



**REQUEST FOR PROPOSALS
GUIDELINES AND APPLICATION
INSTRUCTIONS**

**Title III Funding
Older Americans Act**

Fiscal Year 2023

**Applications due on or before Friday,
April 29, 2022 by 4 p.m.**

REQUEST FOR PROPOSALS
Title III Funding under the Older Americans Act
Fiscal Year 2023

Release Date: February 22, 2022

Senior Resources Agency on Aging is a private, not-for-profit corporation, established in 1974. Its mission is to provide access to information and services to empower adults to live with dignity.

As a designated Area Agency on Aging, Senior Resources is a pass-through funding source for federal and state dollars for the elderly in the fifty-six town region of Eastern Connecticut. Senior Resources awards contracts to community agencies to provide supportive services for community adults aged 60 and older through an annual Request for Proposals process. Funding support services such as in-home, legal, health, adult day care, respite, transportation, outreach and social support.

Senior Resources Agency on Aging regards as a privilege its responsibility to engage in a process of entertaining applications from agencies which have designed programs to serve persons aged 60 and older and their families using Title III funds available under the Older Americans Act for the fiscal year 2023.

We welcome a cooperative relationship with participating agencies. Your responsibility is to provide a specified service to eligible persons; ours is to provide support and oversight. Together our aim should be to provide a continuity of efficient, creative services. For the current period the primary objectives of these services should be in accord with the objectives as summarized in the Area Plan Objectives which can be found starting on page 7 of this document.

IMPORTANT DATES

March 4, 2022	LETTER OF INTENT (mandatory) due by 4 p.m. through email only (kchase@SeniorResourcesEC.org)
Ongoing	Technical assistance by email (kchase@SeniorResourcesEC.org), phone (860-887-3561 ext 113), or Zoom by appointment
March 18, 2022	DRAFT (mandatory) applications and budgets due by email (kchase@SeniorResourcesEC.org) by 4 p.m.
April 29, 2022	FINAL applications and all attachments must be received no later than 4 p.m. Please read instructions for submittal procedures.
June 2, 9, 16, 2022	Applicant presentations to Allocations Committee
September 22, 2022	Grantee Orientation – Senior Resources – 10 a.m. – 11:30 a.m.
October 1, 2022	FY2023 begins

SENIOR RESOURCES WEBSITE RESOURCES:

The following documents are available on Senior Resources website (www.SeniorResourcesEC.org/about-us/funding-opportunities) in the section found at the top of the page entitled "About Us" then subsection "Funding Opportunities":

- Senior Resources Title III Program Policies and Procedures Manual
- 2012 Census Information NASUAD-Muskie Connecticut Demographic Profile
- Map of Senior Resources Planning and Service Area
- 2022 Poverty Guidelines
- MIS Service Definitions 2021
- Community Services Policy Manual
- Senior Resources Area Plan

GENERAL INSTRUCTIONS

Senior Resources has updated the Title III Proposal format. Please read all instructions carefully.

A. Eligibility

1. Public, incorporated private 501(c)3 non-profit, and private, for-profit agencies in good standing with the office of the Connecticut Secretary of State that provide service within Senior Resources' fifty-six town area (see map at www.SeniorResourcesEC.org/about-us/funding-opportunities) are eligible;
2. Before awarding contracts to for-profit agencies, Senior Resources must obtain approval from the State Unit on Aging; and
3. Only services described on the MIS Service Definitions 2021 List (available at www.SeniorResourcesEC.org/about-us/funding-opportunities) are eligible for funding.

B. Letter of Intent

1. The approved non-binding Letter of Intent must be submitted by email (kchase@SeniorResourcesEC.org) no later than 4 p.m. **Friday, March 4, 2022.**

C. Technical Assistance

1. Technical assistance needed to complete a comprehensive application can be provided by phone, email, or Zoom by appointment. Contact Kathy Chase, Director of Contracts, by email (kchase@SeniorResourcesEC.org) to schedule an appointment.

D. Application Preparation

In preparing your application see the requirements of the Older Americans Act on page 9 for guidelines for program management. In addition:

1. All applicants must specifically address one or more of the service categories listed on page 6;

2. All applications must relate to one or more of the Senior Resources Agency on Agency Priority Areas and Objectives as outlined in the Area Plan Objectives starting on page 7;
3. Services must target adults age 60 years and above. Targets should be representative of the area's older population according to the most recent U.S. census. Census data for eastern Connecticut is available at www.SeniorResourcesEC.org/about-us/funding-opportunities;
4. Recognize that priority is given to programs which emphasize services to older persons with the greatest economic (an income level at or below the poverty line) or social need (caused by non-economic factors which include physical and mental disabilities, language barriers and cultural, social or geographical isolation) as defined in the Older Americans Act of 1965 as amended in 2020;
5. All Senior Resources funded programs must be located in or provide services to one or more of the 56 localities in the Senior Resources Planning and Service Area;
6. The project period is October 1, 2022 through September 30, 2023. Be sure that your project description, goals, target services and clients, and budget all describe the specific project and time frame for which you are seeking funding;
7. Please review section 200.00 through 206.00 "Application and Review Procedures" in the Senior Resources Agency on Aging Title III Program Policies and Procedures Manual; this is available at www.SeniorResourcesEC.org/about-us/funding-opportunities;
8. Applicants are responsible for familiarizing themselves with (1) Senior Resources Agency on Aging Title III Program Policies and Procedures Manual (2) the Older Americans Act (3) the Senior Resources Area Plan and (4) appropriate State and Federal Regulations; all located at www.SeniorResourcesEC.org/about-us/funding-opportunities; and
9. Unless otherwise noted, all approved programs must begin services on October 1, 2022.

E. Financial criteria

1. Funds cannot be used to replace existing non-federal sources;
2. All Title III funded projects must include matching funds from non-federal sources. Carefully review the non-federal match and declining funding formula policies in the Policies and Procedures Manual for Title III contracts. Match percentages are calculated based on the net project cost;
3. Matching funds or resources must not be obtained from other federal funding sources with the exception of Community Funds and may not be used to match any other federal funds;
4. All applicants must submit a financial audit for the previous fiscal year. Any agency required to obtain a state or federal single audit must also submit those reports; and
5. Any costs incurred by the potential recipient prior to an award by Senior Resources are not reimbursable.

F. Draft Period

A draft copy of the application is mandatory in order to assure that budgets and other aspects of the application are technically accurate before submittal to the Board of Directors for review. Staff will be available for technical assistance on an as-needed basis. New applicants are strongly urged to call the office to set up an appointment for technical assistance.

Once draft copies of the applications have been reviewed by staff, applicants will be notified of necessary changes or revisions. **DO NOT SUBMIT FINAL DOCUMENTS UNTIL AFTER THE DRAFT HAS BEEN REVIEWED AND YOU ARE NOTIFIED BY SENIOR RESOURCES – AGENCY ON AGING STAFF TO DO SO.**

1. A mandatory draft of the application and budget is due by email (kchase@SeniorResourcesEC.org) no later than close of business (4 p.m.) on **Friday, March 18, 2022**.

G. Final Format and Submission

1. Use only the approved application format and budget that may be downloaded at: www.SeniorResourcesEC.org/about-us/funding-opportunities;
2. Email all of the attachment items in the order listed on page 14. The state and federal audit should be separate attachments;
3. Submit:
 - one original copy of application (in pdf format), budget (in Excel format) and attachments (do not put application and budget in the same attachment. They must be the pdf and excel formats);
 - email to kchase@SeniorResourcesEC.org. **Do not** put the budget into a pdf format.
4. Sign and date the application cover sheet;
5. Faxed or paper copies will **not** be accepted. The original must be received by the deadline;
6. It is strongly recommended that all documents be emailed with a return receipt requested;
7. Omission of requested information or the submission of incomplete material may remove a proposal from further consideration; and
8. Final applications must be received no later than **4 p.m. on Friday, April 29, 2022** at:
kchase@SeniorResourcesEC.org

H. Proposal Reviews

1. Proposals are sought on a competitive basis for projects beginning October 1, 2022;
2. All contracts will be subject to the availability of funds;
3. Reviews are based on the quality of the proposed project in relation to Senior Resources' priority funding areas. Reviews will be made by the Allocations Committee which is comprised of members of the Board of Directors and Advisory Council;
4. All applicants are required to make a brief presentation to Senior Resources Allocations Committee. Three Thursdays in the month of

June have been set aside for this purpose. Applicants will be notified of the date and time for their review;

5. The Board of Directors will make funding decisions at the end of June. Senior Resources will notify each applicant in writing within twenty (20) business days after the decision of the Board of Directors, that its proposal has been approved or denied; and
6. If Senior Resources is interested in a proposal but cannot fund it completely, partial funding may be awarded. At a minimum, revised budget forms and targets will be requested after such awards.

I. Monitoring

1. All contracts that are awarded will be monitored by Senior Resources as required by the federal government;
2. Monitoring includes an annual on-site visit, monthly statistical and financial reports, a year-end report, and additional reporting as necessary; and
3. Agencies are required to conduct client surveys that measure the impact receiving the Title III service has made on them. A compilation and plan of action report is required.

J. Appeals

Appeals may be filed only on the claim that Senior Resources funding policy was not followed. A request for appeal must be sent via registered mail or delivered in person to 19 Ohio Avenue Suite 2 Norwich, CT 06360 within ten (10) business days of the dispatch date of Senior Resources' notification. Further details of the appeals process may be found in the Senior Resources Agency on Aging Title III Policies and Procedures Manual available at www.SeniorResourcesEC.org.

PROVISO: Senior Resources reserves the right to reject any and all proposals, or portion thereof, received as a result of this request, or to negotiate separately with any source in any manner necessary to its best interest or to cancel the request for proposal if it is in the best interest of Senior Resources to do so. Submission of an application does not commit Senior Resources to award a contract or to pay costs incurred in the preparation of a proposal under this request or to procure a contract for services or supplies.

TITLE III MANAGEMENT INFORMATION SYSTEMS (MIS):

Early estimates of Federal and State funds available for FY 2023 listed below are subject to change following approval of Federal and State budgets.

Service Categories

<p>Supportive Services: <u>TITLE III-B</u></p> <p>\$673,486.00 (estimate)</p>	<ol style="list-style-type: none"> 1. <i>Access Services.</i> Helping seniors gain access to available services through benefits counseling, benefits education, case management, employment counseling, energy related assistance, housing counseling, information and assistance, language translation, outreach, assisted transportation, medical transportation and transportation, etc. 2. <i>Adult Day Care.</i> 3. <i>Legal Services.</i> 4. <i>In-home Services.</i> Chore, companion, friendly visiting, home health aide, homemaker, hospice, personal care worker, personal emergency response and personal reassurance, etc. 5. <i>Health and Dental Services.</i> Chronic disease management, dental, fall prevention, health assessments, health counseling, health education, health screening/clinic, medical visit, medication management, mental health counseling, mental health screening and referral, nursing visits, physical activity, social support services, temporary inpatient care – institutional, temporary inpatient care – non-institutional, therapeutic activity, etc. 6. <i>Other Community Services.</i> Continuing education, direct volunteer services, employment assistance, family life education, food buying club, food pantry, foster care, home repair & renovations, home safety assessment, housing alternatives, money management, personal assistance credits, public education, recreation, senior center use, shopping services, training, volunteer opportunities, weatherization, etc.
<p>Evidence Based Health Promotion Programs: <u>TITLE III-D</u></p> <p>\$52,671 (estimate)</p>	<p>All Title III D funded programs must replicate programs that meet the Administration for Community Living’s (ACL) highest-level criteria for evidence-based programs that have:</p> <ul style="list-style-type: none"> • Undergone experimental or quasi-experimental design; and • Attained the level at which full translation has occurred in a community site; and • Attained the level at which dissemination products have been developed and are available to the public. <p>For further information and a list of acceptable programs go to http://www.ncoa.org/, or http://www.acl.gov</p>

AREA PLAN OBJECTIVES

LONG TERM SUPPORTS AND SERVICES

Goal: Empower older individuals to reside in the community setting of their choice

Objective 1:

Older Americans Act funds support projects that foster independence and aging-in-place.

Objective 2:

Provide timely, accurate and concise information that clearly describes options for community-based care.

Objective 3:

Partner with regional Area Agencies on Aging to deliver and improve the customer/caregiver experience when seeking supports.

Objective 4: Utilize state and federal funding to support older adults while waiting for eligibility in Medicaid home and community-based services.

Objective 5:

Provide multi-lingual services and topics such as CHOICES, I & A, NFCSP, CDSMP, CSRCP, CHSP, Elder Rights and Nutrition Education and Counseling to support access for non-English-speaking adults.

Objective 6:

Provide strategic outreach for services and topics such as CHOICES, I & A, NFCSP, CDSMP, CSRCP, CHSP, Elder Rights and Nutrition Education and Counseling to, 1) rural; 2) low-income; 3) minority; 4) at-risk of institutionalization; 5) persons with Alzheimer's disease or related dementia; 6) persons with severe disabilities.

HEALTHY AGING

Goal: Provide Older Adults with Prevention and Wellness Opportunities

Objective 1:

Broaden access to and awareness of Chronic Disease Self-Management Programs and other evidence-based programs to promote holistic health and wellness.

Objective 2:

Use multi-faceted approaches addressing food insecurity and malnutrition.

Objective 3:

Support populations at greatest risk of adverse health outcomes due to social determinants of health.

Objective 4:

Implement Enhanced Business Acumen which leads to beneficial relationships with health care entities.

Objective 5:

AAA-CT enhance statewide responses in the event of future Major Disaster Declarations.

ELDER RIGHTS

Goal: Protect elder rights and well-being and prevent elder abuse, fraud, neglect, and exploitation

Objective 1:

Enhance protection of vulnerable older adults through Older Americans Act Programs such as legal services.

Objective 2:

Provide strategic outreach on elder abuse, fraud, neglect, and exploitation.

OLDER AMERICANS ACT REQUIREMENTS

1. All projects must provide Senior Resources with statistical and other information necessary in order to meet its established planning, coordination, evaluation and reporting requirements.
2. All projects will afford older persons the opportunity to contribute for all or part of the costs of the project's services. All projects will inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary.
3. The Contractor is accountable to Senior Resources for income generated by Title III supported activities. Records of the receipt and disposition of program income must be maintained by the Contractor in the same manner as required for the Title III funds that gave rise to the income.
4. All projects will use all collected contributions to expand the service for which the contributions were given and to supplement (not supplant) funds received.
5. Projects shall not means test for any service for which contributions are accepted.
6. All projects must protect the privacy and confidentiality of each older person with respect to his or her contributions.
7. All projects must establish appropriate procedures to safeguard and account for all contributions.
8. Projects may not deny any eligible person a service because the person will not or cannot contribute to the cost of the service.
9. With the consent of the older person or his or her representative, projects will bring to the attention of appropriate officials for follow-up, conditions or circumstances which place the older person, or the household of the older person, in imminent danger.
10. Where feasible and appropriate, projects will make arrangements for the availability of services to older persons in weather related emergencies.
11. Projects will assist participants in taking advantage of benefits under other programs.
12. Projects will assure that persons age 60 or over who are frail, homebound by reason of illness or incapacitating disability, or otherwise isolated, shall be given priority in the delivery of services.
13. Projects will assure that the proposed project intends to satisfy the service needs of older eligible individuals with greatest economic needs and older individuals with greatest social needs (with particular attention to low income older individuals, including low income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas).

PUBLIC NOTICE
PROGRAM DEVELOPMENT AND COORDINATION

Notice is hereby given that Senior Resources, 19 Ohio Avenue Suite 2, Norwich, CT 06360 will request a waiver from the State of Connecticut, Unit on Aging for the following:

- National Family Caregivers Program;
- Information and Referral Services;
- Nutrition Services – Education and Counseling;
- Chronic Disease Self-Management; and
- Congregate Housing Services Program.

The period of service will be October 1, 2022 through September 30, 2023.

Costs covered will include: staffing, postage, office supplies, and telephone. Funding will be provided under Title III B and D of the Older Americans Act. The cost of these services will have no impact on the overall delivery of Title III funded services.

Public comment on this waiver request will be accepted through March 18, 2022. Please send all comments to Senior Resources, 19 Ohio Avenue Suite 2, Norwich, CT 06360.

FUNDING INFORMATION

The Senior Resources Agency on Aging is issuing this grant application packet for Title III funds of the Older Americans Act for services to be delivered during Federal Fiscal Year 2023.

Senior Resources will entertain applications from agencies that have designed programs to facilitate accessibility to and utilization of the current service system. Successful programs will use available resources efficiently and with a minimum of duplication.

All contracts will be a reimbursement based contract and are subject to the availability of funds.

There are two sources of funding under Title III. Title III B is earmarked for supportive services and senior centers. Title III D is targeted for evidence based health promotion programs (see www.ncoa.org www.acl.gov for acceptable evidence based programs).

TITLE III FUNDING SPECIFICS

TITLE III B Supportive Services

Title III B is for the planning and the provision of supportive services and multipurpose senior centers in order to:

- Secure and maintain maximum independence and dignity in a home environment for older individuals capable of self-care with appropriate supportive services,
- Remove individual and social barriers to economic and personal independence for older individuals,
- Provide a continuum of care for vulnerable older individuals, and
- Secure the opportunity for older individuals to receive managed in-home and community based long term care services.

Supportive Services are defined as:

1. Health (including mental health), education and training, informational, recreational, homemaker, counseling, or referral services;
2. Transportation services to facilitate access to supportive services or nutrition services in conjunction with local transportation service providers, public transportation agencies, and other local government agencies that result in increased provision of such transportation services for older individuals;
3. Services designed to encourage and assist older individuals to use the facilities and services (including information and assistance services) available to them, including language translation services to assist older individuals with limited English speaking ability to obtain services under this title;
4. Services designed to assist older individuals in avoiding institutionalization and to assist individuals in long-term care institutions that are able to return to their communities, including:

- (A) Client assessment, case management services, and development and coordination of community services
 - (B) In-home services and other community services, including home health, homemaker, shopping, to assist older individuals to live independently in a home environment
5. Services designed to provide to older individuals legal assistance and other counseling services and assistance, including—
 - (A) Tax counseling and assistance, financial counseling, and counseling regarding appropriate health and life insurance coverage
 - (B) Representation —
 - of individuals who are wards (or are allegedly incapacitated)
 - in guardianship proceedings of older individuals who seek to become guardians, if other adequate representation is unavailable in the proceedings
 - (C) Provision of counseling to older individuals who provide uncompensated care to their adult children with disabilities, to assist such older individuals with permanency planning for such children
 6. Services designed to enable older individuals to attain and maintain physical and mental well-being through programs of regular physical activity, exercise, music therapy, art therapy, and dance-movement therapy;
 7. Services designed to provide health screening (including mental health screening) to detect or prevent illnesses that occur most frequently in older individuals. (If the applicant wants to provide a behavioral health service that is not listed, it can be open for discussion);
 8. Services designed to provide preretirement counseling and assistance in planning for and assessing future post-retirement needs with regard to public and private insurance, public benefits, lifestyle changes, relocation, legal matters, leisure time, and other appropriate matters;
 9. Provision of services and assistive devices (including provision of assistive technology services and assistive technology devices) which are designed to meet the unique needs of older individuals who are disabled, and of older individuals who provide uncompensated care to their adult children with disabilities;
 10. Services to encourage the employment of older workers, including job and second career counseling and, where appropriate, job development, referral, and placement, and including the coordination of the services with programs administered by or receiving assistance from the Department of Labor, including programs carried out under the Workforce Investment Act of 1998 (29 U.S.C. 2801);
 11. Health education services, including information concerning prevention, diagnosis, treatment, and rehabilitation of age-related diseases and chronic disabling conditions;
 12. Services designed to enable older individuals with mental impairment to attain and maintain emotional well-being and independent living through a coordinated system of support services;
 13. In-home services for frail older individuals, including individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction, and their families, including in-home services.

TITLE III D Evidence Based Health Promotion Programs

Evidence-based programs offer ways to promote health and prevent disease. These types of programs are based on research. Evidence-based programs are tested program models or interventions that provide practical, effective community programming that can provide proven health benefits to participants.

Program Criteria

Title III D is for evidence-based programs of the highest-level criteria only which must meet one of the following:

1. The Program is recognized as evidence-based by one of the following authorities on healthy aging or by the State Unit on Aging:
 - The National Council on Aging – www.ncoa.org
 - The Centers for Disease Control – www.cdc.gov/aging
 - Administration for Community Living – www.acl.gov
2. The Program has undergone experimental or quasi-experimental design
3. The Program has been fully translated into a community setting
4. Dissemination products have been developed and are available to the public

The Fiscal Year 2023 funds under Title III D are available to provide disease prevention and health promotion services and information at multipurpose senior centers or other appropriate sites. Examples of some evidence-based programs are: Matter of Balance, the Chronic Disease Self-Management Program, Tai Chi, Moving for Better Balance and Fall Prevention Programs to name a few.

The funds shall not be used to cover services for which payment may be made under Title XVIII of the Social Security Act (Medicare).

INSTRUCTIONS FOR COMPLETING THE APPLICATION

Read the instructions carefully **before** completing the application. Applications that are incomplete or submitted late may be rejected with no right of appeal. Be concise and limit the application to requested length. It is necessary for all applicants to use the required application and budget forms available on the Senior Resources website (www.SeniorResourcesEC.org/about-us/funding-opportunities).

PROGRAM DESCRIPTION AND WORK PLAN

Each application should address only one service category; ie. Access, In-Home, Adult Day Care, Legal, Other Community Services, Health/Dental and Evidence Based Health Promotion Services. See MIS Service Definitions 2021 at www.SeniorResourcesEC.org/about-us/funding-opportunities for approved services and service categories.

Read and answer each question in the space provided.

The person who is legally authorized to bind the Applicant Agency, (ie. Board President or Treasurer) should sign this application.

The submission must contain all of the following items in the order listed below:

Program Description and Work Plan
Budget
Attachments (in separate attachments)
a. Standard Assurances – with original signature
b. State and Federal Financial Audits (including Management Letter)
c. Current Copy of Insurances (Certificate of Insurance that shows all): Liability, Workman's Compensation, Vehicle and Property
d. Proof of non-profit status (if applicable)
e. Certificate of Fire Safety Regulations (if appropriate)
f. Job Descriptions for all Staff Listed on Personnel Page
g. Board of Director's List
h. Agency Budget – if Costs are Shared Among Programs
i. Letters of Support with partnering agencies (if applicable)
j. Letter(s) of understanding for subcontracts
k. Organization Chart
l. Federally negotiated Indirect Cost rate document if admin dollars exceed 10%
m. Certificate of Non-Federal In-Kind Match – completed by <u>each donor</u> , <u>not</u> the applicant

Any material beyond the required pages will be deleted, regardless of content.

BUDGET

FUNDING DOCUMENTATION TAB

BUDGET SUMMARY

These numbers will drop in automatically from the budget.

DOCUMENTATION OF FUNDING SOURCES

NOTE: Complete this page after the Total Program Budget is complete.

Other Cash – list the source and amounts of any additional resources used to support the program, such as: town funds, fundraising, etc.

Non-Federal Cash Match – list the source and amounts of each non-federal cash used to match Title III funds.

Non-Federal In-Kind Match – for each line item listed as in-kind (goods or services from a third party) on Line Item Budget, explain how its valuation was computed on Budget Narrative using the following considerations: if in-kind match in whole or in part are personnel, list in-kind staff on Personnel Page. (A Certificate of Non-Federal In-Kind Match must be included with the attachments and signed by the donor).

Donated Services:

- Volunteer services should be valued at rates consistent with those ordinarily paid for similar work in the applicant agency. If this does not apply, the services should be valued at rates consistent with those paid by other employers for similar work in the same labor market.
- For donated services, list hourly rate, number of hours and purpose of donated service to be provided to the project.

Donated Space, Equipment and Supplies:

- These shall be valued at the market rate. A signed Certificate of Non-Federal In-Kind Match must be included with the attachments and signed by each donor, NOT THE APPLICANT.

PERSONNEL TAB

List all paid personnel associated with the proposed program.

1. For each paid position:
 - a. Enter total annual salary for each position that works on this program
 - b. Enter total hours per week that each position works on the proposed program
 - c. Enter amount being paid for each salary in the appropriate funding source(s)

2. For each in-kind position:
 - a. Enter total hours per week and weeks per year which will be allocated to the Title III program
 - b. Enter the value of each in-kind salary
 - c. A Certificate of Non-Federal In-Kind Match must be included with the attachments and signed by the volunteer.

TOTAL PROGRAM BUDGET TAB

Enter the Organization's Name at the top of the page.

Matching funds or resources for Title III funds must not be obtained from other federal funding sources with the exception of Community Development Block Grants.

MATCH REQUIREMENTS

Matching Requirements are as follows:

- | | |
|----------|---|
| 1st year | 85% Senior Resources funding
15% non-federal cash and/or in-kind resources |
| 2nd year | 80% Senior Resources funding
20% non-federal cash and/or in-kind resources |
| 3rd year | 75% Senior Resources funding
25% non-federal cash and/or in-kind resources |

Cash or in-kind resources to be used as match must be documented in writing. If an agency is to provide such match, this must be documented in writing by the donor agency. Personnel match must be documented based upon actual rate of pay for a particular position. Building space must be documented in terms of the actual rental value of comparable space by a real estate agent, or based on actual rent paid.

Non-federal resources may be included as part of the grantee's matching cost only when they:

- Are documented by signed vouchers,
- Are not used to match any other federally assisted programs,
- Are allowed costs and are clearly necessary to the operation of the program (e.g. if the service or property was not donated, the applicant would have to pay for it in order to operate the program),
- Are not paid for by any other federal program, and
- Are from a non-federal source with the exception of Community Development funds

DISTINCTION BETWEEN CASH MATCH AND IN-KIND MATCH

Cash match is cash from non-federal sources needed for the operation of the proposed program. In-kind match (or in-kind contributions) refers to property or services which benefit the program and are contributed by non-federal third parties without charge to the program. A Certificate of Non-Federal Match is to be included with the attachments and signed by each donor.

DETERMINATION OF FEDERAL REQUEST

To determine how much federal cash can be requested, first estimate the net cost, including in-kind resources. Assuming that the net cost is \$20,000, the maximum amount of federal share would be 85% of \$20,000, or \$17,000. The remaining \$3,000 may be either non-federal cash or in-kind. **You are not required to have in-kind in the budget.**

Second year applicants may request up to 80% of the net cost. The 20% balance may be either non-federal cash or in-kind.

Third year applicants may request up to 75% of the net cost. The 25% balance may be either non-federal cash or in-kind.

Determination of final funding allocation will be based, in part, upon necessary and reasonable costs and past performances.

AGENCY BUDGET

If there are shared costs between the proposed program and other agency operations or programs, submit an agency budget for the same year as the proposed program. This budget should itemize how shared costs were derived. Itemization should be presented in narrative form. Agency budgets are to be included with attachments.

LINE ITEM BUDGET SPECIFICS

This budget page reflects only the costs associated with the program for which Title III funds are requested.

Project costs should be shown as Title III (Column A), Non-Federal Cash (Column B), Non-Federal In-Kind (Column C), Other Cash (Column D), Client Donations (Column E), and then a Total of these in Column F.

TITLE III: This column is to reflect costs being paid out of the Title III funds requested from Senior Resources.

NON-FEDERAL CASH MATCH: This column is to reflect costs being paid out of the non-federal cash match.

NON-FEDERAL IN-KIND: This column reflects property or services that benefit the program and are contributed by non-federal third parties (not the applicant agency) without charge to the program.

OTHER CASH: This column reflects costs being paid out of all other sources of funding not used as match, such as, town funds, fundraising, etc.

CLIENT DONATIONS: This column reflects costs being paid out of client donations.

TOTAL: Add columns A – E to total across.

ADMIN COSTS AND DIRECT SERVICE COSTS: The total of each line item should be broken down into either ADMINISTRATIVE COSTS (Column G) and/or DIRECT SERVICE COSTS (Column H). **Columns G (Admin Costs) and H (Direct Service Costs) must total column F (Total)**. Direct service costs are those that can be specifically identified to the delivery of service to the client. Administrative costs are costs incurred for the common purpose of benefiting more than one activity and not directly assignable on an equitable basis without some underlying allocation rationale. Costs that involve arbitrary decision-making or require efforts disproportionate to benefits derived shall be classified as administrative.

ADMINISTRATIVE COSTS (INDIRECT COSTS) ARE NOT TO EXCEED 10% OF THE TOTAL PROGRAM COSTS.

Federally Negotiated Indirect Cost Rate: A rate utilized to calculate indirect costs (administrative costs) based on documentation submitted to and approved by a Federal awarding agency.

If an item is not reflected, use the “Other” category, noting the purpose of the expense in the budget narrative.

ROUND ALL FIGURES TO THE NEAREST DOLLAR THROUGHOUT THE BUDGET.

BUDGET NARRATIVE TAB

For each line item on Line Item Budget, provide a concise explanation of how the cost was derived. **Round all figures to the nearest dollar.** Denote all in-kind explanations with an asterisk (*). If more than one program shares the expense, indicate the total cost and explain how the proposed program’s share of the cost was derived.

FRINGE: list each benefit separately and the percentage of each benefit. Benefits include FICA (social security and Medicare), Workman’s Compensation, Health Insurance, and Annuity. List any other benefits. If all staff does not receive the same amount of fringe, explain in the space provided.

TRAVEL: note the number of miles to be driven and the cost per mile.

RENT: indicate square footage and cost per square foot per year. Note if any utilities are included in the rental cost.

TELEPHONE: specify the base rate and estimate the amount to be spent per month on calls for the program.

UTILITIES: compute each utility cost.

VEHICLE OPERATIONS: Calculate the cost of operating vehicles (gas and oil) charged to this service component. Do not use this line item for major repairs or tune-ups. Explain how this cost was derived.

EQUIPMENT: Equipment is defined as non-expendable property which has a useful life of more than one year and cost \$1,000 or more. Itemize type of equipment and estimated cost. **Equipment purchased wholly or in part by Title III funds must be listed on the inventory form and must be tracked as Title III equipment on a yearly basis until the life span of the equipment expires.**

REPAIRS/MAINTENANCE: Calculate costs of repairs/maintenance to office/program space or vehicles.

CONFERENCE/TRAINING: Calculate all costs associated with attendance of professional conferences and/or training charged to this component.

CONTRACTUAL SERVICE: If you plan to subcontract any part of this project, provide the following information:

- a. Name of subcontractor
- b. Activity to be subcontracted
- c. Cost

Include a copy of each proposed subcontract as an attachment with the original application only.

INSURANCE: List total cost, percentage charged to the proposed program, and how this percentage was derived.

POSTAGE: Explain how estimated cost was calculated.

SUPPLIES/PRINTING: Office Supplies refer to consumable office items with a useful life of less than one year. Other Supplies may include medical, dental and site supplies. Explain how estimated cost of each item was calculated.

DUES/SUBSCRIPTIONS: Calculate the cost of allowable membership dues and subscriptions charged to this service component. Explain how this cost was derived.

AUDIT: Note the total cost and the charge to the proposed program, describing how it was derived, and the percentage of the total cost.

OTHER: Itemize and explain the cost of any items not included above.

PLEASE DOUBLE CHECK ALL FIGURES! BE CERTAIN THAT ALL FIGURES TOTAL CORRECTLY. BE SURE THAT THE FIGURES IN THE NARRATIVE CORRESPOND TO THE LINE ITEM BUDGET, THE BUDGET SUMMARY AND THE FACE PAGE.

SERVICE TARGETS TAB

There are specific individual population groups which have been identified through the legislative process as being necessary service targets. The following groups have been identified in this context:

1. Individuals at or below 100% of the federal poverty limit;
2. Minority individuals;
3. Low income minority individuals;
4. Individuals at 101% - 149% of the federal poverty limit;
5. Individuals living in rural areas;
6. Individuals of limited English proficiency;
7. Individuals with severe disabilities;
8. Individuals at risk of institutionalization; and
9. Individuals with Alzheimer's and related disorders

Service Targets - For each service proposed for FY23, indicate the service name in the left column. This information is provided in the Reference Material entitled "MIS Service Definitions 2021" located at www.SeniorResourcesEC.org.

2023 Target – Set targets for each of the above-mentioned categories. The NASUAD census is available at www.SeniorResourcesEC.org for use in setting targets:

Units of Services – Estimate the number of units that will be provided to all clients during the program period. Be sure to use the unit of service (hour, day, one visit, etc.) that is specified in the Service Definitions in the Reference Material provided on the Senior Resources website. [For example, case management units are "One Hour"]

Unduplicated Clients – Estimate the total number of clients to be served during the program period.

The unduplicated client figure must be broken down among the target populations. Ex: If there are 200 clients targeted for a particular service, how many of those 200 will belong in the low-income category, how many belong in the minority category, etc. Note: The low-income minority target number cannot be larger than the minority number as it is a subset of the minority client figure. Ex: If you plan to serve 10 minority clients, you can't serve 12 low income minority clients.

UNIT COST TAB

Determine unit cost for each category being reported on MIS.

Column A – The service name for each MIS category recorded on the Service Target page of this application will enter automatically.

Column B – Show the unit of measure for the service type that is stated in the reference material supplied with the application. (Reference Material Pages) Only units stated will be accepted. (Ex: One Hour, Session, One Way Trip, etc.)

Column C – The total units proposed for 2023 will enter automatically.

Column D – From the budget, determine the net costs associated with each service type. Net costs are to include Title III (column A from page 14), non-federal cash match (column B from page 14), and non-federal in-kind match (column C from page 14) only. Do not include other cash or client donations.

Column E – This will be done automatically.

Column F – From the budget, determine the total Title III (column A from page 14) costs associated with each service type.

Column G – This will be done automatically.

Column H – This will be done automatically.