, services and resources comprised of providers from across the public, private and nonprofit sectors. Leveraging the early lessons from the Affordable Care Act, whereby care coordination models are evolving based on consumer's needs and assuming greater importance and support, IVMF is serving as a national catalyst for the development and sustainability of veteran-centric coordinated care, services and resources networks in community settings to best complement and support health and wellbeing outcomes achieved by returning service members, veterans and their families.

Emerging research highlights that the social determinants of health and well-being (e.g., sustained economic and financial stability, access to safe and affordable housing and legal resources, health care, meaningful employment and social connectedness) are more-closely correlated to improved health outcomes in populations than originally understood. Recent studies among homeless populations reveal that providing high-cost patients with supportive housing can improve their health, reduce their hospital use and reduce health care costs. Reports from the Institute of Medicine (IOM), World Health Organization (WHO), Commission on Social Determinants of Health, the Robert Wood Johnson Foundation (RWJF) and Commission to Build a Healthier America, agree that social determinants are not only contributing factors for risk and resilience for health, but also are important considerations for interventions beyond the individual to macro levels including neighborhoods, communities, and public policy. Indeed, in a recent policy change, the Obama Administration is planning to [pay doctors to coordinate the care of Medicare beneficiaries](#), amid growing evidence that patients with chronic illnesses suffer from disjointed, fragmented care.

3. Background of *NCServes – Western*

This project intends to spotlight, enhance, and strengthen existing veteran and military family statewide employment and supportive services through strategic and tailored support to local stakeholders and thought leaders from the public, private, and independent sectors. Additionally, this effort intends to make a meaningful difference in the quality of care, services, and resources for veteran and military family consumers. The precepts of this initiative include designing an improved system that coordinates services from the public, private, and independent sectors to ensure service members, veterans, and their families are better connected with services that will help them successfully reintegrate within the community.

- *NCServes – Western* is one of eleven Networks across the Country with five more scheduled to be built by end of 2017. The AmericaServes team recognizes each service region must be

uniquely designed and deployed at community levels in order for a collective impact model to be successful broadly. The AmericaServes team chose the Western region to capitalize on existing progress made in North Carolina towards better coordinating veteran services. **The Western service region consists of but is not limited to the following eleven (11) counties in the area: Buncombe, Henderson, Haywood, Rutherford, McDowell, Transylvania, Jackson, Polk, Yancey, Madison, Mitchell** (*hereafter referred to as service region*).

For the purposes of a 24-month pilot demonstration, and through coverage mapping, planning, and analysis, IVMF has identified approximately 40 service providers across the service region that adequately cover the spectrum best characterized as the leading social determinants of well-being supporting veteran and their family members’ needs (e.g., employment, education, housing, legal, healthcare, mental health, etc.). This is an adequate size and timeframe to effectively measure the Coordinated Network’s results and maximize potential. **During the Pilot Phase, the NCServes – Western Coordinated Network will develop and execute a comprehensive provider engagement strategy that onboards greater than 45 active and engaged providers. These providers will regularly make referrals in the system and play an active role in filling service gaps for veterans.**

Our Vision is Twofold: Our vision is that every veteran and their family can easily access the full range of comprehensive, networked services required to achieve their unique goals associated with individual health and wellness, and to provide a first-class service experience in order to mimic/match our military and veteran families’ first-class military service experience.

Our vision is that all public, private, and non-profit organizations and entities working together in coordinated networks serving veterans and their families are accountable to one another and embrace formalized communication, coordination, and transparency.

Mission: Our mission is to empower a coordinated network of service providers in Western North Carolina and equip them with the technological and informational resources needed to both efficiently and effectively guide veterans and their families to the most appropriate services and resources.

4. Proposed Pilot Providers

For the purpose of the pilot demonstration, IVMF will secure the commitment of a number of key veteran service providers, spanning the scope of supportive services for veterans and their families the service region. In addition to service providers, the *NCServes – Western* network will coordinate with reputable employers seeking to hire veterans and military spouses. After comprehensive mapping and qualifying, the *NCServes – Western* proposed pilot providers include:

<i>NCServes – Western</i> Proposed Pilot Providers List*		
VAYA Health	USAA	Access Family Services

NC Serves – Western Proposed Pilot Providers List*

ABCCM	US Global Leadership Coalition	Charles George VA Medical Center
USO	City of Asheville	Pisgah Legal Services
United Way	Land of Sky Regional Council	Open Doors Asheville
American Red Cross	Community Care of WNC	Asheville Chamber of Commerce
Goodwill	UNC Asheville	Peace Education Program
Veterans of Foreign Wars	Community Care of WNC	Helios Warriors
US Department of Veterans Affairs	Evolutionary Healer LLC	Asheville Local Government Office of Community Development
Rutherford County Department of Veteran Services	Corpoint	A-B Tech College
Asheville Area Habitat for Humanity	Land of Sky Regional Council	Western Piedmont Council of Governments
HAYWOOD COUNTY VETERANS SERVICES	NCWorks Career Center	MANNA Food Bank
Family Preservation Services	Military Officers Assoc of America WNC Chapter	Haywood Regional Medical Center
Homeward Bound of WNC	TroopScore	Blue Ridge Community Health Services
Buncombe County Aging Coordinating Consortium	NC Department of Commerce/ Former Offender Initiative	OnTrack Financial Western North Carolina

*This list is not exhaustive and includes the cohort of providers that have supported the strategy sessions

5. Project Overview

In order to achieve the proposed service delivery improvements, representatives from the Coordinated Network will competitively select a **NCserves – Western Coordination Center entity** to serve as the basis of support required to enhance the provision of quality services for service region’s veterans and their families. Through its offering and capabilities, the Coordination Center entity will leverage and exemplify the design principles of an effective coordinated network.

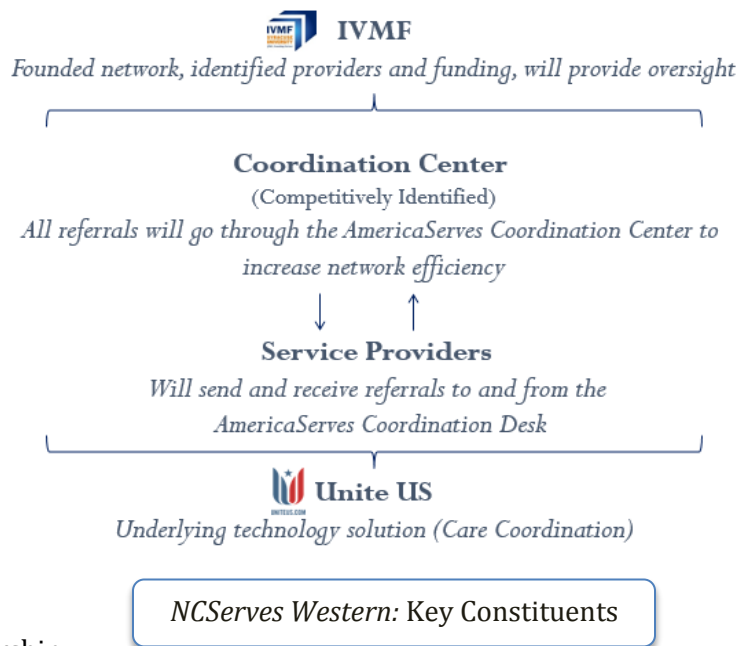
The Coordination Center works in partnership with the state, local municipalities, Veterans Affairs (VA), consumers, and providers throughout the service region to continuously improve the quality, efficiency, and accountability of Piloted veteran programs and services. It administers a managed care, services and resources system incorporating focused quality improvement services, consumer education, provider managed care coordination, services and resources analysis, technical assistance, data analysis, reporting, outreach, on-site provider trainings on operating within a Coordinated Network, and other activities in support of the Coordinated Network’s goals.

IVMF is accepting proposals to develop, deploy, and manage the NCserves – Western Coordination Center capability. This will be a concept-to-complete production. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which their proposals will be measured and assessed.

IVMF is seeking an organization, company, or individual capable of building and operating as a Coordination Center and providing outsourced solutions with the infrastructure to organize, coordinate and best meet the employment, education, housing, mental and physical health, educational, legal, financial and supportive service and benefits-related needs of veterans and their families who live and work in the service region. Organizations, companies, and individuals interested in delivering these coordinated services and resources in a network-centric environment must be able to fully-leverage [Unite US](#) as their technology solution within this award.

6. Scope of Work

The Coordination Center will understand the service offerings, capacity, and eligibility requirements of all programs and providers in the network, and will be tasked with facilitating



timely, accurate, and appropriate referrals to meet the full range of a veteran or family member’s needs. The Coordination Center is accountable for performing an in-depth needs-led intake/assessment with the veteran or service members and developing a unique service plan, coordinating and tracking the delivery of those services, and driving positive outcomes toward meeting the identified needs of service members, veterans, and their families. Most importantly, the Coordination Center will undertake every effort to rise as the local leader of service coordination and military and service members’ support in the community, and will participate as a key component of the nationwide AmericaServes Network, standing for its values, mission and vision. The main responsibilities of the Coordination Center are delegated into four functional areas: *Network Provider Integration, Network Development, Veteran Consumer Affairs, and Technical Administrative.*

Functional Area	Responsibilities:
<p>Network Provider Integration: Utilize expertise to deliver a managed care system that ensures appropriate access, utilization, and effectiveness</p>	<ul style="list-style-type: none"> • Leverage each Network Provider’s strengths and assets to promote teamwork and partnerships among providers to improve the quality of care and outcomes for veterans and their families • Support Network Providers through the change process required in order to adopt the Network’s approach to care coordination. Work closely with Network Providers’ case managers to ensure that they are trained on the functions of the Network and its platform • Take findings from the needs-led intake/assessment with each veteran or family member to determine their needs and develop a customized plan to meet needs • Take information from provider’s intake/assessment to identify and make real-time referrals, real-time referrals based on the veteran’s needs, location, criticality, eligibility criteria, and existing provider partnerships • Ensure the fewest number of “handoffs” between providers as possible, employ the minimal number of service providers necessary to serve the range of veteran’s needs, and balance the referrals throughout the network to ensure equity
<p>Network Development: Implement and test process modifications and improvements. Record and enforce onboarding criteria for Network Providers. Increase awareness about Network in the community</p>	<ul style="list-style-type: none"> • Develop and action a comprehensive provider engagement strategy that will attract over 45 active and participating providers by the end of the 24-month pilot demonstration • Participate in outreach events, conduct one-on-ones with providers, increase awareness and recognition of <i>NCServes – Western</i> • Ensure Network Provider engagement through continuous communications, outreach, and support as required • Develop and maintain provider qualifications, track and maintain current, in-depth understanding of network capabilities and program eligibility criteria • Develop and deliver orientation program training (on the principles of the Network Procedural Guide) for service providers onboarding into the network • Systematically integrate procedural enhancements and improvements • Work with Technology Provider to deliver technical platform training and refreshers as required

	<ul style="list-style-type: none"> • Support AmericaServes growth in other regions by attending and participating in the facilitation of socialization and planning events as deemed appropriate by IVMF • Share best practices with other AmericaServes communities and support the expansion and scaling of AmericaServes as a leader
<p>Veteran Consumer Affairs: Integrate assessment tools to solicit feedback from veterans and military families. Use results to identify service gaps and recommendations to integrate or modify services</p>	<ul style="list-style-type: none"> • Systematically track each veteran or family member through their service lifecycle • Capture balanced feedback from veteran and provider • Provide appropriate user and client level details to IVMF to administer surveys • Categorize and report on recommendations for Coordinated Network improvement • Provide biweekly report to IVMF including overview of Network performance and trends • Prepare and present quarterly In-Progress Report (IPR) to Network stakeholders
<p>Technical and Administrative: Facilitate process control, program management, and communication to Network Providers</p>	<ul style="list-style-type: none"> • Initiate and maintain communication with service providers toward making accurate, timely referrals and tracking the progress of service delivery • Enforce the network policy and procedures; hold service providers accountable for driving positive outcomes toward meeting each of the veteran or family member’s identified needs • Modify existing processes as needed based on veteran and provider feedback as well as Measurement and Evaluation findings and recommendation by IVMF • Document and publish process modifications

Applicants can consider the following **project phases and deliverables** for the *NCServes – Western* Coordination Center. The timelines and tasks included are suggestions; applicants are encouraged to provide additional recommendations within their proposal response.

Phase	Tasks & Deliverables
<p>Network Mobilization and Planning</p>	<p><i>Timeline: April 2017 (1 month)</i></p> <ul style="list-style-type: none"> • Staff the Coordination Center • Collect and organize Network Provider eligibility criteria and intake forms, and detailed information about the services they provide and the regions they cover • Establish teaming protocol with Unite US; coordinate for regular check-ins • Report progress on assigned deliverables to IVMF and communicate any concerns or issues; coordinate for regular check-ins and reports as required by IVMF • Interface with service providers at events and communication points defined in the project plan • Coordinate and integrate marketing and branding recommendations from IVMF and the Marketing and Branding team • Develop orientation program training for Network Providers

	<ul style="list-style-type: none"> • Interface with Unite US toward updating eligibility requirements/services for each provider to the network software • Study/gain familiarity with each service provider’s eligibility criteria and service offerings • Develop and publish process and protocol for receiving self-referrals from veterans and vetting referrals to providers • Receive training from Unite US on utilizing the network software; maintain thorough understanding of the software functionality and the ability to guide others through the basic software functions and specific end-to-end processes (e.g., creating a referral) • Develop interim transition plan to establish the Coordination Center and integrate Network Providers and also define breakdown of quarterly quantitative goals
<p>Steady State Operations (Go-Live)</p>	<p><i>Timeline: May 2017 – May 2019 (24 months)</i></p> <ul style="list-style-type: none"> • Plan and allocate distribution of veteran/family cases within the Coordination Center team • Provide continuous training and refreshers to the Coordination Center team to perform needs-led assessment and develop service plans; review and approve service plans developed by Coordination Center team • Design communications with service providers toward enforcing the policy and procedures (e.g., emails and phone scripts for following up on referrals at various points in the case lifecycle, for collecting regular capacity updates) • Conduct outreach with providers and participate in community events to increase awareness about <i>NCServes – Western</i> in the community • Identify and promote opportunities to coordinate with Network Providers and community leaders on the <i>NCServes – Western</i> Network • Routinely communicate with partner AmericaServes networks to brainstorm, improve, and enhance operations, in person and via email communications such as frequent newsletters • Represent AmericaServes in socialization and planning events as requested by IVMF and share learnings and insights with potential and existing Network communities as part of a Community of Practice • Interface with Measurement and Evaluation Team, Marketing and Branding Team when required • Coordinate with preselected Cultural Preparedness Certifying Trainer to developed training plan and certify Network Providers • Interface with Unite US to implement and test process modifications and improvements • Deliver orientation program training to service providers onboarding into the network and/or train Coordination Center team to deliver training • Prepare requested materials for periodic (e.g., quarterly) audits of the Coordination Center • Represent the Coordination Center to network stakeholders and beyond • Perform needs-led assessment of veteran or family member cases referred into the network, develop service plan toward meeting those needs • Make accurate, appropriate referrals by referencing eligibility criteria, location, capacity, and services provided by each provider in the network

	<ul style="list-style-type: none"> • Demonstrate adaptability to receive direct referrals from veterans and processing veteran case files received directly from providers • Routinely communicate with service providers regarding the status of veteran/family member cases that Coordination Center Director member is responsible for tracking • Maintain phone and email presence, giving incoming calls and emails from service providers priority throughout the business day • Enforce policy and procedures by sending proactive and reactive communications/requests to service providers via phone and email • Execute any Measurement and Evaluation directives as required • Carry out process improvements and modifications as approved and/or directed • Provide qualitative and quantitative report and analysis as required by IVMF and participate in frequent check-in calls • Develop blog entries to be publish on Network website and other relevant outlets as requested by IVMF • Communicate recommendations and suggestion from the Coordination Center or Network Providers to improve the technical platform to Unite Us and IVMF teams • Participate in AmericaServes nationwide community of practice as a thought leader and contributor
--	--

7. Preselected Technology Resource

The Coordination Center may supplement the Coordinated Network with preexisting internal solutions; however, the Coordination Center must fully leverage the preferred and preselected technology solution to coordinate and support identified service providers and veteran consumers across the service region. IVMF has preselected **Unite US** as the digital platform for the Coordination Center to leverage and coordinate activities within the Coordinated Network. The Coordination Center may coordinate with Unite US around additional enhancements if appropriate, obtaining data and other technology related issues. Unite US is a technology company delivering software solutions for human services, allowing the Coordination Center, and all Network Providers to coordinate services. We recommend your organization familiarize itself with the Unite US platform prior to RFP response.

Throughout the course of the pilot, Unite US will assist the Coordination Center and the Network to ensure that all available aspects of the software platform are utilized to the maximum extent. Unite US will also work with the Coordination Center to streamline Network operations, efficiency, and communications across the Network. To that extent, when necessary, Unite US will assist the Coordination Center in the following ways:

1. Communication with providers to facilitate data entry, increase engagement, and promote technology use

2. Operational support either on-site or remote, to assist in the growth and sustainability of the Network
3. Data gathering and insights to facilitate Network development and improve efficiency

8. Optional Use of Managed Healthcare Organizations (MCOs) or Regional Support Networks (RSNs)

The Coordination Center may supplement the Coordinated Network with preexisting internal solutions; however, the Coordination Center may alternatively leverage external Managed Healthcare Organizations (MCOs) or Regional Support Networks (RSNs) of sufficient scale and quality for Network intake, referral and coordination efforts. Deemed a “back of house” alternative, such MCOs (or RSNs) can be utilized as a subcontractor to provide a call center method of in-taking of referrals. Said MCO/RSN can provide two (2) FTE, Bachelor Degree level social workers to act as case managers within the network. This model also takes into account the utilization of existing MCO/RSN resources as follows:

1. Existing managerial resources which will provide the clinical oversight to the coordination team
2. Existing Qualified Professional resources (two at .5 FTE), totaling 3 Qualified Professional FTEs to manage the call center coordination functions
3. Partnering with the Coordination Center to coordinate behavioral health referrals with local management entities (LMEs) and Managed Care Organizations (MCOs) in the region

If interested in leveraging this approach into the proposal response, the IVMF can facilitate introductions to a MCO.

9. Summary of Desired Qualifications

Eligible applicants must demonstrate an existing capability to coordinate services, resources, and care from multiple domains. Applicants should have experience providing services to veterans, service members, and/or military families.

Knowledge

- Familiarity with key characteristics of veteran and military family services and resources
- Demonstrated understanding of the existing evidence base practices and key features of effectively serving veterans and military families
- Familiarity with emerging coordinated care models in health care

Experience

- Experience working closely and collaboratively with providers, technology platforms, and funders
- Capability to articulate the value of coordinating services resources and care to C-Suite, Program Directors, and Program Managers
- Experienced staff and/or Licensed Clinical Social Workers with acute understanding of the veteran services landscape
- Demonstrated proficiency conducting intake and prioritizing consumer needs
- Excellent working relationships with both healthcare and human service providers

Other Desired Qualifications

- Articulate a clear and compelling strategy to onboard and retain active Network Providers. The data should inform the engagement strategy and include a workplan that supports continuous communication and reinforcing activities with Network providers. The successful respondent should articulate measures of success to track the performance of the Network Provider engagement strategy.
- Demonstrated leader in the community with capability to train, educate, and inform other communities across the country
- Comprehensive understanding of the resources and services available to veterans, service members and military families in the Western NC service coverage region
- Effective communication and problem solving skills, and planning experience with various social service agencies
- Effective presentation skills and ability to communicate learnings and train other communities in the AmericaServes Coordinated Network

10. Evaluation Criteria

This section will serve as the opportunity for the applicant, by responding to the questions below, to convey their vision and structure for operating as the Coordination Center within the

Coordinated Network. The following (generally) represent the basis for evaluating the efficacy of proposals in response to the RFP:

Understanding of the Scope of Work (30 points)

- Approach to the project tasks, including explanations and rationales for any suggested modifications
- Understanding of issues specific to the veteran and military family population
- Identification of anticipated logistical challenges and a sufficiently-detailed description of how challenges will be addressed or minimized
- Ability to partner with a network of providers from all healthcare and human service domains
- Comprehensive outreach and engagement strategy to promote *NCServes – Western* to Western North Carolina’s providers, consumers, and community
- Experience with both prevention and crisis based intervention services
- Comprehensive articulation of how the entity plans to engage over 40 active providers

Technical Approach (20 points)

- Logical and clear conceptual framework that address the comprehensive nature of the project
- Approach to coordination and teaming with Unite US, including explanations and rationales for any suggested modifications
- Proposed methodology for tracking, monitoring and referring Network Providers
- Strategies for working with other *AmericaServes* Coordination Centers, providers, Unite US, and other identified stakeholders

Organizational Experience (30 points)

- Succinct organizational overview articulating similar successful projects
- Outline your contribution and engagement in the *NCServes – Western* initiative
- A staffing model that demonstrates experience and qualifications that clearly reflect the range and depth of the requirements outlined in this RFP
- Experience in this area of North Carolina – particularly the service region comprised of the following counties: Buncombe, Henderson, Haywood, Rutherford, McDowell, Transylvania, Jackson, Polk, Yancey, Madison, Mitchell
- Experience with client and partners’/provider confidentiality
- Resume of key personal to support the project (separate attachment, not included in overall page count)

Budget (10 points)

- Tasks assigned to appropriate personnel so as to minimize the cost per deliverable while also maximizing the quality of the output (as explained in the budget narrative)
- A reasonable price per task

- Allocate portion of budget for ad hoc travel to other communities as part of establishing the Coordination Center as the local leader in service coordination, and to share learnings and provide guidance to potential and existing AmericaServes communities
- **Project total budget that does not exceed \$450,000 for a period of 24 months** (should the Coordination Center choose to leverage an MCO's support, the respondent will propose a reasonable allocation of funding amongst the prime entity and the MCO. IVMF will make final determination on fund allocation).

Project Management (10 points)

- A logical work plan and timeline that demonstrates how the project will be completed successfully within the project period
- Evidence of the ability to have a sufficient, skilled, and competent staff available to lead this project and accomplish the work
- Demonstrated procedures for maintaining quality control and timeliness and conducting regular reviews of the quality of data collected
- Methodology for leveraging partner networks (e.g., *NYServes*, *PAServes*, *NCServes* and *SCServes*) to learn, improve, and advance *NCServes - Western*
- Evidence of the ability to establish the *NCServes - Western* Coordination Center as a separate and distinct offering within one's organization

11. Evaluation Categories

IVMF and a predetermined panel of industry stakeholders will evaluate proposals using the point system described below:

Coordination Center Evaluation Categories	Maximum Points
Understanding of the Scope of Work	30
Technical Approach	20
Organizational Experience	30
Budget	10
Project Management	10
Total	100

IVMF is committed to a fair and transparent proposal review process. Project applications will be reviewed and scored by a panel comprised of expert reviewers from IVMF, select project advisors, funders, and researchers, who possess an intimate knowledge of Coordinated Network operations and activities. The review panel will consider the following factors in assessing the overall:

- Clear articulation of need and a focus on the service region's public and private service providers serving service members, veterans, and their families.
- Likelihood that a project will accomplish its goals and have a measurable impact.
- The experience, potential, and readiness of the applicant organization to complete the project successfully.
- Degree of creativity or innovation exhibited by the project.

- Clarity of the proposal in making the case that the initiative represents a special opportunity for service region Veteran Service providers, veterans and their families.
- Cost proposal that effectively and efficiently encompasses the scope of the project.

12. Budget and Payment Terms

Please scope the budget narrative for 24 months, with the project to commence on May 15, 2017 and span until May 15, 2019. **The total budget should not exceed \$450,000 for the duration of the project.** As part of your response, complete the line item budget narrative form included in Section 14 of this RFP. The funding disbursements for the vendor will occur in phases. In addition to invoices, the vendor will also be required to submit a report on progress and accomplishments against defined goals and measures. There will be a checkpoint at approximately halfway through the scope of work, at which IVMF reserves the right to de-scope or terminate the selected vendor.

Requests not eligible for funding include:

- Core support/organizational infrastructure. Core support includes baseline operating and administrative costs separate and distinct from the project, board development, staff development unrelated to the project, and fundraising activities
- Projects that focus on lobbying or political activities
- Capital expenses

The selected applicant will enter into a cost reimbursable agreement with Syracuse University's Office of Sponsored Programs (OSP). Costs will be reimbursed in accordance with the defined terms of the agreement. Reimbursement shall be made by SU upon receipt of itemized invoices and progress report and/or final report prepared in accordance with the statement of work. Any changes in the approved budget shall require prior approval of SU's OSP.

IVMF will negotiate contract terms upon selection. All contracts are subject to review by Syracuse University's OSP and Office of Sponsored Accounting (OSA), and the project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget, and other necessary items.

13. Format for Proposals

The application is limited to 12 pages of narrative. Required ancillary documentation does not count towards your page limitation. All applications must be completed with one-inch margins, single-spaced and with 12-point font. After application submission, IVMF may request additional information and responses, or may engage in discussion and negotiation with applicants.

14. Additional Required Documentation

Additional Required Documentation	
<p>In addition to the writing narrative, please attach the following documents to the email with the completed proposal submission. Please note that these documents do not count towards your total page count (12 pages):</p>	
<p><input checked="" type="checkbox"/> Program Budget (Please complete using the template below)</p> <p><input checked="" type="checkbox"/> Statement of Work/Timeline (Please complete using the template below)</p> <p><input checked="" type="checkbox"/> Key Staff List (Please complete using the template below)</p> <p><input type="checkbox"/> Resumes of Key Staff supporting project</p>	<p><input checked="" type="checkbox"/> Sub recipient Profile (Please complete using the template below; must be signed by authorized official)</p> <p><input type="checkbox"/> As Applicable:</p> <ul style="list-style-type: none"> • A-133 Audit – most current available • Audited Financial Statement – most current available • Federally Negotiated Rate Agreement Letter • IRS 501c (3) determination letter (if applicable) <p><input type="checkbox"/> Annual Report (if available)</p> <p><input type="checkbox"/> Current Org Chart</p>

15. Background of Organization

As the first institute of its kind in the nation, the IVMF leverages the intellectual, programmatic, and human capital resources of higher education in support of the post-service life course of the nation’s veterans and military families. The IVMF focuses on developing impactful programming, cultivating actionable research, conducting policy analysis and providing technical assistance positioned to address the social, economic and public policy challenges facing the veterans’ community. The IVMF team approaches this mission as a collaboration, forging enduring partnerships with government, private industry, institutions of higher education, philanthropic organizations and stakeholders committed to supporting transitioning service members, veterans and their families.

16. Application Process

Programmatic, submission process and general questions should be forwarded to Ilario Pantano at igpantan@syr.edu. Note: questions and answers from interested applicants may be provided to all applicants. All applications should be consolidated, with RFP response and additional required attachments submitted simultaneously via email to igpantan@syr.edu. Applications *may not* be delivered by mail. No phone call inquiries will be accepted.