AGENDA ITEM or FINAL CONTRACT REVIEW SUBMITTAL FORM

Gunnison County Legal Instrument # _____

Date of Request:	3/19/2013	**Contractual Deadline:**	3/19/2013	**Received in Administration:**	3/21/13
Desired Agenda Date:	asap	**Amount of Discussion Time Desired:**			
Action Requested:	County Manager signature on Region 10 Area Agency on Aging funding request for Senior Resources Office				
Parties to the Agreement:	Region 10 AAA and Gunnison County				
Term Begins:	7/1/2013	**Term Ends:**	6/30/2014	**Grant Contract #:**	

Summary: Region 10 Area Agency on Aging funding request for Senior Resources Office for Information and Assistance services

Recommendation: Sign request for funding

Fiscal Impact: $33,000 for Sr Resources

Submitted by: Karin Stewart **Return To:** Karin Stewart

Finance Department Review: (●) Required ( ) Not Required

Comments: Same Grant Award, cash and inkind match as current year budget.

Signature 3/25/13 Discharge Date

County Attorney Review: ( ) Required (●) Not Required

Comments:

Certificate of Insurance Required

Yes ____ No ____ Initials ____

Signature Discharge Date

Returned to Administration: 3/25/2013 **Original Returned:** K. Stewart 8/27/13

County Manager Approval:

Signature 4/2/13 Date 3-25-13

(X) Consent Agenda ( ) Regular Agenda Time Allotted: _____

(A)

Revised January 2011

ATTACHMENT A

Region 10 Area Agency on Aging Funding Application

Title of Project: Senior Resources Office (Information and Assistance)

Organization (name, address, phone, fax and email):	Project Director (name, address, phone, fax and email):
Gunnison County Health & Human Services 225 N Pine St, Suite B Gunnison, CO 81230 970-641-7984 (telephone) 970-641-8346 (fax)	Karin Stewart 225 N Pine St, Suite B Gunnison, CO 81230 970-641-7984 (telephone) 970-641-8346 (fax) kstewart@gunnisoncounty.org
Employer Identification Number (EIN): 84-6000770	Type of Applicant: County [X] Municipality [ ] Private Organization [ ] Non-Profit Organization [ ] Other [ ]
Type of Application: New ☐ Continuation ☑	Dates of Project Funding: From **7/01/13** Through **6/30/14**
Areas Served by Project: Gunnison County	Type of Service: Information and Assistance Program

Service Projections					Targeting Projections			
Service Category	Estimated Units of Service	Estimated Clients Served	Cost Per Unit	Estimated First Time Served	Rural Clients	Minority Clients	Low Income Clients	Frail Clients
Info & Assistance	12,360	12,360	$9.58	300	900	150	500	250

Amount of Funding Requested: $33,000

Description of funding sources and amount of local cash and project income:
From other revenues streams for Information and Assistance services (contracts & grants), telephone and computer
= $85,497 per year

Estimated in-kind services; amount, source and rate: $4800 annually for rent of office space

Brief description of project: The Senior Resources Office bridges services currently being provided in our community for seniors and the families of seniors and becomes a "one stop" or single entry for resource, referral, service coordination and health education, so that our seniors will have a comprehensive, efficient way to gain knowledge of community resources to help maintain health and independence.

To the best of my knowledge and belief all data in this application are true and correct. The document has been duly authorized by the governing body of the applicant and the applicant will comply with the attached assurances if the funding is awarded.

Typed Name of Authorized Representative	Title	Telephone Number
Matthew Birnie	County Manager	970-641-7600
Signature of Authorized Representative		Date Signed 3/25/2013

ATTACHMENT B

Region 10 Area Agency on Aging Project Budget

Title of Project: Sr Resources Office (Information & Assistance) **Fiscal Year:** 2014

PROJECT BUDGET (Please complete the shaded boxes. The rest will calculate automatically)		
Project Revenues		
Funds Requested Federal ☐ State ☑		33,000
Local Cash Match	1.	80,697
Local In-Kind Match	2.	4,800
Project Income	3.	0
Total Project Revenues		**118,497**

Project Expenses	
Personnel	100,281
Travel	676
Supplies	676
Fuel	0
Other Direct	12,064
Local In-Kind Match	4,800
Total Project Expenses	**118,497**

NOTE: Total Project Expenses must equal Total Project Revenues

NOTE: Combined revenues from Local Cash & In-Kind Match must equal a minimum of 10% of funds requested	85,497 259%

PLEASE COMPLETE THE FOLLOWING:
(DOLLAR AMOUNTS ONLY)

1. Sources of Local Cash Match

County 32862

City $

Other 47835

Total Local Cash Match **$80,697**

2. Sources of In-Kind Match

Personnel

Rent 4800

Other $

Total In-Kind Match $4,800

3. Source of Project Income

Client Contribution

Interest $

Total Project Income **$0**

Narrative Description of Proposed Project

Senior Resources Office (Information and Assistance)

SCOPE:

The Gunnison County Senior Resources Office has a mission dedicated to offering resources, referrals and service coordination to individuals of Gunnison County, age 60 and older, without regards to race, color, national origin, sex, or income. We provide seniors, and their families, a comprehensive, efficient way to gain knowledge of resources in our community to help them maintain health and independence.

The Senior Resources Office, a division of Gunnison County Health & Human Services, provides information and referral assistance to older adults, family/friends, professionals, and community members. The office also maintains current databases, available in both print and electronic versions, of all services available to seniors in Gunnison County and surrounding areas, such as Hinsdale County, Salida and the Western Slope.

The SRO leads coordinated collaborative efforts in the community to create new services to fill "gaps" in areas where demand is greater than the service supply, such as caregiver resources, out of town transportation, dental care and access to care for uninsured and underinsured individuals. The SRO also helps identify overlaps or duplications in services in order to avoid resource waste and optimize consumer utilization of available services.

We are requesting funding this year to help cover personnel costs for the Senior Resources Coordinator and Senior Resources Specialist.

Our goals and objectives are similar to our prior year's goals which were met with success, and are still pertinent and applicable.

Goal 1 - Expand utilization of local services in the community, including (but not limited to) Senior Transportation Services, Homemaker/Personal Care Services, Caregiver Support and Education programs, Dental Prevention Program, Legal Assistance, Housing Resources, and Medication Management.

- Objective A - Increase awareness and availability of these programs by conducting presentations at various community meetings and group gatherings (i.e. AARP, CRSEA, Young At Heart senior lunch program, Boomers and Beyond, Mountain View Senior Apartments)
  Measurement - Maintain records of presentations given to and meetings attended with various community groups

- Objective B - Increase publicity of Information and Assistance service through local media
  Measurement - Maintain records of advertising methods and meetings attended with various community groups (i.e. Senior Scoop, www.gunnisonseniors.com, Church Bulletins, community newsletters, print media boards, SRO publications, local newspapers)

- Objective C – Maintain availability of direct Information and Assistance service
  Measurement - Maintain monthly contact logs which denote basic demographic information of customer and information requested.

Goal 2 - Meet funding reporting requirements

- Objective A - Collect and submit timely monthly information and referral data and donation reports
  Measurement - Maintain records of monthly consumer reports to Region 10 AAA

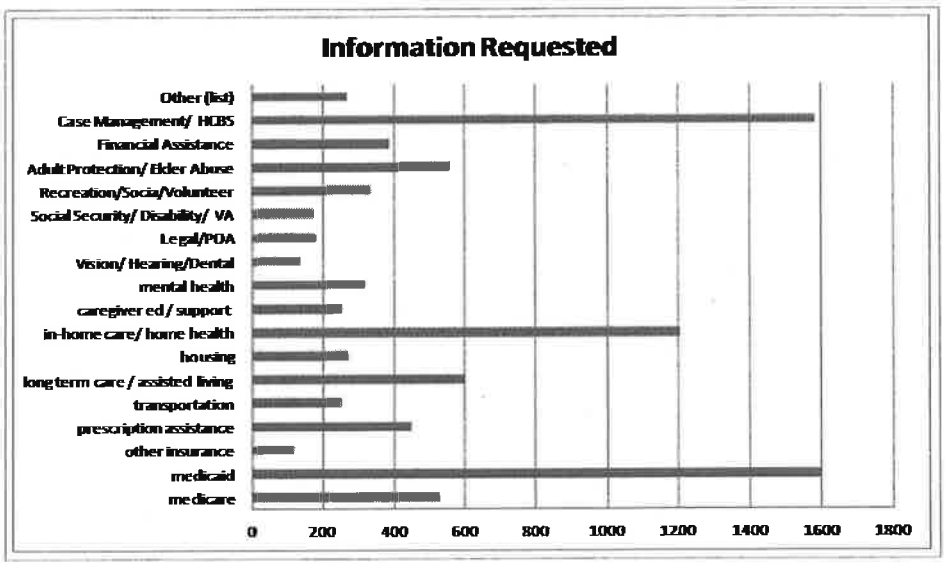
- Objective B - Monitor budget and finance reports on a monthly basis

Measurement - Maintain records of monthly reimbursement requests to Region 10 AAA

We believe that these goals continue to be realistic and expect to meet these goals and objectives fully. As the aging population continues to grow, more people request information and assistance to help navigate the complex systems of elder care and long term caregiving challenges. Our service area is primarily Gunnison County however we also serve several individuals with ties to Hinsdale County, because Gunnison is a larger community with services frequently utilized by Hinsdale County residents.

The SRO office is located within the Family Services Center, which meets ADA accessibility requirements, including a flat entry doorway with hands-free opener, accessible restrooms, and TTY capability.

The graph below demonstrates the types and volume of information and services being requested by those who contact the Senior Resources Office. This helps provide data when evaluating demand for services and helps identify needs for service enhancement or overlaps in services.



CAPACITY/CAPABILITY:

Gunnison County will continue to utilize the Senior Resources Office (SRO) to coordinate this project. The SRO has been serving the community since 2002 and is a trusted source for aging-related information, resource assistance and help in navigating the complex systems of public and private insurances and Social Security. The SRO Coordinator and Senior Resource Specialists have experience working in the field of geriatric social work and case management for a combined 30 years. Both the County and SRO personnel have extensive experience in working within Region 10 grant reporting guidelines, and the Senior Resources Office has a proven track record of good coordination, creation and expansion of projects for seniors in the county. Gunnison County has the necessary resources to deliver the services noted in this proposal and has the capacity to comply with all regulations and deadlines. All reporting requirements will be coordinated and submitted monthly by the project manager, according to guidelines set by Region 10 AAA. All budgets and financial reports are maintained by Gunnison County's Finance Department personnel. Because of the size of the documents and in efforts to limit paper consumption, a copy of the Gunnison County Health & Human Services approved budget is included as an attachment to the proposal. A full copy of Gunnison County's budget and most recent, audited financials may be viewed by visiting Gunnison County's website, http://www.gunnisoncounty.org/finance.html.

Gunnison County had no outstanding compliance issues from FY2013 Evaluation.

OUTREACH & PARTICIPANT CONTRIBUTIONS:

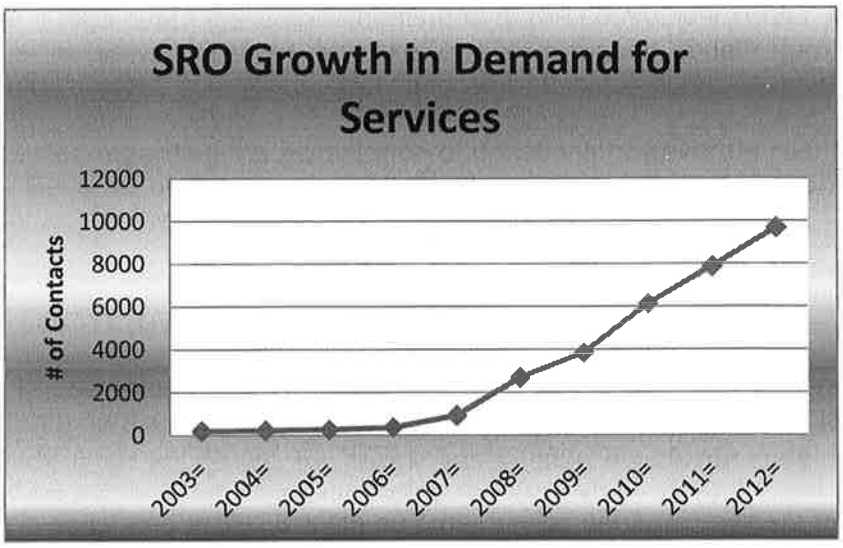
Outreach will continue to be directed to seniors residing in and visiting Gunnison County, and with other community agencies working with target population of seniors with social and economic need (primarily the Senior Resources Advisory Council). This will be measured monthly by numbers of contacts with these agencies, and the data collected regarding office utilization.

At least annually, awareness and accessibility of the SRO services is re-evaluated by SRO personnel and presented to the Senior Advisory Council for input on increasing visibility and outreach of the program. We will continue to utilize earned media such as Gunnison seniors' website (www.gunnisonseniors.com), through the provision and maintenance of a weekly column called the "Senior Scoop" in the Gunnison Country Shopper, local access TV, local newspapers, flyers, newsletters and church bulletins. We maintain informational bulletin boards at the local senior independent living apartments and at the community center where senior programs meet. We also maintain a "list-serve" for those who like to receive regular update from the Senior Resources Office via email.

The office has signage posted regarding the acceptance of donations however no client is denied service due to inability to contribute. Because of the nature of I & A service, no suggested donation amount is noted. All monies collected are reserved for the Senior Resources Office.

COST & SERVICE UNIT DELIVERABILITY:

We estimate delivering 12,360 Information & Assistance units of service (400 in-person or telephone; 630 website) over a twelve month period (July 2013-June 2014), which is an average of 1030 per month. Currently, we deliver an average of 995 units per month, so 1030 projects moderate growth in demand for services which is reasonable and should be easily attainable considering our consistent upward trend of demand (see graph below). Our cost per unit is estimated at $9.58. With no other similar service providers to compare to within our county, we believe that this amount is reasonable and competitive with similar services in the region. Because of the nature of I&A services, we currently do not have need to employ a waiting list, and we strive to respond to all inquired within one business day. If a wait list becomes necessary in the future, we will prioritize our responses to targeted populations of frail, homebound, disabled, minority and low-income individuals.



ALTERNATIVE FUNDING:

Currently, funding sources include Region 10 AAA, as well as the sub-contract through Delta County to provide Home & Community Based Services (HCBS) case management, and funding from Gunnison County Dept of Health & Human Services for the provision of Adult Protective Services and supervision of benefits eligibility personnel. Our FY2013 Program Evaluation noted a recommendation to research new alternative funding sources to supplement our future program budget. We are continuously exploring options for other funding to ensure consistent revenue for office operations, such as with private foundations.

COORDINATION/COLLABORATION/NETWORKING:

The Senior Resources Office is well-established in the community and has a strong reputation of accurate and efficient service. We continually strive to strengthen our network of supporters to enhance our ability to collaborate with other agencies and municipalities to broaden the scope of services, as needed.

The Senior Resources Advisory Council meets quarterly and is very involved and supportive of the SRO's mission and efforts. Our Advisory Council is made up of members from Gunnison, Lake City, Montrose and Delta to better coordinate local and regional resources (see attachment for a listing of current Advisory Council members).

SRO personnel work closely with the local healthcare community, the Board of County Commissioners, RSVP, AARP and other senior organizations, the City of Gunnison, the Town of Crested Butte, Gunnison County Health & Human Services Commission and Department of Health & Human Services. Because of our strong collaborative efforts, we are able to maximize use of local resources, reduce duplication of services and minimize costs of administrative overhead.

CONTINUOUS IMPROVEMENT:

Gunnison County in involved in a performance improvement initiative called "Managing for Results." Performance measures set as part of this initiative revolve around customer satisfaction. One of the SRO result measure goals is that 75% of surveyed individuals receiving home based services reporting an improved quality of life. We are exceeding our target of 75%, with a result of 90% customer satisfaction response.

Gunnison County has a formal grievance procedure, which the SRO utilizes. Any grievances, complaints or concerns are brought to a staff member to resolve and that feedback is logged in order to improve our processes in the future.

VOLUNTEERISM:

The Senior Resources Office does not directly use volunteers for I & A service provision, but some activities, such as Medicare Counseling, are provided in our office by with Retired & Senior Volunteer Program (RSVP) volunteers. RSVP Volunteers assigned to the SRO receive training pertinent to our organization, including an overview of our mission and purpose in the community.

Gunnison County Senior Resources Advisory Board Directory/ Meeting Attendance

Name	Organization	Address	Phone	FAX	Email
Alena Haskell	Hinsdale County Senior Coordinator	PO Box 144, Lake City	970-944-0321	970-944-1122	phn@hinsdalecountycolorado.us
April Martinez	Touch Of Care	108 W. 2nd Street, Delta, CO 81416	970-874-6115	970-874-6979	april@touchofcarepcp.com
Audrey Miller/ Patty Jagger	Boomers & Beyond, Inc.	116 N Wisconsin	970-641-1940	n/a	ajmiller@q.com
Barbara Bennigsdorf	Caregiver Solutions	2333 Freedom Way, Montrose 81401	249-0440	252-1972	cgsolutions60@gmail.com
Brian Bowler	OLTC - Delta, Gunnison, Hinsdale	PO Box 729, Hotchkiss 81419	970-872-1206	970-872-1229	bbowler@deltacounty.org
Christine Holbrook	Gunnison Valley Health - Hospital	711 N Taylor St.	641-1456	641-7261	cholbrook@gvh-colorado.org
Claudette Nicolas	Region 10 Area Agency on Aging	300 N Cascade, Montrose 81401	249-2436X 11	249-2488	claudette@region10.net
Geri Howard	DHHS/ SRO	225 N. Pine St	642-4664	641-8346	ghoward@gunnisoncounty.org
Jane Poulos	LTC Ombudsman	PO Box 164, Paonia 81428	970-527-7055	n/a	mjpoulos@hotmail.com
Karin Stewart	DHHS/ SRO	225 N. Pine St	641-7984	641-8346	kstewart@gunnisoncounty.org
Kelly Roy	OLTC - Delta, Gunnison, Hinsdale	PO Box 729, Hotchkiss 81419	970-872-1201	970-872-1229	kroy@deltacounty.com
Laura Arnett	RSVP	601 N Iowa	641-0153	n/a	lauracarnett@hotmail.com
Mark Abramson	Dept of Voacational Rehabilitiation				mdabramson@gmail.com
Mary Smith-Harland	DHHS	225 N Pine St	641-7948	641-3738	mary.smith-harland@state.co.us
Mary Vader	Gunnison County Housing Authority	202 E Georgia	641-7675	641-7931	mvader@gunnisoncounty.org
Michelle Haynes	Region 10 Area Agency on Aging	300 N Cascade, Montrose 81401	249-2436x 15	249-2488	mhaynes@region10.net
Pam Brunsells	Gunnison Valley Health - Home Medical Services	805 West Tomichi	641-4254	641-4784	kwoodford@gvh-co.org
Renee Brown	DHHS	225 N Pine St	641-7940	641-3738	renee.brown@state.co.us
Rogene McKiernan	Region 10 Area Agency on Aging Advisory Board	701W Elizabeth Ave	641-4955	n/a	rmckiernan@q.com
Shandy Kibler	Gunnison Valley Health - Senior Care Center	1500 West Tomichi Ave	641-0704	641-1826	skibler@gvh-colorado.org
Sharon Williams	Gunnison Valley Health - Home Medical Services	805 West Tomichi	641-4254	641-4784	swilliams@gvh-colorado.org
Shirley Corn	Young At Heart				scorn7@live.com
Sue Uerling	Six Points Evaluation & Training	320 South 14th Street	970-641-3081	970-641-0800	director@sixpointsgunnison.org
VACANT	Center for Independence	300 N Cascade #C10, Montrose,81402	970-270-1948	249-8125	

updated 03/04/2013

Certification Regarding Debarment

Gunnison County Health & Human Services certifies, to the best of its knowledge, that it is not presently debarred, suspended, proposed for debarment, declared in eligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Region 10 AAA Assurances

Gunnison County Health & Human Services acknowledges that we have read, understand and will comply with the "Assurance of Compliance" items, as listed in Attachment E of the Request for Proposals materials.

GUNNISON COUNTY BOARD OF COMMISSIONERS

Phil Chamberland, Commissioner
District 3
Took Office in 01/2011
Term Expires 01/2015

pchamberland@gunnisoncounty.org
Cell: 970-209-3715

Paula Swenson, Commissioner
District 1
Took Office in 01/2005
Term Expires 01/2017

pswenson@gunnisoncounty.org
Cell: 970-209-6920

Jonathan Houck, Commissioner
District 2
Took Office in 01/2013
Term Expires 01/2017

jhouck@gunnisoncounty.org
Cell: 970-275-9625

REGION 10

Community Living Services

AREA AGENCY ON AGING

REQUEST FOR PROPOSALS

OLDER AMERICANS ACT SERVICES FOR OLDER ADULTS

Congregate Meals

Evidence Based Health Promotion

Family Caregiver Support Service

Homemaker Services

Home Delivered Meals

Information and Assistance/Senior Services Support

Legal Assistance

Nutrition Education

Transportation Services

Proposals Due: Friday, April 5, 2013

ARCH - units w/ access/ follow-up.

Region10 Community Living Services
Michelle Haynes/Executive Director
300 North Cascade, Suite #1
Montrose, Colorado 81401
(970) 249-2436, x. 15

TABLE OF CONTENTS

I. OVERVIEW

Summary 1
Request for Proposal (RFP) Schedule 1
Period of Performance 2
Project Direction 2
Required Elements in Response Format 2
Local Match Requirements 2
Selection Process 2
Technical Assistance 2
Evaluation Criteria 2

II. GENERAL INSTRUCTIONS

Submission 3
Multiple Services 3
Copy of Proposal 3
Signature Requirements 3
Rejection Rights 3
Cost of Proposal Preparation 3
Request for Proposals 3
Equal Employment Opportunity 3
Conditional Approval 4
Contract Limitations 4
Assurance of Compliance 4

III. RFP REQUIREMENTS

Funding Application 4
Project Budget 4
Narrative Description 4
Completed Application Format 5

IV. FORMS

ATTACHMENT A - Region 10 Area Agency on Aging Funding Application
ATTACHMENT B - Region 10 Area Agency on Aging Project Budget
ATTACHMENT C - Project Budget Instructions
ATTACHMENT D - Definitions
ATTACHMENT E - Assurance of Compliance

I. OVERVIEW

A. Summary

The Region 10 Area Agency on Aging (AAA) is soliciting proposals from organizations interested in providing services for older adults (60+) to fulfill the requirements of the Older Americans Act and Older Coloradans Act Funding for Senior Services within Region 10. The Region 10 AAA serves six counties: Delta, Gunnison, Hinsdale, Montrose, Ouray and San Miguel.

B. RFP Schedule

Consideration of the proposals will be governed by the following schedule:

MEETING TYPE	DATE	TIME	LOCATION
RAC Meeting (Review of proposal evaluation criteria & RFP)	Wednesday, 02/13/13	10am-12:30pm	Region 10/Montrose Sneffels Conf Rm
FY14 RFP Issued & Application Materials Available	Wednesday, 2/20/13	n/a	email to current providers & newspapers
Deadline for FY14 Technical Assistance	Wednesday, 03/27/2013	4:30 p.m.	n/a
FY14 Proposal Deadline	**Friday, 04/05/12**	**4:30 PM**	**Region 10 - AAA Director**
FY14 Proposals to RAC for review	Wednesday, 04/10/13	n/a	n/a
FY14 Provider Presentations to RAC (Mandatory) & Proposal Discussion (RAC/AAA)	Wednesday, 04/17/13	9:30am-11:30am	Region 10/Montrose, Sneffels Conf Rm
FY14 SUA Funding Application Available to AAA's	By end of April 2013	n/a	n/a
RAC Meeting (FY13 funding discussion & action)	Wednesday, 05/08/13	10am-1pm	Region 10/Montrose, Sneffels Conf Rm
RAC Funding Recommendations to R10 Board (RAC Chair, AAA Director)	Thursday, 05/23/13	noon - 3pm	Region 10/Montrose, Sneffels Conf Rm
FY13 Applicant Funding Notification	Wednesday, 06/05/13	n/a	via email (contingent upon receipt of FY14 budget from SUA)
Submission of FY14 SUA Funding Application	Beginning of June 2013	n/a	n/a
Issue FY14 Contract to Providers	Beginning of June 2013	n/a	n/a
Deadline for FY13 Provider Contracts to Be Completed & Returned to AAA	Wednesday, 06/20/13	4:30 PM	Region10 AAA
Start of FY13 Funding Cycle/Contracts	Sunday, 07/01/12	n/a	n/a

C. Period of Performance

Performance of Older Americans Act Service Contracts resulting from this Request for Proposals will commence on July 1, 2013 and end on June 30, 2014. Direct Service Bid Agreements resulting from this Request will have a period of performance mutually agreed upon by Region 10 and the vendor proposing services.

D. Project Direction

The Region 10 Area Agency on Aging will be responsible for providing direction to selected contractors and vendors in the Older Americans Act and Older Coloradans Act Funding for Senior Services programs.

E. Required Elements in Response Format

- All RFP's shall be typed and have the capability to be sent electronically.
- All paper must be white and 8 ½ X 11 in size.
- Do not type on the back of any page. When extra sheets are required, please indicate by number and heading where the information belongs.
- Use all provided forms.
- Submit the proposal documents with the order of pages maintained.
- Use 11 point, Arial font for the proposal narrative.

F. Local Match Requirements

A minimum of 10% local match (local cash and/or in-kind) is required of each funded program excluding the Family Caregiver Support funds. The Caregiver Support Service funds require 25% local match (local cash and/or in-kind).

G. Selection Process for Service Contracts (see I.B. RFP Schedule)

- The Region 10 Area Agency on Aging Director completes a proposal evaluation criteria worksheet for all submittals.

- The proposal evaluation criteria consists of a minimum and secondary set of standards. If the proposal passes the minimum evaluation criteria it is then given further consideration and secondary evaluation criteria is considered by the Region 10 Area Agency on Aging Director.

- The Region 10 Area Agency on Aging Director then makes recommendations to the Region 10 AAA Regional Advisory Council (RAC) on the basis of completed proposals that best meet the specifications of the RFP.

- The provider makes a mandatory presentation to the RAC, the RAC reviews the proposals and makes their recommendations to the Area Agency on Aging Director.

- Region 10 AAA formulates final recommendations and the RAC Chair along with the AAA Director presents them to the Region 10 Board for final approval. Upon Board approval, the selected agencies are notified by email.

H. Selection Process for Bid Agreements (Vendor Pool of Direct Services Providers)

- Completed proposals submitted within the established timeframes will be considered for enrollment into the Direct Service Providers Vendor Pool. The agency reserves the right to consider on an as-needed basis contracts submitted outside of the established timeframe.

- In the case of this RFP, vendor pool providers will be vetted using the same selection process and RFP Schedule as FY14 Yearly Service Contracts. If service needs require additional vendors before the next RFP is issued, an advertised, open enrollment period may be used to populate the vendor pool.

- Bid Agreements for new vendors are effective on the date of the Region 10 Executive Director's signature and remain in effect until a new Bid Agreement and/or Bid Addendum is finalized.

- The Region 10 Area Agency on Aging Director then makes recommendations to the Region 10 AAA Regional Advisory Council (RAC) on the basis of completed proposals that best meet the specifications of the RFP.

- The provider makes a mandatory presentation to the RAC, the RAC reviews the proposals and makes their recommendations to the Area Agency on Aging Director.

- Region 10 AAA formulates final recommendations and the RAC Chair along with the AAA Director presents them to the Region 10 Board for final approval. Upon Board approval, the selected agencies are notified by email.

I. Technical Assistance

The Region 10 AAA will be available to provide technical assistance as needed to any respondent during the submission period, up to March 28, 2013. Please contact the Region 10 AAA office for technical assistance needs.

J. Evaluation Criteria (see Region 10 Area Agency on Aging Proposal Evaluation Criteria worksheet)

INITIAL EVALUATION CRITERIA – In order for a proposal to be reviewed by the RAC it must meet the minimum evaluation criteria as follows:

- Proposal received by AAA Director by 4:30 p.m. on Friday, 04/05/13
- Proposal meets response format outlined in (I.OVERVIEW, E. Required Elements in Response Format), is signed, dated and complete
- Need of service - Proposal meets OAA (Title III or VII) and/or OCA funding requirements
- Need of service - Proposal fits within the current Region10 AAA 4 Year Plan
- Proposal includes proof that agency is free from federal debarment

Proposals that fail to meet the minimum evaluation criteria will ***not*** be reviewed further and will receive no further consideration for the fiscal year.

PROPOSAL EVALUATION CRITERIA - If the proposal meets the minimum evaluation criteria it will be subject to the following secondary evaluation criteria which are based on section III. RFP REQUIREMENTS, C. Narrative Description of Proposed Project:

- SCOPE
- CAPACITY/CAPABILITY
- OUTREACH & PARTICIPANT CONTRIBUTIONS
- COST & SERVICE UNIT DELIVERABILITY
- ALTERNATIVE FUNDING
- COORDINATION/COLLABORATION/NETWORKING
- CONTINUOUS IMPROVEMENT
- VOLUNTEERISM

II. GENERAL INSTRUCTIONS

A. Submission – Proposals should be submitted on time and in the required format. Submit one copy of the completed proposal by mail or hand deliver to Region 10 Area Agency on Aging, Michelle Haynes/AAA Director, 300 N. Cascade, Suite #1, Montrose, CO 81401 (NOTE: No faxed or email proposals will be accepted.)

B. Multiple Services – Organizations may apply for funds for more than one service. Each service application must have a separate Funding Application, Budget and Narrative description of proposed project.

C. Copy of Proposal - A copy of the proposal shall be kept by the respondent.

D. Signature Requirements – Proposals must be signed by a duly authorized official of the respondent.

E. Rejection Rights - All respondents are notified that the execution of a contract or bid agreement pursuant to this Request for Proposals is dependent upon approval by Region 10 AAA. Region 10 AAA reserves the right to reject all responses and re-solicit if necessary. If there is a need to re-solicit proposals for a program, all providers previously submitting a proposal for that service will be included in the process if they met the minimum evaluation criteria in their initial proposal. Selection of an organization is also dependent on the negotiation of an acceptable contract with the successful respondent.

F. Cost of Proposal Preparation and Other Charges - No reimbursements will be made by Region 10 AAA for any costs incurred prior to a formal notice to proceed in an executed contract.

G. Request for Proposals - All responses to this request become the property of Region 10 AAA upon receipt and will not be returned to the respondent. Selection or rejection will not affect this right. Region 10 AAA shall have the right to use any or all of the ideas or adaptations of the ideas contained in any proposal received in response to this solicitation. Any proprietary information submitted in response to this request shall be clearly marked and will be handled in accordance with applicable federal and state procurement regulations. Neither cost information nor the total proposal will be considered proprietary.

H. Equal Employment Opportunity - In connection with this request, the respondent shall not discriminate against any individual because of race, color, religion or belief, sex, national origin, age, disability, political affiliation, marital status, or because the individual is a disadvantaged person or a veteran. Such action shall include, but not be limited to, the following: employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation and selection for training, including any apprenticeship. The Respondent will furnish all necessary information and reports and will permit access to its books, records and accounts by Region 10 AAA for purposes of investigation to ascertain compliance with the nondiscrimination provisions of any resultant contract.

I. Conditional Approval – The AAA may conditionally approve applications by attaching conditions to the contract, which restrict proposed expenditure of funds and require that corrective actions be completed or that additional information be submitted by a specific date.

J. Contract Limitations – The contract is subject to the receipt of a State of Colorado Contract for Funding to Region 10 AAA for Older Americans Act and Colorado State Funding for Senior Services Programs.

K. Assurance of Compliance – After careful examination of the following list, the respondent assures

that, during the funding period, respondent will comply with all pertinent and prevailing laws, regulations, and ordinances of federal, state and local governments including but not limited to:

1. Federal Older Americans Act
2. State of Colorado Older Coloradans Act
3. Colorado Department of Human Services Manual Volume 10
4. State Unit on Aging Policy and Procedures Manual
5. Region 10 AAA Policy and Procedures Manual
6. Region 10 AAA Assurance of Compliance Document (Attachment E)

III. RFP REQUIREMENTS

A. Funding Application

1. Complete 2013 Funding Application Form (Attachment A)
2. Appropriate official must sign and date form
3. Each service category must have all service projections and targeting projections completed (Attachment D)
4. Review, understand and be able to apply NAPIS Service Definitions (Attachment D)

B. Project Budget

1. Complete 2013 Project Form (Attachment B)
2. Review Budget Instructions (Attachment C)

C. Narrative Description of Proposed Project

- SCOPE – Identify and describe the services to be provided. Organization's mission, clearly defined scope of work with realistic goals and measurable objectives should be included, as well as the need for and expected results of the project. List the prior year's goals and successes in accomplishing them. Outline where within Region10's six (6) counties the services are to be delivered and if/how your agency addresses ADA requirements.

- CAPACITY/CAPABILITY - Applicant needs to discuss their qualifications and experience, as well as appropriate resources relating to delivery of Older Americans Act (OAA) services. Details as to their ability to comply with all regulations and deadlines (for the AAA, SUA, OAA, etc.) and how the organization is able to perform and manage all associated work in a timely fashion within budget should be outlined. Applicant should include a copy of their organization's final year end financials. NOTE TO PRIOR AAA FUND RECIPIENTS: Discuss if compliance issues from prior year's evaluations have been addressed and rectified. A copy of the evaluation will be made available to the RAC, by the AAA, for consideration during the proposal review process.

- OUTREACH & PARTICIPANT CONTRIBUTIONS – Describe how your organization provides simple, cost effective, up to date outreach materials. This information and other older adult services information in the region should be readily available with the service area. Outreach materials should consider that the Older Americans Act prohibits the charging of fees and the use of means testing. However, the Older Americans Act requests that each older adult receiving service be provided with the opportunity to contribute toward the cost of the service. Discuss how opportunities for customer contributions will be marketed and/or communicated to older adults in the program and how contributions will be utilized to expand services as well as what the suggested donation amount is.

- COST & SERVICE UNIT DELIVERABILITY – Outline the proposed service, how it is cost effective and/or competitive for the area, number of service units to be delivered (this should be both reasonable and attainable) and how you will give priority to target populations (frail, homebound, disabled, minority, low income). Address the potential need for a waiting list and your organization's waiting list policy.

- ALTERNATIVE FUNDING –List and describe current sources of alternative funding as well as how the alternative funding is used to reduce overall costs of services to older adults. Include short term/long term plans to acquire additional alternative funding.

- COORDINATION/COLLABORATION/NETWORKING – List and describe your relationships with other organizations that you collaborate with. The types of services they provide and the type of collaboration/coordination that occurs or will occur with the organizations should be discussed. NOTE: Collaboration should maximize/optimize local resources as well as reduce duplication of services and administrative overhead.

- CONTINUOUS IMPROVEMENT – Explain your plan to obtain feedback from service recipients regarding the older adult service your agency provides and how that feedback will be utilized to improve services as well as how you will address complaints arising from feedback.

- VOLUNTEERISM (to be completed if you currently have or recruit volunteers) - Discuss volunteer opportunities within your organization and how those opportunities are marketed. Provide details of current number of volunteers and your organization's volunteer requirements (i.e. training). Volunteers should understand your organization's mission and also be able to comply with all rules and regulations (organizational as well as AAA, state, federal, etc.).

D. Completed Application Format – A completed application packet should consist of the following:

1. *Funding Application Form*
2. *Proposed Budget Form*
3. *Narrative description of the project not to exceed 5 pages, 11 point, Arial font*
4. *Region 10 AAA Assurances*
5. *List of Current Board of Directors or Governing Board (including first and last name, phone, email, start of term and length of term)*

ATTACHMENT A

Region 10 Area Agency on Aging Funding Application

Title of Project:

Organization (name, address, phone, fax and email):	Project Director (name, address, phone, fax and email):
Employer Identification Number (EIN):	Type of Applicant: County ☐ Municipality ☐ Private Organization ☐ Non-Profit Organization ☐ Other ☐
Type of Application: New ☐ Continuation ☐	Dates of Project Funding: From **7/01/12** Through **6/30/13**
Areas Served by Project:	Type of Service:

Service Projections				Targeting Projections				
Service Category	Estimated Units of Service	Estimated Clients Served	Cost Per Unit	Estimated First Time Served	Rural Clients	Minority Clients	Low Income Clients	Frail Clients

Amount of Funding Requested:

Description of funding sources and amount of local cash and project income:

Estimated in-kind services; amount, source and rate:

Brief description of project:

To the best of my knowledge and belief all data in this application are true and correct. The document has been duly authorized by the governing body of the applicant and the applicant will comply with the attached assurances if the funding is awarded.

Typed Name of Authorized Representative	Title	Telephone Number
Signature of Authorized Representative		Date Signed

ATTACHMENT C

Project Budget Instructions

This budget should reflect only your budget for the services you propose. You will need to use acceptable accounting methods to determine the appropriate costs for the services you propose. The revenue amounts and sources you show on this form must match those shown on the cover page.

Project Revenues

Funds Requested

- Federal - Older Americans Act federal funding request for the project year
- State - Older Coloradans Act state funding request for the project year

Local Cash Match - Include all non-federal funds (municipal and county) that are used for payment of allowable costs charged to the project. Other cash match is all other funding sources (foundations, service clubs, other grants). The match must not be used to match any other federal or state funds.

Local In-Kind Match - Includes personnel (staff and volunteers), facility utilization, services, or goods donated by the applicant or third party, which are allowable costs of the funding award for which no cash reimbursement is required. The Local In-Kind Match must not be used to match any other federal or state funds.

Program Income - Total voluntary client contributions, interest and other projected income.

Total Project Revenues - The total of all of the above revenue items.

Project Expenses

Personnel - Includes salaries, wages and benefits for employees.

Travel - Travel by staff and/or volunteers that will be required to provide service.

Equipment - Equipment refers only to items costing $500 or more and having a useful life of more than one year. **All Title III equipment expenditures must be included as part of the application.**

Supplies - These costs may include materials, printing, office supplies, postage, etc.

Fuel - Energy source for vehicles utilized in providing older adult services.

Other Direct - Includes capital expenditures and all other expenses not directly applicable to any other line item such as rent, utilities, insurance, repairs/maintenance, audit expenses, etc.

Local In-Kind Match - Includes personnel, rent, services, or goods donated by the applicant or third party, which are allowable costs of the funding award for which no cash reimbursement is required.

Total Project Expenses - The total of all of the above expense items.

Local Cash, In-Kind, Project Income

List all sources of local cash match, in-kind match, program income and the total amount from each source. Totals must match the amounts listed in the "Project Budget".

Note: Total Project Expenses must equal Total Project Revenues

ATTACHMENT D

Definitions

General Definitions

ADL (Activities of Daily Living): The inability to perform one or more of the following activities of daily living without personal assistance: transferring in and out of bed/chair, toileting, walking, dressing, bathing, hygiene and eating.

Alternative Funding: Additional funding sources generated to assist with project service development and implementation.

Cost per Unit: Total Project Expenses (Budget Form-Attachment B) divided by Total Estimated Units of Service (Funding Application-Attachment A).

Estimated Clients Served: Total number of "unduplicated clients" served over project fiscal year. An individual is counted only once during the fiscal year. An individual shall be counted separately if they use multiple services in the same fiscal year.

Estimated First Time Served: Total number of new "unduplicated clients" receiving project services.

Estimated Units of Service: Total number of units provided over project fiscal year. Units are defined utilizing Service Category Definitions.

Federal Poverty Guidelines 2012: Annual income for a family unit of one - $11,160. Annual income for a family unit of two or more - $15,120 (Source: SUA Policy Directive 11-05, February 7, 2012).

Frail: Persons aged 60+ who are determined to be functionally impaired due to

(A) Inability to perform at least two (2) activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision or,

(B) A cognitive or other mental impairment requiring substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to self or others.

Goals: Broad statement of direction for the organization and anticipated project outcomes.

Greatest Economic Need: The need resulting from an income level at or below the federal poverty threshold guidelines established for 2012.

Greatest Social Need: The need resulting from non-economic factors, such as physical and mental disabilities, language barriers, cultural, social or geographic isolation, including that caused by racial or ethnic barriers.

IADL (Instrumental Activities of Daily Living): The inability to perform one or more of the following activities necessary for independent living without personal assistance or stand-by assistance, supervision or cues: meal preparation, housework, laundry, shopping, medication management, appointment management, money management, access resources, transportation and telephone usage.

***Low-Income Clients*:** All persons aged 60+ with an annual income at or below the established poverty guidelines (refer to Federal Poverty Guidelines 2012).

Minority Clients: Persons aged 60+ who are African American, American Indian/Alaskan Native, Asian/Pacific Islander, or Hispanic.

Minority Organizations: Not for profit organizations with a controlling board comprised at least fifty-one percent (51%) of individuals in the racial and ethnic categories listed above or a private business concern that is at least fifty-one percent (51%) owned by individuals in the racial and ethnic categories listed above.

***NAPIS (National Aging Program Information System)*:** National reporting system used to record Older Americans Act services.

***Objectives*:** Objectives should be specific, measurable, achievable, realistic within available resources and time-bound to the fiscal year for project services.

Rural Clients: Older individuals that reside in any area not defined as urban. Urban areas mean (1) a central place and its adjacent densely settled territories with a combined minimum population of 50,000 or (2) an incorporated place or a census designated place with 20,000 or more inhabitants (Delta and Montrose Counties).

***Service Category*:** Specific older adult services the project is planning to provide that are available under NAPIS service definitions (see below). **Note: Projects shall choose the minimum number of service categories necessary to provide services. Multiple service category use may result in separate contracts for each service category.**

NAPIS Service Category Definitions & Units of Service

- *Caregiver Support Services:* Provides services and supports under five sub-categories that enable caregivers to provide care for an older adult while maintaining their own quality of life. Sub-categories include: Information, Access Assistance, Individual Counseling, Respite Care and Supplemental Services.

- *Congregate Meals*: One meal equals one unit of service. Provision of a meal that meets all OAA requirements, to an eligible individual at a nutrition site, senior center or some other congregate setting.

- *Education (Legal)*: One hour equals one unit of service. Providing legal instruction, training, or informational workshops to clients in order to increase their knowledge of legal issues and/or services.

- *Education (Group Outreach)*: One occurrence equals one unit of service. Use of flyers, brochures, pamphlets, newsletters, speaking engagements, etc., initiated by a provider to identify clients and to encourage the use of existing services and benefits.

- *Health Promotion*: One hour equals one unit of service. Programs that promote health and well being including programs for multigenerational participation that may include art therapy, dance therapy, dental, hearing, immunization, medication management screening and education, insurance counseling, music therapy, physical fitness and vision.

- *Home-Delivered Meals*: One meal equals one unit of service. Provision, to an eligible individual at that person's place of residence, of a meal that meets NAPIS definitions.

- *Homemaker:* One hour equals one unit of service. Providing assistance to persons with the inability to perform two or more of the instrumental activities of daily living (IADL's).

- *Information and Assistance*: One contact equals one unit of service. Contact with an individual/ or website inquiry that provides the individual with current information on opportunities and services available to the individual within their communities and links the individual to the services.

- *Legal Assistance*: One hour equals one unit of service. Legal advice, counseling and/or representation provided to an individual by an attorney or other person under the supervision of an attorney.

- *Nutrition Education*: One-session equals one unit of service. Provision of a program to promote better health by providing accurate and culturally sensitive nutrition information and education to consumers and overseen by a dietitian or individual of comparable expertise.

- *Ombudsman Services:* One complaint equals one unit of service. Actions taken that identify, investigate, or seek to resolve complaints made by or on behalf of an older individual who resides in a long-term care facility, relating to action, inaction or decisions of providers or public agencies that may adversely affect the health, safety, welfare or rights of such residents.

- *Transportation*: One, one-way trip equals one unit of service. Provision of a means of going from one location to another. Does not include any other activity.

ATTACHMENT E

Assurance of Compliance

A. The Respondent has a financial accounting system adequate to handle the accounting of all income and expenditures.

B. The Respondent will submit fiscal reports to the Region 10 Area Agency on Aging (AAA) by 4:30 p.m. the **12th of each month** of the agreement period (or prior business day if the 12th falls on a weekend or holiday).

C. The Respondent either uses the State Unit on Aging reporting system or has an intake and reporting system sufficient to report numbers of clients served, characteristics of clients served and units of service provided by service type on a monthly basis.

D. The Respondent will maintain such accounts and documents as will serve to permit determination at any time of the status of funds within the Award, including the disposition of all moneys received, and the nature and amount of all charges claimed to be against such funds.

E. The Respondent will not use the cash and/or in-kind match for Older Americans Act (OAA)/Older Coloradans Act (OCA) funding to fulfill matching requirements for other Federal or State funds. Cash and/or in-kind match contributed shall not consist of Federal funds or general program income, except as provided in 45 CFR 74.53.

F. The Respondent agrees to include all local cash, which is used for payment of allowable costs and assures that this local cash will be included in total budget and entered in cash budget column.

G. The Respondent agrees to include in their in-kind budget, all services, goods or property donated by a third party which are allowable costs of the funding award and for which cash reimbursement is not required.

H. A self-evaluation system will be developed which will provide for adequate feedback from the recipients of services, the results of which must be made available upon request to Region 10 AAA for planning and evaluation.

I. Any subcontracts held or initiated by the Respondent, which involve expenditures to be charged to the Region 10 AAA contract, will be reviewed and approved by Region 10 AAA prior to contract initiation.

J. The Respondent will advertise the availability of services to elderly persons, families of elderly person, service providers and the general community.

K. The Respondent will provide participants a voluntary opportunity to contribute to the cost of the service and

   a. Protect the privacy of each participant with respect to his or her contributions;
   b. Establish appropriate procedures to safeguard and account for all contributions; and
   c. Use all contributions to expand the services of the project.

L. Funds contracted as a result of this request are to be expended for the purposes set forth herein and in accordance with all applicable laws, regulations, policies and

procedures of the Region 10 AAA, the State of Colorado, and the Administration on Aging of the U.S. Dept. of Health and Human Services.

M. The Respondent will make substantial efforts to obtain support from private sources and other public organizations for services funded by OAA/OCA.

N. The Respondent will not use OAA/OCA funds to duplicate the services that may be funded through Medicaid, Medicare, Title XX or other available federal, state or local sources.

O. The Respondent understands that failure to submit requested financial and program reports or other information or failure to comply with any other requirements of the Award may result in a suspension or termination of the project. Funds awarded as a result of this application may be terminated for violations of any terms and requirements of this funding award.

P. The Respondent understands that funds awarded are contingent upon receipt of funds by Region 10 League for Economic Assistance and Planning, Inc. from the State of Colorado and the Federal Government, pursuant to the Annual and 4 Year Plan.

Q. The Respondent understands that if there is Federal Title III cash unearned at the time the funding award is terminated, the unearned amount will be returned to the Region 10 AAA.

R. The Respondent understands that activities conducted under the AAA project are subject to the cost principles of OMB Circular A-87 or A-122 and the administrative requirements of OMB Circular A-102 or A-110.

S. The Respondent understands that activities conducted under the AAA project are subject to audit. If costs are disallowed, the proportion of Federal funds disallowed must be returned to Region 10 League for Economic Assistance & Planning, Inc. If award is above $500,000, applicant must comply with Single Audit requirements of OMB Circular A-133. Copies of audit shall be made available to Region 10 AAA.

T. The performance of the services required hereunder shall be under the supervision of a Project Director. At any time a Project Director is not assigned to this contract, all work shall be suspended until the Organization assigns a mutually acceptable replacement Project Director.

U. The Respondent will give priority for the provision of services to elderly persons (60 and older) with the greatest social and economic need and minority clients.

V. The Respondent will comply with all applicable State and local health, fire, safety, building, zoning and sanitation laws, ordinances and/or codes.