



Thome Aging Well Program: Scaling What’s Working

2022 Request for Proposals

A grant opportunity for nonprofit affordable housing owners and/or operators, housing authorities, or tribal designated housing entities serving older adults with low incomes in Michigan and Maryland looking to scale proven services and supports

Important Dates

Request for Proposal Release	March 31, 2022
Informational Webinar	April 19, 2022, 3 – 4pm ET
Virtual Office Hours	April 26, 2022, 2 – 3pm ET May 11, 2022, 11 am – 12 pm ET.
Submission Deadline for Proposals	May 16, 2022, by 11:59 pm ET
Q&A Period (if needed)	June 15 – 22, 2022
Notice of Awards	June 30, 2022

Overview of Opportunity:

This grant opportunity is available to nonprofit housing organizations serving older adults with low incomes residing in Michigan and Maryland. Grants may be used to scale housing-based services and supports that have proven successful in improving the health and well-being of these individuals. Stable healthy housing connected to services offers older adults the opportunity to age with dignity at home by supporting their physical, mental, and financial health. This grant opportunity will allow more older adults to access the housing-based services they need to thrive.

This grant opportunity is a part of Enterprise Community Partners’ (Enterprise) Thome Aging Well Program funded by the Edward N. and Della L. Thome Memorial Foundation and administered through Bank of America.

Purpose:

The purpose of this award is to scale proven housing-based services and supports that enable low-income older adults living in Michigan and Maryland to age in place.

Award Amount:

\$150,000 - \$300,000 with an average award size of \$250,000

A total of up to \$4,000,000 will be awarded to non-profit affordable housing owners and operators, housing authorities, or tribal designated housing entities serving residents aged 55 or older residing in the states of Michigan and Maryland. Awards will be distributed to organizations in both Maryland and Michigan; organizations will be selected based on the strength of the application without limitations on the number of grantees per state.

Period of Performance:

Grants funded through this program will have a duration of up to 24 months. Grants will start on the date the agreement is executed by both parties, but no earlier than July 1, 2022. Enterprise will work closely with all organizations recommended for an award to determine an appropriate period of performance based on proposed activities, award size, and other factors, as applicable.

How to Apply:

Applicants must apply through SlideRoom, the submission portal for this funding opportunity. No exceptions will be made.

- Apply here: [Application Link](#)
- If you need to, register for a SlideRoom account [here](#)

Deadline to apply is 11:59 pm Eastern Time (ET) on May 16, 2022.

Questions

General questions may be submitted to AgingWell@enterprisecommunity.org until 3 p.m. ET Monday, May 16, 2022. Questions received after this time and date will not be answered. Enterprise highly recommends proposals be submitted in advance of the deadline.

Webinar:

Enterprise will host a webinar on the date shown below. During this session, Enterprise staff will review the requirements of the grant opportunity and answer questions from potential applicants.

Date and time: April 19, 2022, 3 – 4 pm ET

Registration linked [here](#)

To request a copy of the webinar recording after the session, please e-mail AgingWell@enterprisecommunity.org.

Office Hours:

Enterprise will host two 1-hour office hour sessions for potential applicants. During these sessions, an Enterprise representative will be available to interested applicants who join to ask clarifying questions around the grant opportunity. Enterprise will not provide personalized support to applicants in building their applications. These sessions will be held on April 26, 2 – 3pm ET and May 11 from 11 am – 12 pm ET. Please register via the following links:

[April 26, 2-3 pm ET Q&A Session](#)

[May 11, 11 am – 12pm ET, Q&A Session](#)

About Enterprise:

The mission of Enterprise is to make home and community places of pride, power and belonging, and platforms for resilience and upward mobility for all. Enterprise is the only national nonprofit that addresses America's affordable housing crisis from every angle, combining 40 years of experience,

thousands of local partners and the expertise of over 1,100 employees nationwide. We bring together nationwide know-how, policy leadership, partners, donors and investors to multiply the impact of local affordable housing development.

About the Thome Aging Well Program

As part of Enterprise's mission, we launched the Thome Aging Well Program at the start of 2022. Over the next four years, the Program will improve the health and well-being of low-income older adults by supporting organizations dedicated to:

- Helping these individuals age with dignity at home
- Incubating new and innovative programs
- Sharing knowledge across a rich partner network

The Program will prioritize organizations serving communities or groups that have and are continuing to experience persistent health inequities. The Program will include two phases—Scale What's Working and Incubate New Ideas. The Scale What's Working phase, which is the focus of this RFP, will scale efforts with proven results, while the Incubate New Ideas phase will foster innovative approaches to the structural barriers that hinder the ability of older adults to age with dignity at home.

The Aging Well Program was developed and is managed by Enterprise Community Partners and funded by the Edward N. & Della L. Thome Memorial Foundation and administered through Bank of America.

Scale What's Working Grants

The first phase of the Thome Aging Well Program will work with community partners to scale what's working in their support of the health and well-being of older adults. The first round of Scale What's Working grant awards, the focus of this RFP, will provide funding to non-profit owners and/or operators of affordable housing, housing authorities, or tribal designated housing entities serving residents aged 55 or older. A second round of Scale What's Working grants will be awarded in early 2023 and will be open to a broader range of community-based organizations providing a full range of services to support the ability of older adults with low incomes to age with dignity in their homes.

All grantees in the Scale What's Working phase of the program will receive a monetary award to scale proven housing-based service programs, access to a learning collaborative and peer network, evaluation support, and the opportunity to connect with additional funders in the space. The award is inclusive of the following:

- **Award:** \$150,000 - \$300,000, with an average grant of \$250,000. Up to \$4 million will be awarded in this first grant round of Scale What's Working grants.
- **Learning Collaborative:** All grantees are expected to participate in a multi-year learning collaborative comprised of other grantees from their state. The curriculum for the learning collaborative will focus on improving health equity, promoting collective problem-solving and knowledge-sharing based on the specific needs of the group. The learning collaborative will meet quarterly starting in 2023 and run through mid-2025. One collaborative meeting will be in person every year; all others will be virtual.
- **Evaluation Support:** All grantees will receive up to 15 hours of optional in-kind technical assistance from a third-party evaluator to support their specific evaluation needs as they

seek to further evaluate and communicate their programmatic outcomes. The technical assistance will be shaped to the expressed needs of the grantees and may include articulating a theory of change, designing data collection approaches, developing survey questions, or communicating evaluation findings to target stakeholders.

- **Funders Convening:** Grantees will be offered the opportunity to attend a funders convening to network with funders in the field, share their story, and make the case for continued support of their work.

Eligible Applicants

- Organizations that:
 - Are non-profit owners and/or operators of affordable housing or housing authorities or tribal designated housing entities AND
 - Serve low-income older adults (55 or older) residing in Michigan or Maryland AND
 - Provide direct services or directly contract with service providers who provide direct services to low-income older adults in **a housing-setting** to support their physical, mental and/or financial health and well-being.
- A consortium of organizations that:
 - Consists of one or more non-profit affordable housing owners and/or operators or housing authorities or tribal designated housing entity and one or more other supporting organizations such as direct service providers, health care organizations, or mental health providers AND
 - Serve low-income older adults residing in Michigan or Maryland AND
 - Provides services or supports to low-income older adults in **a housing-setting** to support their physical, mental or financial health and/or well-being.

If a consortium of organizations (e.g., a non-profit affordable housing organization, a hospital system, and mental health provider) chooses to apply, the applicant organization representing the consortium must be a non-profit affordable housing owner or operator, a housing authority, or a tribal designated housing entity and meet all other eligibility requirements.

Questions about your eligibility can be submitted to AgingWell@enterprisecommunity.org.

Eligible Programs

Programs are eligible for funding through this grant opportunity if they meet the following criteria for program focus, populations served, program delivery, and scaling type.

Program Focus: Programs must provide services that address at least one of the health focus areas listed below; ideally programs will address multiple focus areas. “Services” is defined as activities or programming that supports the physical, mental, or financial health and well-being of older adults living in affordable housing or the surrounding community. The focus areas of this grant program include:

- The **physical health** of older adults includes their physical ability to perform daily activities, manage chronic conditions, achieve proper nutrition, limit drug and alcohol use, sleep, and be active.

- The **mental health** and well-being of older adults, includes the promotion of psychological, emotional, and social well-being. This is inclusive of social connectedness, self-esteem, stress management, and management of mental disorders or early warning signs.
- The **financial well-being** of older adults includes the ability to maintain financial stability, including increasing their financial security, connection to benefits, workforce training, or financial planning and education.

Populations Served: Programs supported by this funding opportunity must serve adults who are 55 or older and have low incomes (defined as 80% of Area Median Income (AMI) or below) who live in Michigan or Maryland. Preference will be given to programs serving those who belong to a community or group that has and is continuing to experience persistent health inequities (e.g., BIPOC, extremely low incomes, persons with disabilities, and LGBTQ+).

Program Delivery: To be eligible for this grant, the new or expanded program must begin serving the proposed population within 6 months of the start of the grant period of performance.

Scaling Type: Eligible programs will be those that fall into one of the two categories described in the table below, related to the type of scaling proposed and the level of evidence available to demonstrate proven effectiveness.

Scaling Type	Required Evidence Base
<p>(A) Expansion of an Existing Program: The expansion of an existing services program already in operation by the applicant organization. This expansion may include bringing services offered in your portfolio to additional properties within that portfolio, expanding who your services program supports (e.g., expanding to serve community members), or adding new or a higher-level of services to an existing services program to increase support to all residents or to a specific higher needs population (e.g., older adults aging within a family property).</p> <p><i>Examples: An affordable housing operator currently offers a proven program for chronic disease management to their residents. The grant will be used to scale the program to low-income older adults in the surrounding community.</i></p> <p><i>An affordable housing owner has evidence that a meditation and mindfulness program offered in one of their properties has markedly improved the mental health of residents based on resident feedback and program participation and retention rates. The grant will be used to scale this program across 10 additional properties in the portfolio.</i></p>	<p>The organization has knowledge of the human impact of the proposed program through on-the-ground experience and program documentation. This evidence should include:</p> <p style="padding-left: 40px;">1. Case studies or program participant / staff narratives / testimonials that illustrate program impact on the lives the participants served.</p> <p style="text-align: center;">AND</p> <p style="padding-left: 40px;">2a. Outcome data to illustrate program effectiveness. <i>Outcome data examples include resident self-reported physical or mental health status, activity levels, consumption of healthy foods, access to primary care, etc.</i></p> <p style="text-align: center;">OR</p> <p style="padding-left: 40px;">2b. Program performance data (e.g., tracking program outputs). <i>Performance data examples include frequency and type of services delivered, people served, program attendance, etc.</i></p>

<p>(B) Introducing A Proven Model: The introduction of a proven support or resident services model (e.g., SASH or PACE) that has not yet been implemented by the applicant organization.</p> <p><i>Examples: An affordable housing owner has a number of residents experiencing varying levels of cognitive decline. The grant will support an existing partnership among the housing owner, a local hospital and three service providers to deliver comprehensive mental health supports onsite to residents.</i></p> <p><i>A public housing authority has identified the need for onsite health services. This grant will be used to train 8 community members to serve as Community Health Workers who will then provide support to their aging residents.</i></p>	<p>The proposed model/program has been successfully implemented in many housing settings and is based on best practices. There are white-papers, outcomes evaluations, and/or scientific literature illustrating the health (physical, mental or financial) impact of the program or the program elements.</p>
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In developing this grant program, Enterprise acknowledges the evidence base around proven supports for older adults is constantly evolving, and it is not always feasible at the community level to gather the outcome data necessary for publication in peer-reviewed journals. Thus, the success of many programs may not have been shared through the academic literature and may not be included in the existing evidence base. We do not want this to be a barrier for scaling good programs that work. As a result, the above eligible program options allow a variety of evidence to illustrate program success.

Eligible Expenses

The grant dollars must be used to directly serve low-income populations (defined as 80% Area Median Income or below), particularly those who have and are continuing to experience health inequities, who are aged 55 or older, and who reside in Michigan or Maryland. Specifically, grant funds may be used for activities which include, but are not limited to:

- Staff time associated with program delivery, including the hiring of necessary staff and contractors/consultants. For example, the hiring of a Resident Services Coordinator, Care Coordinator or similar.
- Hiring contractors or consultants to support program development or delivery. Contractors/consultants can include external project partners collaborating with the lead organization to deliver the program.
- Travel expenses directly related to the delivery of program activities and those related to participation in the Thome Aging Well Learning Collaborative and Funders Convening. Grantees are expected to build in travel costs for at least one staff member to participate in the annual in-person learning collaborative meetings (two in-person meetings are likely to occur within the period of performance for this grant) and one funders convening. For the purposes of developing their budgets, applicants should assume that the in-person meetings of the Learning Collaborative for Michigan grantees will be held in Detroit and the in-person

meetings of the Learning Collaborative for Maryland grantees will be held in Baltimore. Applicants should assume that the funders convening will be held in Baltimore, Maryland.

- Technology hardware, software and equipment.
- Limited adaptations of physical space within a property to allow for program delivery. Funds to support structural improvements that support your program's ability to scale should be limited to no more than 25% of your total budget.
- Professional development and training for staff and/or residents to support program goals, program delivery, or intended outcomes, including costs to attain additional certifications (e.g., CORES, CARES Dementia Certification).
- Program supplies, materials, and other costs including program resident incentives.
- Indirect costs. Indirect costs should not exceed the approved organization indirect rate for your organization. If your organization does not have an indirect rate, indirect costs should not exceed 10%.

Grant funds **may not** be used to cover the following costs:

- Ongoing business expenses or organization costs defined as rent, telephone bills, insurance, etc.
- Substantial construction costs.
- Fundraising activities.
- Dues for lobbying activities.
- Bad debts.
- Contributions and donations.
- Policy or advocacy costs intended to influence legislation.
- Fines, penalties, and judgments.
- Interest and other financing costs.
- Investment costs.
- Capital expenditures or land acquisition.
- Costs of idle facilities.
- Housing & personal living expenses.
- Contingency reserves.
- Other costs pursuant to program or regulatory requirements

Grant Disbursement & Reporting

Grantees will receive half of the grant amount at the start of the period of performance and the second half at the mid-point of the period of performance. As part of their grant agreement, they will be expected to:

- Execute the proposed program.
- Provide an annual report to Enterprise detailing progress, successes, limitations, and basic output and outcome reporting, including the type of services delivered and number of older adults served. Additional guidance on the content of the annual report will be developed with Enterprise's local Program Director.
- Participate in quarterly check-ins with Enterprise's local Program Director for the period of performance for the grant.

- Participate in all meetings, to the greatest extent possible, of the learning collaborative through at least the end of the period of performance for this grant.
- Contribute to Enterprise's efforts to assess key outputs or outcomes for this funding opportunity (e.g., number of people served, influence of the grant on scaling, ability to secure sustainable funding) and to gather lessons learned to inform the field and future programming. This may include sharing limited output or outcome data with Enterprise or participating in surveys or a focus group to further reflect on aspects of your program implementation (e.g., grantee's experiences, lessons learned, successes and limitations). Such engagement may be conducted by Enterprise staff or by a third-party evaluation consultant.

Application Process and Overview

Applicants must apply through SlideRoom, the submission portal for this funding opportunity. No exceptions will be made.

- Apply here: [Application Link](#)
- If you need to, register for a SlideRoom account [here](#)

Deadline to apply is 11:59 pm ET on May 16, 2022.

Enterprise's goal for this application is to ask straightforward questions that will be assessed based on the categories and points indicated. After reviewing and scoring all applications we will have a period of electronic Q&A to gather any additional clarifications or information needed to make the final selection.

The narrative portion of the proposal requires responses to questions in the following categories. See Appendix A for a copy of the application questions. The point value for each category is included below, out of a total of 100 possible points. Points will be determined based on alignment with the program goals and requirements as outlined throughout this RFP. The points assigned to each application section is detailed below.

- I. Organizational Information
- II. Program Overview (25 points)
- III. Population Served (25 points)
- IV. Program Impact (25 points)
- V. Core Values (15 points)
- VI. Budget (10 points)

Application Attachments:

All attachments detailed below are required unless otherwise stated.

- Budget attachments
 - Budget template
 - Documentation of Indirect Rates – if including indirect costs in the budget proposal, please submit documentation of your organization's approved indirect rate or explanation of the indirect costs.
- Evidence-base attachments

- Up to three attachments can be shared to support your application in illustrating the impact and effectiveness of your proposed program. Attachments may include internal or external reports on program performance, published articles, up to 5-minute audio or video attachment, or other attachments that illustrate the evidence-base for your proposed program. Additional details are provided in the “Eligible Programs” section of the application under the “Scaling Type” subheading.
- Financial and organizational attachments to illustrate eligibility
 - 501c3 Letter of Determination – applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For housing authorities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.
 - Audited Financial Statements – applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.
 - Certificate of good standing – applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing with the state will not be considered.
 - IRS W-9 – Must be completed and signed.

Completed applications submitted by the May 16th deadline will be reviewed by Enterprise staff from across the organization. All proposals must meet the eligibility requirements and align with program areas and definitions, or they will not be considered.

Steps for Application Submission

- 1) **Assess eligibility** through reviewing application eligibility requirements and program areas and definitions.
- 2) **Create a SlideRoom Account**
 - a. Register for a free SlideRoom account under your organization’s name: <https://enterprise.slideroom.com/#/Login>
 - i. Ex. ABC Foundation, not Mary Smith.
 - b. Start application in SlideRoom - [Application Link](#)
 - c. Preview all proposal questions once logged in to adequately prepare for proposal submission and gather required documents and attachments.
 - d. Technical issues with SlideRoom can be sent to support@slideroom.com or by accessing the online help desk: <https://support.slideroom.com/>. SlideRoom support can take up to 24 hours; for this reason, we encourage applicants to apply and submit their applications early.
- 3) **Review the Application and Required Budget Template**
 - a. Download the budget template
 - b. Read the entire application and required budget template to understand submission details and requirements.
 - c. Applicants are required to complete and upload the budget template (see 3(a)) provided by Enterprise as part of their SlideRoom proposal submission.
- 4) **Complete and Compile Required Attachments**

- a. **Budget Template**
 - b. **Documentation of Indirect Rates** – if including indirect costs in the budget proposal, please submit documentation of your organization’s approved indirect rate or explanation of the indirect costs.
 - c. **Evidence-base attachments** – up to three attachments can be shared to illustrate the impact and effectiveness of your proposed program. Attachments may include internal or external reports on program performance, published articles, up to 5-minute audio or video attachment, or other attachments that illustrate the evidence-base for your proposed program. Additional details are provided in the “Eligible Programs” section of the application under the “Scaling Type” subheading.
 - d. **501c3 Letter of Determination** – applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For housing authorities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.
 - e. **Audited Financial Statements** – applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.
 - f. **Certificate of Good Standing** – applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing with the state will not be considered.
 - g. **IRS W-9** – Must be completed and signed.
- 5) **Prepare & Submit** proposal in SlideRoom
- a. Answer all questions in SlideRoom.
 - b. Upload all required templates and attachments.
 - c. Carefully review responses before submitting.
 - d. Applicants will not be able to make edits once the proposal is submitted.
 - e. Submit proposal prior to deadline to allow for time to address any potential issues.
 - f. Proposals must be submitted in SlideRoom by 11:59 pm EDT on May 16, 2022.
 - g. After submission, SlideRoom will provide applicants with a clear confirmation message, a copy of the full application and a unique ID number will be sent to the email associated to the SlideRoom account. If you do not receive confirmation of your submission, please contact <https://support.slideroom.com/>.

Curable Deficiencies

After the application deadline, any curable deficiencies identified by Enterprise will be shared with the applicant’s authorized representative by email. This email is the official notification of a curable deficiency and will include detailed instructions about correcting it. A curable deficiency is an error or oversight that, if corrected, it would not alter, in a positive or negative fashion, the review and rating of the application. Examples of curable (correctable) deficiencies include inconsistencies in the funding request and failure to submit required certifications. These examples are non-exhaustive.

Recommendations of Award

Between June 15 – 22, 2022, Enterprise will reach out with any clarifying questions to applicants as needed. These clarifications will inform scoring adjustments as applicable. This communication will be sent via e-mail. **Receiving or not receiving an e-mail during this time is not an indication of award or decline.**

On June 30, 2022, grantees will receive notification of an award. Recommendation of award and decline letters will be sent via e-mail. Recommendation of Award letters are provided as a statement of interest in developing a grant agreement with the selected organization. They are not legally binding documents or official agreements. Receiving the award is contingent upon the development of a mutually agreed upon scope of work, outcomes, and budget and successful completion of the financial review process. Awardees that fail to provide information within the requested time frame will have their Recommendation of Award rescinded.

Appendices

Appendix A: Copy of Application

Application

Organization Information

- Organization:
- Address:
- Website:
- Organization Type: Non-profit affordable housing owner/operator, Housing Authority, or Tribal Designated Housing Entities
- Please select the states with populations served by your organization.
- How many years has your organization been in business?
- Please indicate total organization annual operating budget as of March 1, 2022.
- Which of the following best describes the race and ethnicity of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Which best describes the gender of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Do more than 50% of your organization's board members identify as Black, Indigenous, or as People of Color (BIPOC)?
- Does the Chief Executive Officer, Executive Director, General Partner, or Managing Member of your organization identify as a member of the LGBTQ+ community?

Contact Information

- Primary Contact Name:
- Primary Contact Title:
- Primary Contact Phone:
- Primary Contact E-mail:
- Secondary Contact Name:
- Secondary Contact Title:
- Secondary Contact Phone:
- Secondary Contact E-mail:

Program Overview (25 points)

1. *Briefly summarize the goal of the proposed program. (200 characters).*
2. *Share an overview of the proposed program. (2000 characters).*
3. *Describe plans for the proposed program's implementation, including a timeline with an expected start date, staffing plans, and expected outcomes. Please indicate if staff are existing or if they will be added as a result of the grant. (3500 characters)*
4. *Describe your plans for sustaining the proposed program after the completion of the grant. If this is an existing program, please also identify current funding sources. (1500 characters)*
5. *Explain how this grant will help you to expand an existing program or introduce a proven model to further your organizational impact. (1500 characters)*

Population Served (25 points)

6. *Please select counties served by the proposed program.*
7. *Describe the resident population your proposed program will serve, including age, income range, race/ethnicity, and any other relevant characteristics. Priority populations are described in the “Eligible Programs” section of the RFP. (1000 characters)*
8. *Please summarize the health (physical, mental or financial) needs of the population that will be served by the proposed program. We encourage you to share stories, narratives, or quotes in your description, in addition to any supporting data (as available). Please briefly describe how the health, aspirations, and needs of the population that will be served were assessed. (2000 characters)*
9. *How will the proposed program meet the specified health needs and promote the health of the population that will be served? (2000 characters)*
10. *Please describe the strengths of the population that will be served by the proposed program (e.g., high degree of engagement, interest in volunteerism, several residents with musical talents, etc.) and how the proposed program might draw upon these strengths. We encourage you to share stories, narratives, or quotes in your description, in addition to any supporting data (as available). (1500 characters)*

Program Impact (25 points)

11. *Please share which category of scale your proposed program most accurately aligns with? (check boxes)*
 - a. *Expansion of an existing proven program*
 - b. *Introduction of a new proven model*
12. *Please summarize the existing evidence of program effectiveness in accordance with the chart displaying required evidence (see “Eligible Programs” section of the RFP). Within the summary, reference any attachments provided to demonstrate the effectiveness of the proposed program. For expansion of an existing program, please include current program size/capacity (limit 3 attachments or links). (2000 characters)*
13. *Provide a short description of the expected program scale (including number of people served) at both the start and conclusion of the grant period of performance. (1000 characters)*
14. *Describe the short and long-term outcomes that will result from the grant-funded work (e.g., number of older adults served by specific services, staff trained/retained, number of services offered, depth of services offered, etc.) and how they will be tracked. (1500 characters)*

Core Values (15 points)

Please describe how the proposed program will incorporate each of the following core values?

15. *The proposed program is resident-driven and/or offers resident leadership opportunities. (1500 characters)*
16. *The proposed program addresses health equity and/or factors associated with systemic racism. (1500 characters)*

17. The proposed program uses data to guide program delivery and ensure continuous improvement in meeting resident needs. (1500 characters)

Budget (10 points) - Please fill out and attach the budget template.

Appendix B: Enterprise's Standard Terms and Agreements for Grants

(Enterprise reserves the right to make minor edits to this document when the final Grant Agreement is prepared)

STANDARD TERMS AND CONDITIONS FOR GRANT AGREEMENT

Purpose of Agreement

The purpose of this Agreement is to specify the terms and conditions under which Grantee will receive Grant Proceeds to enable Grantee to carry out the activities described in the Work Plan, which activities are in furtherance of Enterprise's exempt purposes, and set forth in Exhibit A (the "Work Plan").

W-9 Form / Federal Tax Identification Number

Grantee must provide Enterprise with a signed and completed W-9 Form. **Grantee's name on the W-9 Form must match the name on this Contract, and, the W-9 Form must include Grantee's Federal Tax Identification number. PAYMENT WILL NOT BE MADE TO CONTRACTOR WITHOUT ENTERPRISE'S RECEIPT OF A COMPLETED W-9 FORM WHICH COMPLIES WITH THESE REQUIREMENTS.** Payment will be made payable to the name and corresponding Federal Tax Identification number found on the W-9 Form. Grantee hereby agrees to notify Enterprise immediately upon any change of any information submitted on Grantee's W-9 Form.

Authorized Uses and Expenditures of Grant Proceeds

The Grant Proceeds are only to be used for the activities specified in the Work Plan and in accordance with the budget set forth in Exhibit B (the "Budget"). If Grantee deviates from the Work Plan or any other provision in this Agreement, such deviation shall be at Grantee's risk. Any costs related to unauthorized work shall be borne by Grantee.

Grantee shall not expend more than the amount allocated for any category in the budget without Enterprise's prior written consent. However, Grantee is permitted to make minor transfers to line items (except for salary) within the Budget aggregating up to and including 10% of the Grant Proceeds without the prior written consent of Enterprise. If Grantee incurs any costs prior to the Effective Date, Grantee shall not charge those costs against the Grant Proceeds without Enterprise's written consent.

Grantee agrees that Grant Proceeds will be used in compliance with all applicable anti-terrorist financing and asset control laws, regulations, rules and executive orders, including but not limited to, the USA Patriot Act of 2001 and Executive Order No. 13224.

Grantee shall not use any portion of the Grant Proceeds to carry on lobbying or otherwise to attempt to influence specific legislation, either by direct or grassroots lobbying, nor to carry on directly or indirectly a voter registration drive, nor to make grants to individuals on a non-objective basis, nor to use the funds for any non-charitable purpose.

Confidential Information

"Confidential Information" is information which either party to this Agreement (each, a "Party"), in its sole determination, regards as confidential or proprietary including, but not limited to: borrower, grantee, or subcontractor/contractor information; fundraising materials, information regarding that Party's financial and strategic planning; Personally Identifiable Information (as defined herein); information regarding either Party's staffing; and other data, files, and/or other material, whether such information is both tangible and intangible, in writing and orally imparted. The party receiving proprietary information will be referred to as the "Receiving Party" and the party disclosing the information will be referred to as the "Disclosing Party." Both parties can be a "Receiving Party" or a "Disclosing Party."

Each Party hereby agrees that it shall not disclose or divulge any Confidential Information or any part thereof to any other person or entity or use any Confidential Information for its pecuniary benefit or for any other purpose without the prior written consent of the Disclosing Party. Upon the request of the Disclosing Party, Receiving

Party shall promptly deliver to Disclosing Party all documents or other materials in its possession, and all copies thereof, constituting or containing Confidential Information.

For purposes of this Agreement, "Confidential Information" shall not include the following: (1) information which is or becomes publicly available without fault on the part of the party disclosing such information,; (2) information which is already in the recipient's possession prior to the effective date of the Agreement and is not otherwise Confidential Information; (3) is independently developed by the recipient outside the scope of this Agreement and without references to Confidential Information; (4) is rightfully obtained by recipient (and not through either Enterprise or Contractor) from third parties who are not known to the Recipient Party to be subject to a confidentiality obligation and does not otherwise constitute Personally Identifiable Information, or (5) is demanded by a valid court order or subpoena or disclosure of which is required under applicable law or regulation, provided, however, that the party served ("Party Served") with any interrogatory, request for information or documents, subpoena, deposition, civil investigative demand or other process will provide the other party with prompt notice of the requested disclosure, if counsel for the Party Served determines that such notice is permitted by law, so that the other party may seek an appropriate protective order or waive compliance with the provisions of this Agreement.

Personal Information Protection

Grantee represents that it has implemented and maintains reasonable security procedures and practices that are: (i) appropriate to the nature of the Personally Identifiable Information (as defined herein) disclosed under this Agreement; and (ii) reasonably designed to help protect the Personally Identifiable Information from unauthorized access, use, modification, disclosure, or destruction. Personally Identifiable Information shall be defined as any information pertaining to an individual that can be used to distinguish or trace a person's identity such as name, email address, home address and phone number. Personally Identifiable Information includes the following, it being understood that the list is not exhaustive and may be defined otherwise under the applicable jurisdiction:

- Social Security Number—inclusive of the entire number of the last 4 digits;
- Driver's License Number or State ID Number;
- Passport Number;
- Alien Registration Number;
- Financial account numbers;
- Email addresses;
- Phone numbers;
- Image;
- IP address;
- Mother's maiden name;
- Any such information as would reasonably be expected to have the same protection as the foregoing examples in Grantee's industry.

Grantee agrees to keep all Personally Identifiable Information physically within the borders of the United States. Grantee shall notify Enterprise within 48 hours if any Personally Identifiable Information has been the subject of a data breach.

Inspection; Right to Audit/Record Retention

Grantee agrees that Enterprise may monitor, and conduct an evaluation of, project operations during the Period of Performance. This may include meetings with your staff to discuss projects and to review financial and other records connected with the activities financed by the Grant Proceeds. Grantee shall keep (a) accurate records documenting its performance of the Work Plan, and (b) a legible set of books of account in accordance with generally accepted accounting principles for a minimum of six (6) years after the expiration of the Period of Performance. Grantee agrees that the aforementioned records and books of account shall be open for inspection by Enterprise or its auditors.

Default and Remedies

If Grantee fails to comply with any terms in this Agreement Enterprise will notify Grantee of its breach and Grantee will have twenty (20) days from the date contained in the notice to cure the breach. A breach may include, without limitation, Grantee's failure to comply with the Work Plan, Grantee's unauthorized expenditure of the Grant Proceeds,

or the default of any other grant or loan from Enterprise, its affiliates, subsidiaries, or supporting organizations to Grantee or its affiliates, subsidiaries, or supporting organizations. Concurrent with the aforementioned notice, Enterprise may suspend and withhold disbursements of Grant Proceeds until the Grantee satisfactorily cures the breach. In addition, Enterprise may require and Grantee shall accept technical assistance which Enterprise deems necessary to complete the Work Plan.

Enterprise may immediately terminate this Agreement upon conclusion of the twenty (20) day period, if Grantee fails to cure the breach to the satisfaction of Enterprise. In the event of termination by Enterprise, Enterprise may demand repayment of all Grant Proceeds disbursed to Grantee. In addition to the rights and remedies contained in this Agreement, Enterprise may at any time proceed to protect and enforce all rights available to Enterprise by suit in equity, action at law or by any other appropriate proceedings, all of which rights and remedies shall survive the termination of this Agreement.

Nonwaiver

The failure of Enterprise in any instance to insist upon a strict performance of the terms of this Agreement or to exercise any option hereunder shall not be construed as a waiver or relinquishment for the future of such term or option from exercising any such right, power or remedy upon default at any later time or times.

Indemnification

Grantee, intending to be legally bound, hereby expressly agrees and covenants to defend, hold harmless and indemnify Enterprise, its directors, officers, agents and employees from and against any and all costs, liability, demands, claims, damage and expenses of any nature or any kind (including, but not limited to, indebtedness, penalties, fines, Enterprise's costs and reasonable legal fees) incurred in connection with this Grant or that arise out of any act or omission of the Grantee or of any of its employees or agents.

Conflicts of Interest

Except for approved eligible administrative and personnel costs shown in the Budget, none of Grantee's designees, agents, members, officers, employees, consultants or members of its governing body or any local governmental authority exercising jurisdiction over the Grant Proceeds, and no other public official of Grantee or such authority or authorities who exercise or has exercised any functions or responsibilities with respect to the Grant Proceeds during such person's tenure, or who is in a position to participate in a decision-making process or gain inside information with regard to the Grant Proceeds, has or shall have any interest, direct or indirect, in any contract or subcontract, or the proceeds thereof, for work to be performed in connection with the Grant Proceeds, or in any activity, or benefit therefrom, which is part of the Work Plan at any time during or after such person's tenure.

Relationship of the Parties

Grantee is not an employee, partner, agent of or joint-venturer with Enterprise for any purpose.

Acknowledgment of Funding

Grantee agrees to recognize Enterprise as a funding partner in the proposed project and shall favorably acknowledge Enterprise as a funder in all media publications relating to the project.

Compliance with Laws

Grantee shall comply with the requirements of all laws, rules, regulations and orders of any governmental authority applicable to it or the services being provided under this Agreement, including without limitation, the data privacy laws of any state in which Grantee shall be providing such services. Grantee shall not take any action in violation of any applicable legal requirement that could result in liability being imposed on Enterprise.

Survival

This Agreement shall remain in effect until the last to occur of: (a) the date that the Grant Proceeds have been disbursed; (b) the date that all reports and records due by Grantee to Enterprise have been submitted to and approved by Enterprise; (c) the date that there has been a closeout between Enterprise and Grantee of all issues arising out of the Grant Proceeds and this Agreement; or (d) if Grantee is in default and Enterprise decides not to terminate and requires that Grantee complete the Work Plan, the date that such Work Plan is completed.

Modifications and Amendments

Both parties may amend this Agreement so long as amendments that affect the rights and obligations of either party are executed by both parties, including, without limitation, the addition or deletion of a Work Plan activity or the alteration of existing approved activities, an extension of the Period of Performance, or a budget revision resulting in a change in the salary line or a transfer in the Budget of more than 10% of the Grant Proceeds. Administrative changes or corrections that do not affect the rights and obligations of Grantee may be made unilaterally by Enterprise with notice to, but without consent of Grantee.

Delegation; Assignment

Grantee shall not delegate any duties or assign any rights under this Assignment without the prior written approval of Enterprise. A delegation of performance will not relieve Grantee of any duty to perform or any liability for breach of this Agreement.

Governing Law

This Agreement shall be construed and enforced in accordance with, and the rights of the parties shall be governed by, the laws of the State of Maryland, exclusive of its conflicts of law rules. Grantee agrees that any litigation shall be brought and prosecuted in any District or Circuit Court of Maryland, as appropriate, or Federal District Court, with venue in the United States Court for the District of Maryland, Baltimore Division and the Grantee consents to the in personam jurisdiction of such courts.

Grantee irrevocably waives any objection to, and any right of immunity from, the jurisdiction of such courts or the execution of judgments resulting therefrom, on the grounds of venue or the convenience of the forum.

Counterparts

This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

Electronic Signature

The use of an electronic signature (“E-Signature”) by any party in executing this Agreement shall constitute the legal equivalent of a manual or handwritten signature as if the party signed this Agreement in writing. No certification authority or other third-party verification shall be required to validate the party’s E-Signature, and the lack of such certification or third-party verification will not in any way affect the enforceability of the E-Signature/s or this Agreement.