

# Dane County CDBG/HOME

## RFP Workshops

Wednesday, April 16<sup>th</sup>, 2025 at 1:00pm

Virtual, Zoom Meeting

Thursday, April 17<sup>th</sup>, 2025 at 9:30am

In-Person, Dane County Job Center



# Housing Access and Affordability (HAA) Division

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[www.cdbg.danecounty.gov](http://www.cdbg.danecounty.gov)

[www.dane-econdev.org](http://www.dane-econdev.org) (Econ. Dev't Resources)



# Agenda

- ▶ 2026 Funding Available
- ▶ 2026 Funding Categories
- ▶ Aligning to Dane County Consolidated Plan
- ▶ Meeting a National Objective
- ▶ Dane County Urban County Consortium
- ▶ 2026 RFP Timeline
- ▶ 2026 Funding Cycle
- ▶ 2026 Scoring Evaluation Criteria
- ▶ Application Requirements
- ▶ Counting Beneficiaries
- ▶ Other Compliance Considerations
- ▶ Best Practices
- ▶ Refresher/New Applicants: Eligible Activities, OpenGov



# 2026 Funding Available

- ▶ ~\$1.1 Million CDBG Annual Funds
  - ▶ Public Services = 15% of Total CDBG Funds
- ▶ ~\$500,000 HOME Annual Funds (does not include CHDO Funds)
- ▶ ~\$336,125.82 Community Housing Development Organization (CHDO) Funds
  - ▶ 2026: Estimated \$80,943.19 CHDO Funds
  - ▶ 2025: Estimated \$80,943.19 CHDO Funds
  - ▶ 2024: \$80,943.19 CHDO Funds
  - ▶ 2023: \$93,296.25 CHDO Funds



# CDBG/HOME Program Overview: 2026 Funding Categories

- ▶ Economic Development
- ▶ Fair Housing
- ▶ Homebuilding\*
- ▶ Major Home Rehabilitation
- ▶ Minor Home Repair
- ▶ Mortgage Reduction
- ▶ Public Facility Improvement
- ▶ Public Infrastructure
- ▶ Public Services
- ▶ Tenant Based Rental Assistance



\*Community Housing Development Organization (CHDO) Eligible to apply

**Categories excluded in 2026:** New Rental Construction, Rental Rehab



# Aligning to Dane County Consolidated Plan

Dane County 2025 – 2029 Consolidated Plan currently being approved.

- ▶ Review the Dane County 2025 – 2029 Consolidated Plan
- ▶ [Dane-County-2025-2029-Consolidated-Plan---DRAFT.pdf](#)
- ▶ Pay attention to page 2 of Con Plan; summary of the 5-year goals for the CDBG and HOME Programs
- ▶ All 2026 funded projects will need to align with the Dane County 2025 – 2029 Consolidated Plan.





# Meeting a National Objective

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

Meet a National Objective:

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



# Dane County Urban County Consortium

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

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

## **EXCLUDED in 2026:**

City of Madison  
Town of Dane  
City of Edgerton

**NEW:** Village of Mazomanie  
will be rejoining the consortium  
as of 10/01/2025





# 2026 RFP Timeline

CDBG & HOME	Date (Subject to Change)
RFPs Issued	April 30, 2025
Addendums or supplements to the RFP posted on the Purchasing Division website	May 21, 2025
Last day to submit written inquiries (2pm CST)	May 23, 2025
Question Response Deadline (2pm CST)	May 30, 2025
Proposals Due (2pm CST)	June 11, 2025



# 2026 Funding Cycle

CDBG & HOME	Date (Subject to Change)
Proposals Due (2pm CST)	June 11, 2025
Presentations to Application Review Team	July 24 <sup>th</sup> , July 28 <sup>th</sup> , and August 5 <sup>th</sup> 2025
Preliminary funding recommendations to CDBG Commission	September 2, 2025
Public Hearing on Final funding recommendations to CDBG Commission	October 9, 2025
Approval of County Board	December 2025
Contract Drafting	January – March 2026
2026 All Grantee Meeting (Required)	January 28, 2026
Disbursement of Funds	April 2026 (tentative)



# 2026 Scoring Evaluation Criteria

Application Review Criteria	
Item	Maximum Points
1. National Objective – Need and Justification	20
2. Project Approach	35
3. Experience and Qualifications	15
4. Financial Information	15
5. Partnerships	5
6. Shovel Ready	5
7. Past Performance	5
TOTAL POINTS	100



# Scoring Evaluation Criteria: National Objective – Need and Justification 20 PTS

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

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria: National Objective – Need and Justification 20 PTS

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

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria: National Objective – Need and Justification 20 PTS

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

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





# Scoring Evaluation Criteria: National Objective – Need and Justification 20 PTS

- ▶ Program Accessibility: How accessible is the program to low-and-moderate income persons? (worth up to **5 points**)
  - ▶ Justification of the accessibility to the program:

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



# Scoring Evaluation Criteria:

## Project Approach 35 PTS

- ▶ Project Description: A description of the work that will be undertaken and a description of how the work will address the identified need. This includes relevant eligibility guidelines, a clear referral process, a program capacity to serve clients, and a waitlist process. (worth up to **8 points**)

- ▶ Justification:

Excellent	7 – 8 points
Good	4 – 6 points
Average	1 – 3 points
Does not provide justification or ability to implement the project	0 points



# Scoring Evaluation Criteria:

## Project Approach 35 PTS

- ▶ Work Plan, Timeline, and Milestones: This is a work plan for how the project/program will be organized, implemented, operated, and administered, as well as the timeline and milestones from initiation to completion. Work on the project – meaning funds will be spent – will begin in 2026. (worth up to **7 points**)
  - ▶ Documentation and Justification:

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



# Scoring Evaluation Criteria:

## Project Approach 35 PTS

- ▶ Targeted Municipalities: The applicant identifies the municipalities that will receive targeted outreach to inform potential participants. (worth up to **5 points**)
  - ▶ Conducts targeted outreach to:

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



# Scoring Evaluation Criteria:

## Project Approach 35 PTS

- ▶ Outreach and Marketing Initiatives and Populations to be Served: Initiatives that will be implemented to inform potential participants and ensure that they are aware of the services/activities to be provided. Identifies potential populations to be served, including low- to moderate-income persons. (worth up to **5 points**)

- ▶ Justification:

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria:

## Project Approach 35 PTS

- ▶ Outcomes/Proposed Accomplishments: The total number of households are identified and can reasonably be expected to be achieved. (worth up to **8 points**)
  - ▶ Justification:

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





# Scoring Evaluation Criteria: Project Approach 35 PTS

- ▶ Displacement: If the project requires temporary or permanent displacement, indicate the number of households/businesses and describe specific assistance to be provided for displaced households/businesses. (**worth up to 2 points**, Maximum points awarded if there is no displacement)

- ▶ Documentation and Justification:

No Displacement	2 points
Displacement – Identifies households/businesses displaced, specific assistance, and a displacement plan	1 point
Displacement – Does not identify households/businesses and/or correct level of assistance	0 points



# Scoring Evaluation Criteria:

## Experience and Qualifications 15 PTS

- ▶ Experience and Qualifications: The organization has undertaken projects of similar complexity to the one for which funds are being requested. **(worth up to 4 points)**
- ▶ Experience Serving LMI Populations: The organization has experience providing services to low- and moderate-income populations. **(worth up to 4 points)**
  - ▶ Justification:

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



# Scoring Evaluation Criteria:

## Experience and Qualifications 15 PTS

- ▶ Staff Experience and Qualifications: There are staff resources with the skills and experience to administer and conduct an accountable and responsible project. Key staff with experience in this area are identified. Staff turnover is minimal. (**worth up to 4 points**)

- ▶ Justification:

Excellent	4 points
Good	3 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria:

## Experience and Qualifications 15 PTS

- ▶ Commitment to Quality: There appears to be adequate board and management oversight and a commitment to quality and service improvement. (**worth up to 3 points**)

- ▶ Justification:

Excellent	3 points
Good	2 points
Average	1 point
Does not provide justification	0 points



# Scoring Evaluation Criteria:

## Financial Information 15 PTS

- ▶ Budget Summary and Justification: An explanation for budget line items is included, as well as how the CDBG/HOME funding would support program viability. The budget is realistic. (**worth up to 5 points**)
  - ▶ Justification:

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria:

## Financial Information 15 PTS

- ▶ Organization Budget: The organization has the financial capacity to manage the project. (**worth up to 5 points**)
  - ▶ Justification:

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points





# Scoring Evaluation Criteria:

## Financial Information 15 PTS

- ▶ Funds Leveraged: Efforts have been made to secure and leverage other project funding. The application identified eligible sources of match to leverage (**worth up to 5 points**)

- ▶ Percentage of Funds Leveraged:

25% of funds leveraged from the requested amount	5 points
Up to 15% of funds leveraged from the requested amount	3 points
No additional funds were identified	0 points



# Scoring Evaluation Criteria:

## Partnerships 5 PTS

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

Excellent	5 points
Good	3 – 4 points
Average	1 – 2 points
Does not provide justification	0 points



# Scoring Evaluation Criteria:

## Shovel-Ready 5 PTS

Five points will be awarded to projects that are shovel-ready by Q1 of 2026. Public Services will automatically receive 5 points.

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

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



# Scoring Evaluation Criteria:

## Past Performance 5 PTS

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

<b>Accurate / Consistent Spending of Funds</b>	<b>Up to 3 points</b>
Agency has not returned funds in excess of 1% of awarded funds and does not have unexpended funds	3 points
Agency has not returned funds in excess of 10% of awarded funds <u>but</u> has unexpended funds from 2 years or more	1 – 2 points
If agency returned funds	0 points
<b>Program or Financial Report deadlines are met</b>	<b>Up to 1 point</b>
<b>Responsive with Communications</b>	<b>Up to 1 point</b>



# Application Requirements

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



# Counting Beneficiaries

- ▶ **IMPORTANT:** Do not overestimate the total number of beneficiaries served by the project.
- ▶ The total number of beneficiaries = the total number of forms you MUST submit in order to get reimbursed for services.
  - ▶ No duplicative addresses.
- ▶ Look specifically at how the question is worded. Does it ask for individuals or households?
  - ▶ Do not overestimate. Answer the question reasonably.
- ▶ Monthly beneficiary metrics and financial submissions will be required.
  - ▶ **75% of contract expended by September 30, 2026.**





# Other Compliance Considerations

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



# Best Practices

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



# Refresher / New Applicants

- ▶ Would your organization be a new applicant to the Dane County CDBG/HOME funding process?
- ▶ Is your organization a past applicant but you would like a refresher on eligible activities?
- ▶ Is your organization a past applicant but you have not participated in this workshop before?
- ▶ Do you have time and would like to hear what others have to ask about the program?

If any of these questions are yes, we recommend that you stay for the next set of information.



# Eligible Activities

## Public Services



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



# Eligible Activities

## Public Facilities

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



## Public Infrastructure

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





# Eligible Activities

## Economic Development

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

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



## Tenant-Based Rental Assistance

To promote access to rental housing for low-income households through the provision of rental subsidy assistance.



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# Eligible Activities

## Homebuilding (CHDO Eligible)

Construction of a new one- to four-unit property, a condominium unit, or a manufactured home (Manufactured housing must be connected to permanent utility hookups and must be located on land that is owned by the manufactured housing owner) that will be sold to low- and moderate income households via the mortgage reduction program.



## Mortgage Reduction

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

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





# Eligible Activities

## Minor Home Repair

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



## Major Home Rehabilitation

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





# Eligible Activities

## Fair Housing

Maximum Request: \$10,000.00

To promote fair housing education and outreach services, as well as, reporting on the number, bases, and resolution of fair housing complaints within the Dane County Urban County Consortium.



# OpenGov Portal

Project Detail

procurement.opengov.com/portal/countyofdane/projects/44162

CPD Monitoring Ha... Guide to National... CFR-2007-title24-v... Building HOME Onl... Electronic Code of... HOME Investment... PITI Mortgage Calc... Present Value Calcu... Daily Treasury Yield... Technical Guide for... Dane County Conte... CPD Grants Portal L...

OPENGOV PROCUREMENT


Proposals Awards Checklists Subscriptions Network

JC

Visit Help Center

County of Dane Portal

This is a private bid and does not appear in the public portal



TEST CDBG - Public Services

Request For Proposal Purchasing 94600

Project ID: CDBGTEST1234

Release Date: Tuesday, April 18, 2023 - Due Date: Wednesday, April 19, 2023 2:00pm

Private Bid Posted Tuesday, April 18, 2023 2:44pm

All dates & times in Central Time

Draft Response No Bid

Time Remaining: 22 hours, 29 minutes

Following

Prime

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Project Documents

Downloads

Addenda & Notices

Question & Answer

1. Introduction

2. RFP Overview

3. Evaluation

4. Project Overview/Scope of Services

5. RFP Responses Requirements

6. CDBG Application

7. Attachments

8. General Guidelines and Terms & Conditions

9. Standard Terms and Conditions

View All Sections

To respond to this project, please click the "Draft Response" button above.

Post Information

Posted At: Tue, Apr 18, 2023 2:44 PM

Sealed Bid Process: Yes (Bids Sealed / Pricing Sealed)

Private Bid: Yes

1. Introduction

1. Summary

Dane County is soliciting applications from organizations interested in operating a program to benefit low-and-moderate income residents of the Dane County Urban County Consortium (see Appendix A). Funding is expected to be available under the HUD-funded Community Development Block Grant (CDBG) program. The primary emphasis is on projects focusing on homeless prevention, emergency assistance, case management, transportation, and job training assistance. Please refer to the attached document: CDBG PUBLIC SERVICES PROGRAM STANDARDS (Appendix C).

Dane County requires that all applicants complete the Vendor Questionnaire/CDBG application in its entirety, and sign the Signature Power Form at the end of the Questionnaire.

3:30 PM

4/18/2023

The logo for the Dane County Department of Human Services is a circular seal. It features a central sunburst design with multiple rays. The words "DEPARTMENT OF HUMAN SERVICES" are written in a circle around the top, and "DANE COUNTY" is written around the bottom. A smaller tagline, "EMPOWERED PEOPLE THRIVING IN SAFE, JUST, AND CARING COMMUNITIES", is also present within the circular border.

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# OpenGov Portal

Project Detail


procurement.opengov.com/portal/countyofdane/projects/44162

CPD Monitoring Ha... Guide to National... CFR-2007-title24-v... Building HOME Onl... Electronic Code of... HOME Investment...

OPENGOV  
PROCUREMENT

Proposals Awards Checklists Subscriptions Network

Visit Help Center



OPEN

TEST CDBG - Public Services

Request For Proposal Purchasing 94600

Project ID: CDBGTEST1234

Release Date: Tuesday, April 18, 2023 · Due Date: Wednesday, April 19, 2023 2:00pm

Private Bid Posted Tuesday, April 18, 2023 2:44pm

Draft Response

No Bid

Time Remaining: 22 hours, 29 minutes

This is a private bid a

Project Documents

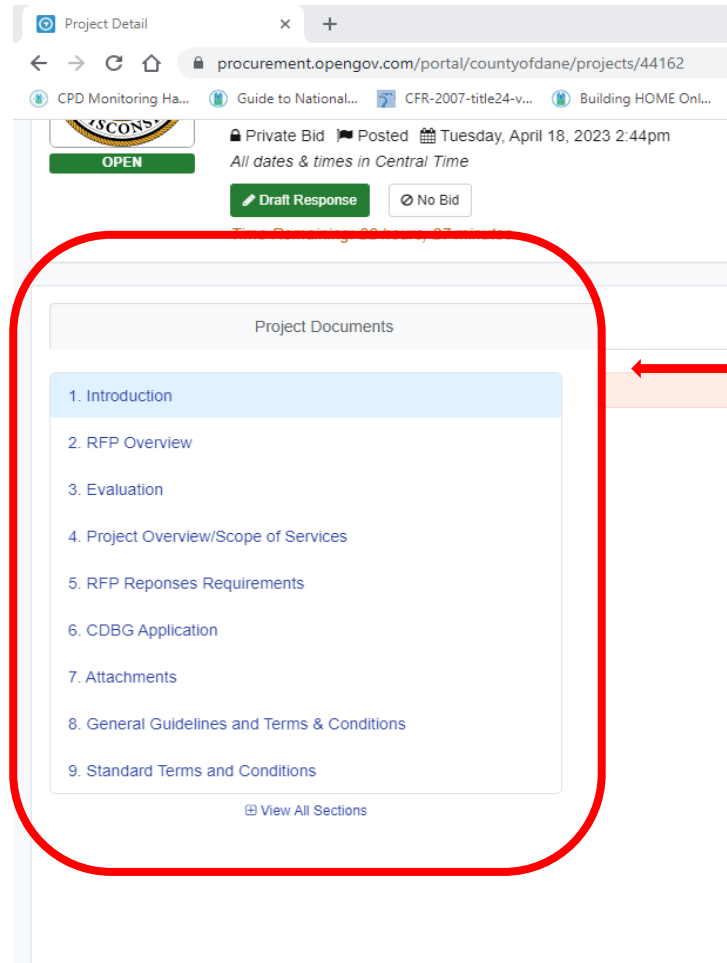
Downloads

1 Introduction

Apply Here



# OpenGov Portal



Review all the items in this column prior to submitting application through the online portal.



# Questions?



Joanna Cervantes, HAA Human Services Manager

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