

**Request for Proposal
For Community-Based Services for Older Adults
Program Year(s):
2023-2026**

Funds Available:
American Rescue Plan Act
Older Americans Act
Nutrition Services Incentive Program
Senior Community Services State Subsidy
State Alzheimer's Funds
Title XX Social Services Block Grant (Lucas County Only)
Lucas County Senior Services Levy (Lucas County Only)

**Administered By:
Area Office on Aging of Northwestern Ohio, Inc.
2155 Arlington Ave.
Toledo, Ohio 43609-1997
Phone: (419) 382-0624
Fax: (419) 382-4560**



Proposals due at:
Area Office on Aging of Northwestern Ohio, Inc.
Attention: Planning and Program Development
2155 Arlington Ave.
Toledo, Ohio 43609-1997
Or electronically to RFP@areaofficeonaging.com
No later than 5:00 PM EDT, Monday, September 19, 2022
Bidder's Workshop is scheduled for
Monday, August 8th, at 3 pm at the M. Hunt Senior Center and Via Zoom
It is highly encouraged all potential bidders attend the bidder's workshop.

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Introduction and General Guidelines

Purpose of RFP:

As the official planning and service development agency for senior services covering 10 counties in Northwestern Ohio, the Area Office on Aging of Northwestern Ohio, Inc. (AOoA), is seeking proposals from qualified respondents for the provision of home and community based services to be provided to older adults (individuals aged 60+) within the geographic area of: Defiance, Erie, Fulton, Henry, Lucas, Ottawa, Paulding, Sandusky, Williams and Wood Counties. Services will be rendered under Title IIIB (Supportive Services and Senior Centers), Title IIIC (Nutrition Service), Title IIID (Evidence-Based Disease Prevention and Health Promotion Services), Title IIIE (National Family Caregiver Support Program) and Title VII (Elder Abuse and Ombudsman) of the Older Americans Act (OAA) for Program Year 2023-2026 with services starting on or after January 1, 2023. In addition, the AOoA is making available, through this Request for Proposals (RFP), American Rescue Plan Act (ARPA), Nutrition Services Incentive Program (NSIP), Senior Community Services (SCS) and State Alzheimer's Respite funds (ALZ). Finally, this RFP also includes funds for programs and services provided in Lucas County; Lucas County Senior Services Levy (LCSS) and Title XX Social Services Block Grant (TXX).

The awarded respondents will be required to provide services in accordance with *AOoA Service Provider Policies and Procedures Manual*, *AOoA Policy and Procedures for Nutrition and Wellness Services* and published rules from the Ohio Department of Aging, Chapter 173 of the Ohio Administrative Code (<https://codes.ohio.gov/ohio-administrative-code/173>). Compliance with requirements will be the responsibility of the awarded respondent.

To provide the best service with the highest quality and most cost-effectiveness, respondents will have the opportunity to apply for as much of or as little of the request for proposal services, depending on capability and capacity. Not being able to provide all services or not being able to provide services to all of our service area will not disqualify an applicant.

Background Information:

This RFP is separated into 2 major bidder-type sections:

- Family Caregiver Support Program (FCSP) and Plan4Home (P4H) Application
 - The AOoA Family Caregiver Support Program provides information, referral and assistance, as well as, case management to caregivers of older adults.
 - The AOoA Plan4Home Program provides case management to older adults.
 - Both of these programs contract with providers for home and community based services, which help older adults remain independent in the home.
 - For both of these programs, the AOoA staff administer the program, including data entry into WellSky Aging and Disability (formerly SAMS), the state designated database, and collection of program income/cost share. In addition, staff authorize services based on consumer demand and preference.
 - The services that will be purchased under this RFP for these programs include Chore (includes pest control), Personal Care, Homemaker, PERS, Home Delivered

Meals, Home Maintenance, Home Medical Equipment, Grocery Ordering and Delivery, Transportation: One-Way Trip, Socialization/Telephoning, Socialization/Visiting, FCSP Health Screening/Medical Assessment, FCSP Adult Day Service, FCSP Institutional Care, FCSP Education/Training, FCSP Counseling (Support Groups included) FCSP Benefits Counseling.

- Potential funding sources include Alzheimer’s Respite Funds; OAA/ARPA Titles IIIB, IIIC2 and IIIE, Lucas County Senior Services Levy, Senior Community Services State Subsidy, and Title XX Social Services Block Grant.
- OAA Home and Community Based Services (HCBS) Proposal
 - For these programs, the provider is responsible for the program administration to include data entry into WellSky Aging and Disability (formerly SAMS), the state designated database.
 - The service provider submits, thru this proposal, a plan for services, which includes a budget.
 - The AOoA then contracts with providers for a set amount of units of service, based upon anticipated available funding.
 - Eligible Services include Adult Day, Alzheimer’s Respite Services, Benefits Counseling, Care Coordination, Chore, Congregate Meals (includes Grab and Go), Consumer Finding/Outreach, Culturally Appropriate Meals, Education/Instruction, Grocery Shopping Assistance, Grocery Shopping Ordering and Delivery, Health Education (Evidence-Based Wellness Programs), Health Screening/Medical Assessment, Health Treatment/Medical Treatment, Home Delivered Meals, Home Delivered Meal Assessment, Home Maintenance/Repairs, Legal Assistance, Long Term Care Ombudsman, Nutrition Counseling, Nutrition Education, Socialization/Recreation, Socialization/Telephoning, Socialization/Visiting, Supportive Services, Transportation: One-Way Trip, Assisted Transportation: One-Way Trip.
 - Funds are also available for improving infrastructure to support the eligible services listed above, to include but not limited to, multipurpose senior center facility improvement, vehicles, and/or equipment. Examples of this are technological equipment and solutions aimed at alleviating negative health effects of social isolation on older adults and/or caregivers, facilities updates for senior centers/community focal points, purchasing supplies and equipment to modernize and/or enhance senior centers, establish electronic issuance of meal benefits (i.e. Senior Dine), purchase supplies and equipment to enhance the dining environment, purchase technology to deliver evidence-based wellness programs electronically, purchase licenses for evidence-based wellness programs, training for coaches/leaders for evidence-based wellness programs, build capacity for service delivery.
 - Potential new services for caregivers include but are not limited to technological equipment and solutions aimed at alleviating negative health effects of social isolation on older adults and/or caregivers and evidence-based wellness programs.

- Potential funding sources include Alzheimer’s Respite Funds, OAA/ARPA Titles IIIB, IIIC, IIID and Title VII; NSIP and Senior Community Services State Subsidy. In addition, Lucas County Senior Services Levy is available in Lucas County only.

Targeting Services

Per the Older Americans Act, services will be targeted to adults, age sixty or over with the greatest socio-economic needs with particular attention to:

- Low-income older individuals
- Low-income minority older individuals
- Older individuals with limited English proficiency
- Older individuals residing in rural areas, and
- Older individuals at risk for institutional placement.

The Older Americans Act provides the following definitions for greatest socio-economic needs:

- The term “at risk for institutional placement” means with respect to an older individual, that such individual is unable to perform at least 2 activities of daily living without substantial assistance (including verbal reminding, physical cuing, or supervision) and is determined by the State involved to be in need of placement in a long-term care facility.
- The term “disability” means (except when such term is used in the phrase “severe disability”, “developmental disabilities”, “physical or mental disabilities”, or “physical disability”) a disability attributable to mental or physical impairment, or a combination of mental and physical impairments that results in substantial functional limitations in 1 or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning and emotional adjustment.
- The term “greatest economic need” means the need resulting from an income level at or below the poverty line.
- The term “greatest social need” means the need caused by noneconomic factors, which include physical and mental disabilities; language barriers; and cultural, social and geographical isolation, including isolation caused by racial and ethnic status that restricts the ability of an individual to perform normal daily tasks or threatens the capacity of the individual to live independently.

President Biden thru Executive Orders further identifies “greatest social need” as the following populations: individuals who are Black, Latino and Indigenous and Native Persons, Asian Americans and Pacific Islanders, and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; and persons who live in rural areas.

The Ohio Department of Aging (ODA) further identifies specific target populations at risk of greatest social need, secondary to social, cultural or geographical isolation. These include:

- Older individuals with severe disabilities

- Older individuals with Alzheimer’s disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and,
- Older individuals who are Holocaust survivors

The Area Office on Aging also identifies veterans who have served in the armed forces as a target population with greatest social need at risk for social isolation.

Anticipated Contract Term:

This RFP is for the fiscal period beginning January 1, 2023 and ending December 31, 2026. The AOoA may terminate the agreement, rather than fulfill all years of the multi-year term, under any one or more of the following circumstances:

- The provider does not demonstrate satisfactory performance
- The provider does not meet the match requirements
- The AOoA does not have funds to pay for the goods or services for a subsequent year
- A situation arises that was unforeseen at the time the AOoA and the provider entered into the agreement. Examples of unforeseen situations are changes in the market conditions or changes in the law regulating the goods or services the agreement covers.

Availability of Funding:

The agreement is a purchase of service, which means a provider is paid, wholly or in part, a pre-determined “unit of service” reimbursement rate for goods and services actually delivered in accordance with federal, state and AOoA policies and procedures. All costs to provide the service should be included in the unit of service rate.

The funds allocated each contract year are subject to limitations of funds allocated to the AOoA from federal, state and local sources. Situations for which the AOoA may increase the unit rate include, documented increased costs associated with implementing more person-centered services, improved quality and incentive payments for performance outcomes, documented increase in service costs (i.e. increase in gasoline cost).

Payment will be made by the 15th of the month for services provided the month prior, providing accurate fiscal and designated data base reports (i.e. WellSky Aging and Disability (formerly SAMS) database for OAA HCBS providers) were submitted by the 5th working day of the month.

For Family Caregiver Support Program and Plan4Home contracts, the provider is only reimbursed for pre-authorized services as specified in the signed agreement.

For OAA Home and Community Based Services, if, by September 30 of each year, the AOoA determines that a service provider is not earning a proportionate share of the funds specified in the contract between the service provider and the AOoA, the AOoA may reallocate funds that it estimates a service provider will not earn to other service providers.

To be eligible to receive funding under this RFP, applicants must be a formally organized service agency or organization in existence and providing services for at least three years prior to the date of application. Applicants must be able to demonstrate that they have sufficient funds for start-up and operations for at least 60 days for all services requested under this application. Any provider the System for Award Management database lists as excluded or disqualified from agreements involving federal funds is ineligible.

Family Caregiver Support Program and Plan4Home

For Family Caregiver Support Program and Plan4Home, funds are allocated based on service authorization and participant demand and direction. Please note for FCSP supplemental services (home maintenance, home medical equipment and FCSP Health Screening/Medical Assessment) there will be a required three bid comparison done annually as services are requested before authorizing services.

OAA Home and Community Based Services

For OAA Home and Community Based Services, the AOoA will negotiate the cost of services on an annual basis with the provider.

For OAA HCBS, federal funds of the Older Americans Act will be allocated based on the funding formula (**Appendix A-Funding Formula**), provider capacity, and provider's funding request in their proposal; additionally, proposals must meet Request for Proposal guidelines, the rating criterion and AOoA board approval. AOoA reserves the right to allocate funds from county to county or program to program based on demonstrated need.

Estimated Funds for 2023

These dollar amounts are estimates *only* and based on 2022 funding allocations. Estimated funds for provider services include about \$760,000 in Title IIIB OAA, \$718,000 in Title IIIC1 OAA, \$1 million in Title IIIC2 OAA, \$21,000 in Title IIID OAA, \$16,391 in Title VII Elder Abuse OAA, \$16,182 Title VII Ombudsman, \$291,000 in Senior Community Services, \$4 million in Lucas County Senior Services Levy, \$850,000 in Nutrition Services Incentive funds (NSIP), ARPA IIIB \$463,000, ARPA IIIC1 \$190,000, ARPA IIIC2 \$491,000 and ARPA IIID \$48,000. AOoA reserves the right to accept or reject any proposal submitted.

Quality Improvement/Performance Measurement:

The AOoA wants to ensure the highest quality services are provided to older adults. In an effort to improve quality, one of the objectives in our 2023-2026 Strategic Area Plan is to incentivize service providers to deliver higher quality services. Our strategy to achieve this objective is to establish continuous quality incentive payments for providers after developing outcomes measurements and a baseline. During this RFP cycle, the AOoA will explore the development of performance metrics because we want to establish effective, appropriate, measureable standards to assess quality. If performance measures are developed a baseline will be determined, as well. Then, the AOoA will explore linking payments/incentives to performance

measures in subsequent program years based on available funding source, rules and regulations. This may result in additional reporting/data entry.

In addition, the AOoA may consider discontinuing funding those existing providers that have chronic low participation so those resources can be used to fill the identified service gaps.

Qualifications of the Bidder

This RFP is a competitive process open to non-profit, for-profit, private or public bidders who have been an established business for a minimum of three years and in good standing with the Ohio Secretary of State and the Office of the Ohio Attorney General. Applicants must be able to demonstrate that they have sufficient funds for start-up and operations for at least 60 days for all services requested under this application. Any provider the System for Award Management database lists as excluded or disqualified from agreements involving federal funds is ineligible.

Bidders will be required to provide services in accordance with Older Americans Act found at: <https://acl.gov/sites/default/files/about-acl/2020-04/Older%20Americans%20Act%20Of%201965%20as%20amended%20by%20Public%20Law%20116-131%20on%203-25-2020.pdf> and published rules and policies of the Ohio Department of Aging found at: <https://codes.ohio.gov/ohio-administrative-code/173>. Compliance with requirements is the responsibility of the awarded bidder/applicant.

- Bidder/Applicant must possess the ability to perform successfully under the terms and conditions of the contract.
- Bidder/Applicant must meet the Conditions of Participation as specified in the Acknowledgements, Assurances and Certifications section of this proposal.
- Bidder/Applicant must provide proof of current registration with the Secretary of State as a non-profit organization, a cooperative, or a for-profit business, limited liability company, limited partnership, or a partnership having limited liability.
- Bidder/Applicant must be in good standing with the local health department and/or state or federal Department(s) of Agriculture, as documented by attaching a copy of the most recent Ohio Department of Agriculture/Ohio Department of Health Standard Inspection Report for each preparation site and a copy of current Food Service Establishment License for preparation site. “Good standing” is defined as the food service establishment license has not been nor is in the process of being denied, suspended or revoked.
- Bids/applications are encouraged from small businesses, women-owned businesses and minority-owned businesses.
- Bidder/Applicant is required to demonstrate financial solvency.
- Bidder/Applicant may bid on the entire geographic area of Defiance, Erie, Fulton, Henry, Lucas, Ottawa, Paulding, Sandusky, Williams and Wood Counties or portions thereof.
 - Bids will be accepted for as small as one congregate meal site program/senior center, or one neighborhood of services.

This is a competitive process open to all entities: non-profit, for-profit, faith-based, private and public. Applicants, whose existing contracts with AOoA are not in good standing, will not be considered for a contract. Applicants must meet minimum requirements to be considered for a contract as specified in the rating section of this proposal for the service provided.

AOoA is specifically interested in receiving proposals from organizations with previous or current experience in providing these services. Providers who are certified through Ohio's Medicaid Waiver program, PASSPORT, or other programs for related services are strongly encouraged to apply.

Right to Reject Proposal:

AOoA reserves the right to reject and/or accept any or all proposals and/or applications if it is deemed in the best interest of the Agency, even those submitted after the submission deadline.

RFP and Submission Information:

Proposal deadline and submittal procedures:

Date: Monday, September 19, 2022
Time: 5:00 PM EDT
Location: Proposals must be submitted to:
Area Office on Aging of Northwestern Ohio, Inc.
Attention: Program and Planning Department
2155 Arlington Ave
Toledo, OH 43609
Or, electronically to RFP@areaofficeonaging.com

All proposals must be complete. Incomplete proposals may not be reviewed. Faxed proposals will not be accepted. The AOoA reserves the right to accept proposals after the deadline, if it is deemed in the best interest of the Agency.

If submitting a paper copy, proposal must be submitted in a sealed envelope or package. The outside of the envelope or package must clearly indicate "AOoA Proposal for Community Based Services for Older Adults" The name and address of the respondent must also be clearly printed on the outside of the envelope or package.

Bidder's Conference:

All potential bidders are highly encouraged to attend the Bidder's Conference, which will be held on:

Monday, August 8th at 3 pm:
Margaret Hunt Senior Center.
2121 Garden Lake Parkway
Toledo, OH 43614

Or, via Zoom.

Autumn Richards is inviting you to a scheduled Zoom meeting.

Topic: 2023-2026 OAA HCBS Bidder's Conference

Time: Aug 8, 2022 03:00 PM Eastern Time (US and Canada)

<https://us06web.zoom.us/j/85291633752?pwd=RHISTThESHZ5ZFNGQmFnZ25mNFk4QT09>

Meeting ID: 852 9163 3752

Passcode: 131400

One tap mobile

+13017158592,,85291633752# US (Washington DC)

+13126266799,,85291633752# US (Chicago)

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 646 931 3860 US

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 386 347 5053 US

+1 564 217 2000 US

+1 669 444 9171 US

+1 720 707 2699 US (Denver)

Meeting ID: 852 9163 3752

Find your local number: <https://us06web.zoom.us/j/85291633752?pwd=RHISTThESHZ5ZFNGQmFnZ25mNFk4QT09>

The purpose of the Bidder's Conference is to clarify the RFP process and the scope of the required services. A question and answer session will follow the presentation. The AOoA strongly encourages all prospective respondents to attend the conference. No information stated at the meeting or in conversation with the AOoA staff is legally binding on the AOoA unless it is contained in a written addendum to the RFP.

Contact Person:

Please direct any questions to the following:

Planning and Program Development

RFP@areaofficeonaging.com

Please note any questions submitted outside of the bidder's conference must be in writing and received before August, 18, 2022 by 5 pm.

Timeline:

Release Date of this Request for Proposals:	August 7, 2022
Bidder's Conference:	August, 8, 2022
Final Date to Submit Bidder's Questions:	August 18, 2022
Application Due:	September 19, 2022
Proposal Review Committee and AOoA Board of Directors Approval:	October 2022
Release of Contracts:	November 2022
Anticipated Contract Services Effective Date:	January 1, 2023

Note: Renewed annually thru December 31, 2026. AOoA reserves the right to adjust the contract effective dates as circumstances dictate.

Format of the Proposal/Application:

All Proposals must be prepared on 8 ½" x 11" letter size paper, typed, with page numbers, 1" margins, minimum 12 pt. font, double-spaced, program narrative should be no more than 30 pages.

Paper copy proposals must be securely bound to ensure that the entire contents remain complete and intact. Submit one (1) complete original signature set of all RFP documents.

Detailed Application Review:

Applications from existing providers will each be reviewed individually and judged on their own merit. AOoA may compare all narrative, statistical and financial information for previous full contract years, current mid-year, and current year/twelve month projection performance data from information available to AOoA; similar past performance information will be requested of any new applicants. Application review may also use aggregate data such as from the WellSky Aging and Disability (formerly SAMS) or NAPIS reporting systems and various internal data related to service provisions.

OAA Home and Community Based Services Proposals

For OAA HCBS proposals, all final decisions will be made by the PRC Committee and the AOoA Board of Directors.

Family Caregiver Support Program and Plan4Home Applications

For Family Caregiver Support Program and Plan4Home, applications will be reviewed by AOoA staff rather than the PRC Committee. Final decisions will be made by the AOoA Board of Directors.

Instructions for Family Caregiver Support and Plan4Home Application

Please complete this application if you are only applying to be a provider for the Family Caregiver Support and Plan4Home Programs.

If you would also like to submit a proposal for the Older Americans Act Home and Community Based Services, then please proceed to the OAA HCBS proposal instructions section on page 19.

General Instructions:

1. Prior to completing the application, please review the service provider conditions to contract awards-purchase of service & grant award policy (Appendix B) service taxonomy (Appendix C), OAC Chapter 173, in part (Appendix D), nutrition menu, meal and records documentation procedures (Appendix E), and Wellsky Aging and Disability (formerly SAMS) data collection procedures (Appendix F).
2. Read all instructions and become familiar with the application forms prior to their completion.
3. The application will be provided electronically in Microsoft Word and Excel format on-line at www.areaofficeonaging.com.
4. Applicants must meet the Conditions of Participation as specified in the Acknowledgements, Assurances and Certifications section of this proposal.
5. To be considered for a contract, any applicant, who is not currently an AOoA contracted provider for OAA services, must provide proof of current registration with the Secretary of State as a non-profit organization, a public agency, a co-operative, or a for-profit business/corporation, limited liability company, limited partnership, or a partnership having limited liability.
6. Applicants must meet minimum requirements to be considered for a contract as specified in the rating section of this proposal for the service provided.

Background Information/Scope of Work:

Family Caregiver Support Program

Outside of nursing homes, unpaid caregivers provide most long term services and supports. In fact, 87% of caregiving is provided by unpaid family caregivers. The average family caregiver spends 24 hours per week on unpaid caregiving activities and spends over \$5,000 per year on out of pocket caregiving expenses for their aging loved one. In addition, 34% of caregivers are 65 years of age or over, and upwards of 75% of all caregivers are female. Research has shown that caregiving exacts a heavy emotional, physical and financial toll. The AOoA Family Caregiver Support Program provides information, referral and assistance, as well as, case management to caregivers of older adults. In addition, they contract with providers for additional services as needed.

The following specific populations of family caregivers are eligible to receive services:

- Adult family members or other informal caregivers age 18 and older providing care to individuals 60 years of age or older;
- Adult family members or other informal caregivers age 18 or older providing care to individuals of any age with Alzheimer's disease and related disorders;
- Older relatives (not parents) age 55 and older providing care to children under the age of 18; and
- Older relatives (not parents) age 55 and older providing care to adults age 18-59 with disabilities.

Plan4Home

The AOoA Plan4Home Program provides case management to older adults throughout our service area, who are not enrolled in a Medicaid Waiver program. In addition, they contract with providers for additional services as needed.

To be eligible for enrollment in the Plan4Home program, an individual must meet the following requirements:

- Be 60 years of age or older
- Permanently reside in a non-institutional setting
- Participate in an initial eligibility assessment to determine if the individual's care needs can be met through the Plan 4 Home program.
- Must need ongoing or episodic case management for coordination of services delivered by community-based provider and/or information for caregivers.
- Individuals receiving services funded through Title XX, must also meet income eligibility guidelines (household gross monthly income below 150% FPL).

- Priority enrollment is given to those older adults identified at most risk. At risk criteria may include the following:
 - Indications of or reported/suspected cases of self-neglect
 - Individuals who exhibit the greatest social need
(*i.e. physical and mental disabilities; language barriers; or cultural, social, racial/ethnic or geographical isolation that restrict ability to perform daily tasks or threaten capacity for independent living*)
 - Low income individuals
 - Minority Individuals
 - An increased risk for nursing home placement
 - Reside in rural areas
 - The person lacks another case management, personal care, and/or homemaking services in the home or community.
- Be determined to need assistance with personal care, homemaking or both based on the following criteria:
 - Hands on assistance with at least 1 activity of daily living (ADLs) **OR**
 - Hands on assistance with at least 3 instrumental activities of daily living (IADLs) **OR**
 - Hands on assistance with one ADL and one IADL
- Sign an agreement confirming consumer's desire to participate in Plan 4 Home and approval of the established plan of care
- Have needs that can be safely met through Plan 4 Home in a home-based setting as determined by Plan 4 Home staff or designee
 - Require 6 hours per week or less for personal care, homemaking, or both. No more than 24 hours of services per month

Special Populations

As previously mentioned, the OAA, ODA and AOoA target specific populations. Thru our strategic planning process the AOoA has identified the need for services that meet the unique needs of our older adults' priority populations (e.g. rural, low-income, minority, limited English proficiency, Holocaust survivors, LGBT, disabled) to include culturally competent home care services. Research suggests older adults, who identify as Lesbian, Gay, Bisexual, Transgender (LGBT), may be less likely than heterosexual elders to access aging network services and providers because they feel discrimination or harassment. In addition, 20% of LGBT individuals and 44% of older transgender individuals feel their relationship with their healthcare provider would be adversely affected if their health provider knew their sexual orientation/gender. LGBT older adults are twice as likely to be single as an older adult, twice as likely to reside alone and three to four times less likely to have children.

Detailed Instructions:

Request for Area Office on Aging FCSP/Plan4Home Contract PY2023-2026.

<u>ITEM</u>	<u>COMMENTS</u>
Purpose of Request	Please be sure to check everything that applies. More than one category may apply in your request.
Applicant Agency: (Sponsor)	Place the legal name of the sponsoring Organization in this area.
Date:	Self-explanatory
dba Project Name:	Place the name of the project in this block (if different from the legal name of the sponsor).
Federal Tax I.D.:	Place the nine-digit Employer Identification Number assigned to the sponsoring organization by the Internal Revenue Service in this area.
Business Address:	Place the primary address where the Applicant Agency is located in this area.
Mailing Address:	Place the address where correspondence should be sent if different from the business address given.
Executive Director/Director/CEO:	Place the name of the Executive Director/Director/CEO to be contacted in the event questions arise regarding this application.
Phone Number:	Self-explanatory.
Services to be Provided:	Provide the services to be provided, the unit rate and the counties you intend to serve.
Names, Signatures & Titles:	Place the names, title and dates in the areas provided. The person signing in this section must have the legal authority to contract on behalf of the agency.

Program Narrative:

Organizational Capacity-All applicants should complete this section.

Service Delivery-Please answer questions for all the services for which you are requesting a contract. Please note there are questions specific to transportation and home delivered meals providers, as well.

For Home Delivered Meal Providers, Person-Direction may include, but not limited to:

- Serving traditional, hot meal on Thanksgiving and Christmas Days.
- Offering culturally appropriate meals.
- Offering a choice of food items within a meal, which could include choice of sides and/or entrée.
- Offering the choice of vegan/vegetarian option, lower-fat and lower sodium food alternatives for high fat and high sodium items, as well as, the choice of a lower carbohydrate dessert.
- Providing key nutrient information (i.e. calories, fat, sodium, carbohydrate) on a HDM menu or dining site menu board, which allows participants to make informed choices.
- Incorporating locally-grown fresh fruits and vegetables as an alternate to canned and frozen items.
- Offering home delivered meal participants the choice of hot or frozen meals, choice of delivery time (morning or afternoon) and delivery frequency (daily or periodic).

Program Unit Rate-Please answer questions related to the unit rate for services. Please note: Appendix H contains the average unit rate for services provided in our region. Information Extracted from WellSky Aging and Disability Database by Ohio Department of Aging.

Attachments:

Please insert/attach the following documents with your application:

- Organizational chart.
- Resumes/bios of Key Staff and Copy of Licensures for LSWs, RNS and Counselors.
- Last 3 years of audited financial statements and Internal Revenue Service (IRS) tax returns for new providers
- Copy of any proposed subcontract(s) that will be entered into with funds from this application
- Food service license and food safety inspections for HDM service applicants only.
- Insurance policy (minimum \$1 million liability)

Acknowledgement, Assurances, and Certifications:

Please complete and sign acknowledgements, assurances and certifications.

The Minority Agency Certification should only be completed if applicable.

Rating Criteria:

In order to be considered for a contract, the provider must also submit:

- All acknowledgements, assurances, certifications listed on the checklist
- Insurance policy (minimum \$1 million liability)
- Last 3 years of audited financial statements and Internal Revenue Service (IRS) tax returns for new providers
- Copy of any proposed subcontract(s) that will be entered into with funds from this RFP, and
- Food service license and food safety inspections for HDM service applicants only.

All applications submitted will be evaluated on a point system. Points will be awarded based on the following:

Rating Criteria of Proposals	
<u>Section I</u> (10 points each)	<u>Score</u>
Organizational Chart -5 pts.	
Resume of Key Staff (Half page bio accepted) and Copy of Licensures for LSWs, RNs, & Counselors – 5 pts.	
<u>Section II</u> (20 points total)	<u>Score</u>
Applicant is providing service with another AOoA funding source-5 pts.	
Provider performance with another AOoA funding source.-5 pts.	
Unit Rate is no more than 1 standard deviation from average unit rate -10 points	
<u>Section III:</u>	<u>Score</u>
Organizational Capacity-20 pts	
Service Delivery-30 pts	
Program Unit Rate-20 pts	
TOTAL SCORE	
Total of 100 Points Possible - Must Score 70 or More Points to Qualify. Applications receiving less than a score of 70 points will not be considered.	

Instructions for Older Americans Act Home and Community Based Services (OAA HCBS) Proposal

General Instructions:

1. Prior to completing the application, please review the service provider conditions to contract awards-purchase of service & grant award policy (Appendix B) service taxonomy (Appendix C), OAC Chapter 173, in part (Appendix D), nutrition menu, meal and records documentation procedures (Appendix E), and Wellsky Aging and Disability (formerly SAMS) data collection procedures (Appendix F).
2. Read all instructions and become familiar with the application forms prior to their completion.
3. The application will be provided electronically in Microsoft Word and Excel format on-line at www.areaofficeonaging.com.
4. Applicants must meet the Conditions of Participation as specified in the Acknowledgements, Assurances and Certifications section of this proposal.
5. To be considered for a contract, any applicant, who is not currently an AOoA contracted provider for OAA services, must provide proof of current registration with the Secretary of State as a non-profit organization, a public agency, a co-operative, or a for-profit business/corporation, limited liability company, limited partnership, or a partnership having limited liability.
6. Applicants must meet minimum requirements to be considered for a contract as specified in the rating section of this proposal for the service provided.

Primary Considerations for OAA HCBS proposals:

1. Complete, accurate, and timely submittal of the application;
2. Indicators of quality, contract compliance and capacity, such as past performance and Budget Narrative (It is expected performance that is not ideal will be adjusted to meet performance metrics);
3. Clientele to be served (higher percentages of individuals in target populations identified on pages 5-6 will increase the score);
4. Number of units and resulting unit rates for a service;
5. Amounts of matching funds, client contributions, and other cash (higher amounts are more favorable; more matching dollars, client contributions or cash from other sources will increase the score); and

6. For nutrition services: Amount of person direction incorporated into nutrition services (more instances of person direction is more favorable).

Background Information/Scope of Work:

Unmet Needs and Gaps in Service

The AOoA has completed our Strategic Planning Process for 2023-2026. As part of this planning process, the Center for Community Solutions assisted with the completion of a needs assessment of older adults and caregivers in the region. Some of the unmet needs and gaps in services identified during this process include:

- Need for data to drive funding decisions that are made regarding service providers, especially with senior centers. Historically, the AOoA has invested more in senior centers than many other Ohio Area Agencies on Aging. However, there are gaps in service areas, for example western Lucas County, and quality of services among senior centers.
- Participation at senior centers and nutrition dining sites have been declining. The success of both the senior center and dining program are interconnected. It is integral both of these entities work together on innovative service delivery to meet the changing needs of the older adult population we serve. Currently, outside of Lucas County the same provider, who operates a senior center also operates the meal program at the senior center. However, in Lucas County the majority of meals are prepared by a provider, who does not operate any of the senior centers.
- Need for effective client finding, as well as, culturally competent service delivery for underserved special populations to include non-English speakers, people from different religious backgrounds and individuals who identify as LGBT. This includes culturally appropriate meal services.
- Need to better coordinate and expand highly successful evidence-based practices related to chronic disease prevention and management.
- Need for coordinated, impactful service delivery. For example, transportation services range from county-wide coordinated public transportation to no viable public transportation options outside of OAA contracted providers. Specifically in Lucas County, there is currently one provider of medical transportation and several senior centers contracted to provide non-medical transportation.
- Services are needed to combat social isolation among homebound older adults.
- Need for benefits counseling.
- Need for services to better support individuals with Alzheimer's disease and related dementias and their caregivers.
- Need to strengthen the home health care workforce.
- Need for Age-Friendly and Dementia-Friendly Communities.
- Need for affordable housing, service coordination and home repair/modification.

Strategies to Meet Unmet Needs

Areas of Interest to meet unmet needs include:

- Title IIIB (Supportive Services)
 - Innovative Programs to Address Social Isolation.
 - Case Management and Home Care
 - Benefits Counseling to include SNAP Outreach, Information and Assistance
 - Tablets/Technology to Reduce Social Isolation and/or Provide Telehealth
 - Facilities Improvements-Senior Centers/Community Focal Points
 - Housing and Home Repair to include Wrap Around Services to Support Older Adults in Senior Housing to Age in Place
 - Opioid Abuse Prevention
 - Service Provider Software
 - Assessment of Impact of Senior Center Activities
 - Adult Day Services
 - Educational recreation classes; such as foreign languages, music and arts instruction, art museum, continuing education, etc.
 - Efforts to continue to protect older adults during the COVID-19 pandemic and beyond, such as medical treatment (vaccinations), supportive services (coordinating vaccinations), client finding, education/instruction and transportation (to/from vaccination clinics).
- Title IIIC (Nutrition)
 - Culturally Appropriate Meals
 - Restaurant Meals for Areas with Service Gaps
 - Provider Software Improvements
 - Grocery Shopping Ordering and Delivery Service.
- Title IIID (Evidence-Based Wellness Programs)
 - Expansion of Evidence Based Wellness Programs
 - Falls Prevention
 - Home Meds

Lucas County Only

- Expand service delivery in western Lucas County.
- Expansion of direct services for individuals with Alzheimer's disease and dementia to include, but not limited to, education/instruction, care coordination and evidence-based wellness programs.

Senior Center Accreditation

The AOoA is interested in supporting senior centers in pursuing accreditation thru the following potential supports:

- Accreditation Fee
- Funding for Technical Assistance
 - AOoA Provide direct payment to mentor or project manager, or
 - AOoA pay provider to subcontract with a consultant, or
 - Accredited senior center interested in providing technical assistance to other senior center directors undergoing accreditation.

Pilot Programs

We realize services/expansion of current services to meet unmet needs, which are not quite ready for implementation on January 1, 2023. In addition, new programs may not prove successful/impactful. Therefore, we are accepting proposals for pilot programs, for which the implementation date may be delayed until a later date within the funding cycle. In addition, outcomes/evaluation criteria will be established for these funding opportunities. Providers will be expected to provide monthly updates related to the outcomes/evaluation criteria. The funding for pilot programs will be for 12 months with the possibility of renewing based on funding and outcomes. While the program will be reviewed monthly, the final determination for renewing funding will occur the ninth month of the pilot project. Please refer to special instructions in the program narrative for requesting this funding.

Aging and Disability (formerly SAMS) Data Entry

For all OAA HCBS services, data entry is required in WellSky Aging and Disability (formerly SAMS) database. The AOoA pays for 1 user license per service provider for this database. Additional license may be purchased at the service provider expense. Currently, the cost of an additional license is \$425.08/year. This is subject to change.

WellSky Aging and Disability data is to be collected and reported as an integral part of the Service Provider's day-to-day operations. At a minimum, providers are required to report all contracted service units plus the units provided with required matching funds. In addition, all congregate and home delivered meal providers are required to report all NSIP eligible meals served, even those provided by local funds. NSIP funding is based on the total number of meals served. An Aging and Disability Agency Summary Report shall be submitted with the monthly request for payment.

Currently, information required to be captured in the Aging and Disability database varies by service. Some services are reported by individual and others are reported as an aggregate number of consumers in a group. Depending on the service, providers are responsible for collecting and reporting information, such as participant name, date of birth, gender with which the individual identifies, address, in poverty (yes/no), lives alone (yes/no), nutrition risk based

on DETERMINE checklist score, rural (yes/no), number ADL/IADL, ethnicity and ethnic race, disabled (yes/no), NSIP eligible (yes/no) , NSIP eligible type, service type, service units, and funding source.

The AOoA desires to further substantiate efficient and impactful utilization of Lucas County Senior Services levy funds and better understand the average daily number of participants served by a provider and the average number of services participants receive in a day. To this end contracted providers of services in Lucas County are encouraged to enter all services by individual.

Data entry and reporting requirements may change during the contract period based on reporting required by the Administration on Community Living or the Ohio Department of Aging. In addition, the AOoA may request additional data to track outcomes/outputs or changes in participant status.

Service Delivery

Please see the Appendices for service taxonomy, significant Ohio Administrative rules, and AOoA policies and procedures.

Requirements for all Nutrition Providers

Person Direction/Person Centeredness

Per Ohio Administrative Code (OAC) 173-4-04, the AOoA is procuring for person-directed nutrition services. Person-direction allows a consumer to decide what is best for himself/herself from a range of viable options. The AOoA defines person-direction to include:

- Allowing Congregate meal participants to decide when they would like to eat lunch rather than a set meal time. For example, an individual may eat lunch anytime between 11:30 am and 1 pm.
- Offering breakfast (morning) and/or dinner (evening) meals for Congregate meal participants, in addition to the lunch meal.
- Allowing Congregate meal participants to receive a meal without an advance reservation, and/or accommodating “walk-ins.”
- Serving traditional, hot meal on Thanksgiving and Christmas Days.
- Offering culturally appropriate meals for predominately African-American older adults at the J. Frank Troy Senior Center and Spencer Township Senior Center, as well as, meals for Asian Americans at the Asian Resource Center and a combination of Hispanic-Latino/African American Meals at the Mayores Senior Center.
- Offering a choice of food items within a meal, which could include choice of sides and/or entrée.

- Offering the choice of vegan/vegetarian option, lower-fat and lower sodium food alternatives for high fat and high sodium items, as well as, the choice of a lower carbohydrate dessert.
- Providing key nutrient information (i.e. calories, fat, sodium, carbohydrate) on a HDM menu or dining site menu board, which allows participants to make informed choices.
- Incorporating locally-grown fresh fruits and vegetables as an alternate to canned and frozen items.
- Offering a choice of dining formats. This includes serving meals on plates rather than trays; using wait staff to serve participants; and offering a delicatessen/café type dining service.
- Offering home delivered meal participants the choice of hot or frozen meals, choice of delivery time (morning or afternoon) and delivery frequency (daily or periodic).

Providers may incorporate other types of person-directed service into the nutrition program. However, provider is required to incorporate into nutrition services all of the person-direction included in their proposal.

Home Delivered Meal Assessment

Each potential HDM participant shall be assessed in his/her home to determine eligibility to receive HDMs and assess needs. Assessment shall be made within 10 working days after the request for service has been made and annually thereafter. An AOoA-approved assessment tool shall be used to assess potential HDM participants. The in-home assessment shall be done under the supervision of a Licensed Social Worker, Registered Nurse, Licensed-Registered Dietitian, or a professional approved by AOoA. Nutrition Providers may include this service in their home delivered meal unit rate or contract for a separate service, home delivered meal assessment.

Additional Responsibilities of Home Delivered Meal Provider

All meal providers are responsible for the following:

- Hiring, training and supervising dining site managers. Currently, some senior center staff are paid by the meal provider to serve as dining site managers but are not employees of the meal provider.
- Collection and reporting program income (participant donations)
- Completing monthly, quarterly and annual reports required by the AOoA.
- Service delivery data entry to include the collection and reporting of NAPIS information required by the Administration for Community Living.

Therapeutic Meals

A provider may offer therapeutic meals, medical food or food for special dietary use. The provider shall comply with OAC 173-4-06 if providing therapeutic meals.

Food Safety

The Ohio Department of Agriculture and/or the local health department has jurisdiction to monitor the provider's compliance with food-safety laws, including sanitation, food temperatures, thermometers, food-borne illnesses, packaging and dating meals. The provider will be responsible for maintaining the appropriate food service license.

Lucas County Congregate and/or Home-Delivered Meal Providers

Currently, congregate meals are being served at 18 dining sites within Lucas County. The AOoA is responsible for approving the opening and closing of all dining sites in Lucas County at which contracted congregate meals are served. The AOoA may open new sites during the contract period giving preference to persons with disabilities and veterans. Five dining sites are operated by three independent providers. The remaining dining sites and the majority of home delivered meals are provided by another provider, who rents the central kitchen located at 2121 Garden Lake Parkway, Toledo, Ohio 43614. Below is pertinent information related to contracting for this large program:

Equipment Rental

The central kitchen located at 2121 Garden Lake Parkway, Toledo, Ohio 43614 is where the vast majority of meals are prepared. Rent is in the amount of \$6,207/month.

Current Congregate Meal Sites, Serving Days, Participants Served thru the Central Kitchen

Meal Site	Location	Serving Days	Average Number Participants/Day
Chester Zablocki Senior Center	3015 LaGrange Toledo, Ohio 43608	Monday-Friday	20
Eleanor Kahle Senior Center	1315 Hillcrest Drive Toledo, OH 43612	Monday-Friday	33
J. Frank Troy Senior Center-Culturally Appropriate Meals	545 Indiana Ave. Toledo, OH 43604	Monday-Tuesday	55
Friendship Park Senior Center	2930 131st Street Toledo, OH 43611	Monday-Friday	11
James Hancock Senior Center	5760 Bayshore Road Oregon, OH 43616	Monday-Friday	22
Margaret Hunt Senior Center	2121 Garden Lake Parkway Toledo, OH 43614	Monday-Friday	25
Mayores Senior Center	One Aurora Gonzalez Road Toledo, OH 43609	Monday-Friday	Paused During Pandemic
Pinewood Place Apartments	1210 Collingwood Blvd. Toledo, Ohio 43604	Wednesday Evening	33
Renaissance Apartments	419 N. St. Clair St. Toledo, OH 43604	Monday-Friday	13
Sylvania Senior Center	7140 Sylvania Ave. Sylvania, OH 43560	Monday-Friday	21
The Commons at Garden Lake Veterans Apartments	1065 Garden Lake Parkway Toledo, Ohio 43614	Saturday Brunch	Paused During Pandemic

Meals Currently Not Provided Thru the Central Kitchen

Meal Site	Location	Average Number Participants/Day
Culturally Appropriate Meals at Asian Resource Center	Highland Park Shelter 1865 Finch St. Toledo, Ohio 43609	34 (2-3 days per week)
East Toledo Senior Center	1001 White St. Toledo, Ohio 43605	33
Maumee Senior Center	2430 S. Detroit Ave. Maumee, Ohio 43537	26
Senior Centers Inc.	2308 Jefferson Ave. Toledo, OH 43604	32
Culturally Appropriate Meals at Spencer Township Community Center	330 Oak Terrace Blvd Holland, OH 43528	37 (3 days per week)
Culturally Appropriate Meals at J. Frank Troy Senior Center	545 Indiana Ave. Toledo, OH 43604	135 (3 days per week)

Current Home Delivered Meal Participation

Zip Code	Approximate Number Hot Meals Served Per Month	Approximate Number Cold or Frozen Meals Served Per Month
43412	0	25
43434	0	50
43528	22	256
43537	0	581
43542	24	106
43558	0	182
43560	5	418
43566	0	116
43571	0	97
43604	520	1,435
43605	882	1,789
43606	541	858
43607	1,183	2,075
43608	617	1,028
43609	663	1,255
43610	335	344
43611	637	551
43612	846	613
43613	607	842
43614	444	828
43615	1,143	1,770
43616	63	826
43617	23	171
43620	335	894
43623		
Total		

Detailed Instructions:

Checklist-A checklist is provided to help ensure you have all the necessary items for the proposal.

Instructions for Completing *Request for Area Office on Aging Contract/Agreement OAA HCBS 2023-2026.*

<u>ITEM</u>	<u>COMMENTS</u>
Purpose of Request	Please be sure to check everything that applies. More than one category may apply in your request.
Applicant Agency: (Sponsor)	Place the legal name of the sponsoring Organization in this area.
Date:	Self-explanatory
dba Project Name:	Place the name of the project in this block (if different from the legal name of the sponsor).
Federal Tax I.D.:	Place the nine-digit Employer Identification Number assigned to the sponsoring organization by the Internal Revenue Service in this area.
Business Address:	Place the primary address where the Applicant Agency is located in this area.
Mailing Address:	Place the address where correspondence should be sent if different from the business address given.
Executive Director/Director/CEO:	Place the name of the Executive Director/Director/CEO to be contacted in the event questions arise regarding this application.
Phone Number & Email:	Self-explanatory.
For OAA Services to be provided:	Provide the services to be provided, the unit rate and the counties you intend to serve. Expand as necessary.
Total Amount Requested:	Provide Total Funding Requested and % Overall Agency Budget for January 1, 2023-December 31, 2023.

Caregiver Support & Plan4Home:	Please answer yes or no if you would like to be a provider for the Family Caregiver Support Program and/or Plan4Home. Please list the services, unit rates and counties served for Family Caregiver Support and Plan4Home contract. Expand field as necessary.
ARPA Application:	If you did not submit an ARPA application last year, please enter N/A. If you submitted an ARPA application last year and would like it included in this RFP, please enter Yes. If you submitted an ARPA application last year and do not want it included in this RFP, please enter No. ARPA funds are included in this RFP. This will just reduce the burden for bidders, who already submitted an application.
MPSC capital improvements, equipment, vehicle and/or infrastructure	Please list the type of project and the cost associated with it. For example, meal delivery vehicle \$80,000.
Total Additional Amount:	Lucas County Senior Services Levy Providers-Start-Up Service Cost.- Provide Total Additional Program Start-Up Funds Requested for PY2023. This funding should not be included in your unit rate. Pilot Program start-up costs should be included in the total pilot program cost.
Total Amount Pilot Program:	OAA Home and Community Based Services Program Applicants- Provide Total Funding Requested for Pilot Program for 2023. If the pilot program will not be implemented until January 1, 2024 or later, please indicate the timeframe for pilot program and total amount requested. Please indicate the counties you intend to serve.
Senior Center Accreditation:	This section only applies to senior centers seeking National Institute of Senior Centers (NSIC) Accreditation. Accreditation Fee: Please indicate <i>yes</i> or <i>no</i> if you are requesting funding for the National Institute of Senior Centers (NSIC) Accreditation Fee. Consultant thru AOoA: Please indicate <i>yes</i> or <i>no</i> if would like the AOoA to provide direct payment to a mentor or project manager to provide technical assistance for senior center accreditation.

Provider Subcontracted Consultant: Please indicate *yes* or *no* if you would like to subcontract with a consultant and are requesting reimbursement from the AOoA. Also, list funding amount requested.

Names, Signatures & Titles: Place the names, title and dates in the areas provided. The person signing in this section must have the legal authority to contract on behalf of the agency.

Program Narrative:

Organizational Capacity-All applicants should complete this section.

Service Delivery-Please answer questions for all the services for which you are requesting a contract. Please note there are questions specific to transportation and home delivered meals providers, as well.

Targeting Services and Person-Direction-please answer questions. Groups to be targeted and examples of person direction for meals is included in the background information.

Outcomes and evaluations-The AOoA may establish outcomes incentives. Regardless, all programs and services should include outcomes and evaluations to include targeting, satisfaction and impact. Please describe how this will be incorporated into service delivery.

Budget and narrative-Please complete the MS Excel Budget sheet for each service requested in the proposal.

- The Total Budgeted Expenses Should Match the Total Revenue
- You may leave a category blank if no expenses are associated with it.
- The budgeted Inkind Expenses should be the same as the Inkind Revenue.
- The AOoA provides 1 Wellsky Aging and Disability User License per provider. The cost is already entered as an expense and a revenue on the form.

Examples of in-kind contributions:

- volunteer services (a reasonable hourly rate applied to a volunteer's time multiplied by the number of hours he/she works). For example, advisory/grievance council members, kitchen help, servers, receptionist, HDM drivers.
- donated time of employees from other organizations (salaries or positions must not be supported by Federal funds).
- unpaid interns or fellows.
- donated supplies and loaned equipment.
- donated food from food banks, etc.
- donated utilities.

- donated or discounted space; and/or,
- transportation services to and from nutrition sites, medical appointments, shopping trips, etc. provided from non-federal sources.

In-Kind Guidance

- Volunteer time should be valued at the current minimum wage.
- Donated Services of professionals can be valued at an appropriate higher rate.
- Indicate whether donated equipment is actual value or rental value.
- Donated space can be valued at fair market rates.
- In-Kind resources represent the value of the non-cash resources provided by the applicant.
- To be claimed the value must be documented in project records, fair and reasonable, necessary to the achievement of the project's objectives and not included by any other federal or state-assisted program.

For Nutrition Providers, 15% match is required. For non-nutrition providers, match requirements are typically 25% new provider, 40% 2nd year provider and 100% 3+ year providers.

ARPA Title IIIB, IIIC1 and IIIC2 require a 15% match. Of, this 1/3 of the match for services must come from State sources. There are no match requirements for Title IIID.

For the ARPA Title III grant only, program income generated as a result of the ARPA Title III grant may be used to meet match requirements. Program income may only be used to meet the match requirement of the federal award in which the income is generated. Additional ARPA details are forthcoming from the Ohio Department of Aging. Program income may not be used for match for OAA funds.

Non-Federal match may include cash, expenditures by the grantee and third-party in-kind contributions. To be used as match, in-kind contributions must be from a third-party, verifiable and the records must show how the value of the in-kind contribution was determined. That valuation must be reasonable, subject to audit and meet the requirements of 45 CFR 75.306.

Calculating Match.

For this example, a provider is allocated \$100,000 OAA Title IIIC1 for congregate meal service.

$\$100,000 / 0.85 = \$117,647 - \$100,000 = \$17,647$ matching funds.

Please note: Appendix H contains the average unit rate for services provided in our region. Information Extracted from WellSky Aging and Disability Database by Ohio Department of Aging.

Sample Budget Form

On the next page is an example of how a budget might be completed. The figures were randomly selected for this example and not necessarily based on actual costs. Please remember to spread costs across services. For example, if rent is \$50,000 for the year and five services are equally provided in the location, then the budgeted cost for rent for each service is \$10,000.

Provider: Sample Meal Provider
Service Name: Congregate Meals
Program Year: January 1, 2023-December 31, 2023

EXPENSES	Budget
Salaries and Wages	\$100,000.00
Fringe Benefits	\$30,000.00
Travel and Training	
Staff Mileage	
Staff Professional License Fees	\$200.00
Facilities Rental/Lease	
Utilities	\$2,400.00
Trash/Recycling Removal	\$1,000.00
Janitorial	
Equipment (Maintenance)	\$1,000.00
Equipment (Replacement Reserve)	\$2,000.00
Raw Food Cost	\$70,000.00
Frozen Food Cost	
Catered Food Cost	
Disposable Products	\$1,000.00
Delivery Vehicle-Maintenance (meals)	
Delivery Vehicle-Replacement Reserve (meals)	
Gasoline Expense	
Professional Memberships/Dues	
Insurance	\$1,000.00
IT Equipment/Software	
Office Expenses	
Outreach	
Other	\$400.00
Wellsky Aging and Disability User License	\$425.08
Additional Wellsky Aging & Disability User License	
Inkind-Personnel	\$10,000.00
Inkind-Facilities	\$6,000.00
Inkind-Other	
Indirect administrative	
Total Budgeted Expenses	\$225,425.08

Revenue	Budget
Local Cash Match	\$39,780.90
Inkind-Personnel	\$10,000.00
Inkind-Facilities	\$6,000.00
Inkind-Other	\$0.00
Program Income	\$15,000.00
Gifts/Fundraisers	\$5,000.00
Wellsky License	\$425.08
AOoA Funds	\$149,219.10
Total Revenue	\$225,425.08

Proposed Units	15000
Proposed Unit Rate	\$15.03

Attachments:

Please reference the checklist for additional required documents.

Acknowledgement, Assurances, and Certifications:

Please complete and sign acknowledgements, assurances and certifications.

The Minority Agency Certification should only be completed if applicable.

Rating Criteria:

Rating Criterion of Proposals All proposals submitted will be evaluated on a point system. Points will be awarded based on the following table of criterion:

<u>CRITERION</u>	<u>CORRESPONDING SECTION(S) OF RFP</u>	<u>Maximum POINTS</u>
Previous successful experience in operating similar programs. Qualifications of bidder's personnel who will be providing the activity. Ability to leverage other funding	Organizational Capabilities	10
Completeness and quality of planned program's activities and services for older adults. Extent to which the proposed program's design incorporates services, including service gaps, to allow older adults to remain in their homes. Essential Services will be weighted more heavily.	Service Delivery	20
Extent to which the proposed program reaches target populations and addresses identified unmet needs.	Targeting Services	10
Organizations demonstrated efforts to reduce costs (unit rates) and/or create efficiencies through partnerships, MOUs, or subcontracting.	Collaboration	10
Extent to which the service delivery incorporates person direction. More points will be awarded for more person direction.	Person Direction/Person Centeredness	15
Bidder's plan to achieve goals, track consumers and meet performance standards.	Outcome and Program Evaluation	15
Reasonableness and necessity of proposed costs; efficiency and effectiveness of proposed use of funds. Bidder's administrative environment and fiscal responsibility. Competitive unit rate and required matching funds.	Budget	20
TOTAL POINTS		100
Pilot Program (Optional)-Recommend Supporting if Funding is available (Yes or No)		

- A. Total of 100 Points Possible - Must Score 70 or More Points to Qualify. Proposals receiving less than a score of 70 points will not be considered.