

SOURCEWISE INVITATION FOR BID & REQUEST FOR PROPOSAL PROCEDURE: *AMERICAN RESCUE PLAN ACT (ARPA)*

The Sourcewise Invitation for Bid & Request for Proposal Procedure (IFB/RFP Procedure) provides detailed instructions describing the funding requirements and program requirements to support bidders through the proposal development and submission process. Organizations interested in submitting a Request for Proposal (RFP) can find the required templates for the available funding opportunities on the Sourcewise website at <https://www.mysourcewise.com/about/grantees/>. Interested entities should be able to successfully respond to the ARPA IFB/RFP application submission requirements out lined in the IFB/RFP procedure.

In response to COVID-19, the Federal American Rescue Plan Act (ARPA) funding was approved to fund COVID-19 response activities specific to California's Older American Act of 1965 Title III and Title VII programs. Sourcewise is administering the Invitation for Bid/Request for Proposal for ARPA funding to partner with qualified Santa Clara County agencies to administer innovative Older American Act programming and services to adults 60+ and informal caregivers. ARPA funding is a one-time allocation that must be used for eligible activities during COVID-19 under the Major Disaster Declaration.

To further identify the emergent needs of older adults and caregivers, Sourcewise administered the 2021 COVID_19 Impact Survey (2021 COVID-19 Survey). The 2021 COVID-19 Survey focused on four key areas (1) access to services/resources, (2) digital divide and inclusion, (3) social isolation and loneliness and (4) caregiver support. Each service identified in the RFP was identified through the COVID-19 Survey as areas of support needed by older adults and informal caregivers in our planning service area (PSA).

The 2021 [COVID-19 Impact Survey Summary](#) and results are available in [Appendix C](#).

All interested applicants who serve Santa Clara County, whether public, private, non-profit, or profit-making agencies are eligible organizations. Contract awards made to for-profit organizations must be approved by the California Department of Aging (CDA). All recipients of funds that are private agencies must be incorporated to safeguard the interests of the CDA and Sourcewise. Private individuals are not eligible to apply for this grant.

During 2022-2023 fiscal year beginning on August 01, 2022, through July 30, 2023, Sourcewise invites the submission of proposals to secure contracts with qualified seniors and informal caregiver service providers through the ARPA IFB/RFP. The ARPA funding is available for one year renewal following the initial contract term. ARPA funding is available for expenditure through July 30, 2024. Interested applicants through the IFB/RFP submission process should be able to:

- Successfully respond to and the Invitation for Bid (IFB)/ Request for Proposal (RFP) application submission requirements.
- Identify how the funding will be used to respond to the evolving needs of older adults, adults with disabilities, and informal caregivers due to COVID-19.
- Successfully respond to the Older American Act (OAA) Title III service funding specifications and program specific requirements outlined in the IFB/RFP Procedure. Reference Section II. Funding Specifications A - H.

- Clearly identify how the applicant plans to advance equity and address systemic racism by demonstrating how the needs of California’s diverse and underserved communities will be responded to with the awarded ARPA funding.
- Adhere to Sourcewise and State ARPA data reporting requirements including monthly unit of service and unduplicated clients served.

Sourcewise invites the submission of proposals for the provision of the following supportive service projects to communities that are within the definition of greatest economic and greatest social need:

- (1) Vulnerable Older Adult Case Management (Title III B Case Management):
- (1) Transportation Services for Older Adults (Title III B Transportation)
- (1) Grocery Pick-up or Delivery to Older Adults (Title III B Cash/Material Aid)
- (1) 60+ At Home Supportive Services (Title III B Homemaker Services/Title III B Personal Care Services)
- (1) Older Adult Recreation & Connectivity Project (Title III B Senior Center Activities)
- (3) Greater Access Family Caregiver Support Services (Title III E Family Caregiver Support Program):
 - III-E Respite In-Home or III-E Respite Out of Home
 - III-E Support Group
 - III-E Caregiver Assessment and III-E Public Information on Caregiving

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SECTION I. INTRODUCTION

Sourcewise is a nonprofit organization designated by the State of California Department of Aging as the Area Agency on Aging (AAA) for Santa Clara County. As the AAA, Sourcewise is responsible for planning, advocacy, coordination, and community development for senior programs and the contract administration of Older Americans Act and Older Californians Act funds allocated for seniors and caregivers in Santa Clara County. The goal of Sourcewise is to provide a comprehensive system of services to older persons to allow them to live independently and avoid inappropriate institutional placement.

SECTION II. FUNDING SPECIFICATIONS

Section II includes the various Older American Act (OAA) Title III services which are eligible under the ARPA IFB/RFP to apply for. Please read through each funding specification carefully.

A. VULNERABLE OLDER ADULT CASE MANAGEMENT FUNDING SPECIFICATION

OAA Service Name: Title III-B, Case Management

Program Definition & Goal: Provide case management services for underserved and impacted older adult residents of West, Central, East and Southern regions of San Jose in Santa Clara County or northern/western areas of Santa Clara County. Services include a comprehensive assessment of a frail older adult's needs to ensure access to vital services and essential resources in the community, allowing them to remain safely in their own home, improve their well-being, and avoid premature institutionalization.

Service Definition: The Title III-B Supportive Services Program enables older adults to access services that address functional limitations, promote socialization, continued health and independence, and protect elder rights. Together, these services promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

Service Type: Registered¹

Area to be Served, contract 1: Targeted geographic region in Santa Clara County including but not limited to West, Central, East and Southern regions of San Jose in Santa Clara County or northern/western areas of Santa Clara County.

Service Area Target Population, contract 1: All contracts are required to provide services to communities disproportionately affected by COVID-19. An emphasize must be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

All contracts must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Scope of Service, Funding & Service Standard:

Funding available²: \$80,000

¹ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

² American Rescue Plan Act funding

Maximum funding request: \$80,000

Minimum units delivered based on funding request: 2,000 hours

Unduplicated Persons Served estimate*: 110

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 hour = 1 unit of service

Required Match: 15% cash or in-kind cash contribution

III-B Case Management

Program Specific Scope of Service:

1. Provider shall demonstrate that case management personnel meet the following education and experience requirement:

Bachelor of Arts (B.A.) and three years of case management work experience with the elderly, or a master's degree from an accredited school of social work, psychology, counseling, rehabilitation, and one year of case management experience with the elderly.

Each case manager shall receive a minimum of one hour of case conferencing supervision monthly. This responsibility may be subcontracted and shall be provided by an individual with a graduate degree from an accredited school of social work, nursing, psychology, counseling, or rehabilitation. The supervision must be reflected in the budget.

2. Each case manager shall coordinate service authorization and arrangement through the development and maintenance of a comprehensive list of resources available for seniors within the designated service area.
3. The following four activities can be recorded as 1 hour or unit of service:
 - a. **Comprehensive Assessment:** To collect information about a client with multiple needs (social, environmental, physical or mental) and determine the necessary supportive or other appropriate services to meet those needs.
 - b. **Care Planning:** To write an individualized plan of care and services under a case management system based on a comprehensive assessment of the client's condition and/or resources.
 - c. **Service Authorization and Arrangement:** To obtain services according to an individualized care plan by coordinating existing services, authorization for payment of services, or purchase of services.
 - d. **Case Monitoring:** To determine quality and effectiveness of services provided to a client according to an individualized care plan and to maintain periodic client contact to determine if change has occurred; and to take appropriate action as necessary.
4. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.

5. Reporting Requirements:

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts, units of service. When possible, the agency should collect client demographics to identify impact of service on communities of need during COVID-19.

Client demographic characteristics include:

- Name
- Birthdate
- Zip code
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

B. TRANSPORTATION FOR OLDER ADULTS FUNDING SPECIFICATION

OAA Service Name: Title III-B Transportation

Program Goal: Support a community-based organization or Federally Qualified Health Centers (FQHC) to provide and/or increase availability of nonemergency transportation services to access health and medical services and/or nonemergency transportation for adults 60+ to shop for essential items, attend religious/spiritual services, and/or attend recreation/socialization services. Transportation services may also include disbursement of travel stipends to provide transportation services.

Service Definition: The Title III-B Supportive Services Program enables older adults to access services that address functional limitations, promote socialization, continued health and independence, and protect elder rights. Together, these services promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

Service Type: Non-Registered³

Area to be Served, contract 1: Santa Clara County, West/Central/South/East San Jose region or northern Santa Clara County

Service Area Target Population: All contracts are required to provide services to communities disproportionately affected by COVID-19. An emphasize must be made to provide services to vulnerable

³ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

All contracts must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Scope of Service, Funding & Service Standard:

Funding available⁴: \$75,000

Maximum funding request: \$75,000

Minimum units delivered based on funding request: 3,000 one-way rides

Unduplicated Persons Served estimate*: 400

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 one-way ride = 1 unit of service

Required Match: 15% cash or in-kind cash match contribution

Transportation Services

Program Specific Scope of Service:

1. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion and coordinate community resources and linkages for participants are required.
2. Applicant will provide transportation services essential to the client's health and safety but should be triaged based on the client's potential risk may include the use of subsidized taxi and ADA paratransit rider subsidy or stipends for transportation services.
3. Applicant is either a community-based organization or Federally Qualified Health Centers (FQHC) which has an established transportation program to provide and/or increase availability of nonemergency transportation services to access health and medical services and/or nonemergency transportation for adults 60+ to shop for essential items, attend religious/spiritual services, and/or attend recreation/socialization services.

4. Reporting Requirements:

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts and actual monthly units of service delivered.

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum in the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

⁴ American Rescue Plan Act funding

C. GROCERY PICK-UP OR DELIVERY TO OLDER ADULTS FUNDING SPECIFICATION

OAA Service Name: Title III-B Cash/Material Aid

Program Goal: Prepare and administer assistance to adults 60 and older in the form of groceries (contents of the bag include food items without defined meal intent) to eligible participants home if delivered and/or centralized pick-up location where there is a high number of older adults in need of services.

Service Definition: The Title III-B Supportive Services Program enables older adults to access services that address functional limitations, promote socialization, continued health and independence, and protect elder rights. Together, these services promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

Service Type: Non-Registered⁵

Area to be Served, contract 1: Santa Clara County or targeted geographic region.

Service Area Target Population: All contracts are required to provide services to communities disproportionately affected by COVID-19. An emphasis must be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

All contracts must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Scope of Service, Funding & Service Standard:

Funding available⁶: \$100,000

Maximum funding request: \$100,000

Minimum units delivered based on funding request: 5,000 assistances

Unduplicated Persons Served estimate*: 500

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 Assistance = 1 unit of service

Required Match: 15% cash or in-kind cash match contribution

Title III B Cash/Material Aid

Program Specific Scope of Service:

1. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion and coordinate community resources and linkages for participants are required.
2. Awarded applicant must have an established policy & procedure that includes determining eligibility (i.e., older adults 60 years, resident of Santa Clara County) to ensure that the bags of

⁵ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

⁶ American Rescue Plan Act funding

groceries distributed or delivered are to the target population required based on the funding specifications for Older American Act services.

3. Awarded applicant has experience with purchase food in bulk which could then be assembled into bags/boxes of food for distribution to older adults. If applying to deliver bags of groceries, the awarded applicant has experience and/or the means to transport the groceries and deliver to older adults.
4. Unallowable activities with Title III- B Cash/Material Aid Relief grant funds awarded included:
 - a. Issuing cash grants to qualified older adults and/or family caregivers as financial assistance to pay for legal support, utilities, housing, medical needs, etc.
 - b. Issuing gift cards to qualified older adults and/or family caregivers to purchase groceries, electronic devices, etc.

5. **Reporting Requirements:**

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts and actual monthly units of service delivered.

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum in the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

D. 60+ AT HOME CARE SERVICES FUNDING SPECIFICATION

OAA Service Name: Title III B Homemaker Services or Title III B Personal Care Services

Supportive Services Name & Definition*:

1. **Homemaker Services:** Assistance such as preparing meals, shopping for personal and household items, managing money, using the telephone or doing light housework.
2. **Personal Care Services:** Personal assistance, stand-by assistance, supervision or cues. (such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming).

*Bid for either Supportive Service outlined above are allowable in response to the ARPA RFP.

Service Type: Registered⁷

Program Goal: Provide or coordinate personal care or homemaker assistance to adults 60 and older. This may include grocery shopping, medication/prescription pick-up, preparing meals, shopping for personal and household items, or light housework. Stipends for personal care and/or homemaker services (in-home) for the older adults is allowable. Adults 60 and older who do not have regularly scheduled in-home care services available to them are eligible to receive assistance.

The Older American Act, Title III B Supportive Services Program provide a variety of services to address functional limitations, maintain health and independence, and promote access to services.

Area to be Served: Santa Clara County or targeted geographic region

Service Area Target Population: All contracts are required to provide services to communities disproportionately affected by COVID-19. An emphasize must be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

All contracts must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Scope of Service, Funding & Service Standard:

Funding available⁸: \$50,000

Maximum funding request: \$50,000

Minimum units delivered based on funding request: 1,750 hours

Unduplicated Persons Served estimate*: 75 - 100

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 hour = 1 unit of service

Required Match: 15% cash or in-kind cash match contribution

⁷ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birthday in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

⁸ American Rescue Plan Act funding

Supportive Services

Program Specific Scope of Service:

1. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion and coordinate community resources and linkages for participants are required.
2. Provider will provide client with assistance (Personal assistance, stand-by assistance, supervision or cues) with Activities of Daily Living (ADLs) and/or health-related tasks provided in a person's home and possibly other community settings (e.g. grocery shopping). Personal care may include assistance with Instrumental Activities of Daily Living (IADLs).
3. The provider shall coordinate with outside community resources and maintain a list of social and therapeutic services to which referrals can be made, to assist participants and their families with additional needs.
4. **Reporting Requirements:**
The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts, units of service. When possible, the agency should collect client demographics to identify impact of service on communities of need during COVID-19.

Client demographic characteristics include:

- | | |
|----------------|----------------------|
| ▪ Name | ▪ Sexual Orientation |
| ▪ Birthdate | ▪ Race |
| ▪ Zip code | ▪ Ethnicity |
| ▪ Gender | ▪ Poverty Status |
| ▪ Sex at Birth | ▪ Living Status |

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

E. OLDER ADULT RECREATION & CONNECTIVITY PROJECT FUNDING SPECIFICATION

OAA Service Name: Title III-B Senior Center Activities

Program Goal: Innovative service model designed to increase an adult 60+ knowledge and confidence with navigating and using a technological device with wi-fi/broadband connectivity to attain or maintain their physical and mental well-being. Programming should include technological device training and education and may also include programming like recreation, music, creative arts, physical activity, or education. Services may be delivered in-person, virtually, or combination. Services may include access to wi-fi/broadband connectivity to participate in supportive programming.

Service Definition: The Title III-B Supportive Services Program enables older adults to access services that address functional limitations, promote socialization, continued health and independence, and protect elder rights. Together, these services promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

Service Type: Non-registered⁹

Area to be Served, contract 1: West/East/South San Jose geographic region; or targeted geographic region in Santa Clara County; or Santa Clara County.

Service Area Target Population: All contracts are required to provide services to communities disproportionately affected by COVID-19. An emphasize must be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

All contracts must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Scope of Service, Funding & Service Standard:

Funding available¹⁰: \$60,000

Maximum funding request: \$60,000

Minimum units delivered based on funding request: 850 hours

Unduplicated Persons Served estimate*: 100

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 hour = 1 unit of service

Required Match: 15% cash or in-kind cash match contribution

Senior Center Activities

Program Specific Scope of Service:

1. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities,

⁹ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

¹⁰ American Rescue Plan Act funding

facilitate discussion and coordinate community resources and linkages for participants are required.

2. Established method for tracking equipment (technological devices) and lending procedure to adhere with Sourcewise equipment tracking and purchasing policy. Agency is required to submit equipment model numbers, cost, age and condition of equipment that has been purchased with ARPA funding. Equipment is monitored annually.
3. The provider shall coordinate with outside community resources and maintain a list of social and therapeutic services to provide participants a list of available resources to access services for additional needs.

4. Reporting Requirements:

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts and actual monthly units of service delivered.

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum in the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

F. GREATER ACCESS FAMILY CAREGIVER SUPPORT: RESPITE SERVICES FUNDING SPECIFICATION

OAA Service Name: Title III-E Family Caregiver Support Program (FCSP) Services, Respite In-Home or Respite Out-of-Home for Caregivers of Older Adults

Program Goal: The National Family Caregiver Support Program (FCSP) is designed to establish networks that provide supportive services for family caregivers, grandparents, and older individuals who are relative caregivers.

Service Definition, Service Type and Unit of Service Type:

Potential applicants should be prepared to apply for either Title III E FCSP services listed below within the proposal.

The definition of the Title III E FCSP services are:

1. **FCSP Respite In-Home:** Provide the care receiver day or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer to prevent wandering and health or safety incidents in the care recipient's home.
 - o **Service Type:** Registered¹¹
 - o **Unit of Service Type:** 1 Hour = 1 unit of service

^{6,7} American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

2. **FCSP Respite Out-of-Home:** A FCSP service provided where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities to further support the caregiver.
 - o **Service Type:** Registered¹²
 - o **Unit of Service Type:** 1 Hour = 1 unit of service

Area to be Served, contract 1 (FCSP Respite Out of Home or FCSP Respite In-Home): Santa Clara County or targeted geographic region.

Service Area Target Population contracts 1:

Caregivers must be 18 years of age or older. Applicant must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Care receivers must be age 60 years or older, or individuals of any age with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction younger than 60 years of age. Applicant must have established methods, other than the use of a means test, to provide services to all eligible an older adult's family caregiver.

Scope of Service, Funding & Service Standard:

FCSP Respite Out-of-Home or FCSP Respite In-Home:

Funding available¹³: \$125,000

Maximum funding request: \$125,000

Minimum units delivered based on funding request: 900 hours

Unduplicated Persons Served estimate*: 100

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Required Match: 35% cash or in-kind cash match contribution

FCSP Respite Services

Program Specific Scope of Service:

1. Applying agency staff shall be trained and experienced in working with caregiver and care recipients who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.
2. Bidder shall demonstrate appropriate local caregiver community-based agency & county-based linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication of services to caregivers in Santa Clara County.
3. Bidder has experience assisting caregivers with health, nutrition, and financial literacy, and in making decisions and solving problems related to their caregiving roles; physical health, psychological, social support, and training needs; financial resources relative for caregiving; and strengths and weaknesses within the immediate caregiving environment and the caregiver's extended informal support system.
4. Bidders applying to provide Title III E Respite In-Home has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency

¹³ American Rescue Plan Act funding

preferences, caregiving abilities; Organization has experience recruiting, screening, and maintaining a listing of dependable, qualified, self-employed homemaker or respite care workers who may be matched with caregivers.

5. **Reporting Requirements:** The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts, units of service. When possible, the agency should collect client demographics to identify impact of service on communities of need during COVID-19.

Caregiver demographic characteristics include:

- Name
- Birthdate
- Zip code
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Employment Status
- Relationship to the Care Recipient

Care Recipient demographic characteristics include:

- Name
- Birthdate
- Zip code
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Relationship to the Caregiver

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

G. GREATER ACCESS FAMILY CAREGIVER SUPPORT: SUPPORT GROUP FUNDING SPECIFICATIONS

OAA Service Name: Title III-E Family Caregiver Support Program (FCSP) Services, Support Group for Caregivers of Older Adults

Program Goal: The National Family Caregiver Support Program (FCSP) is designed to establish networks that provide supportive services for family caregivers, grandparents, and older individuals who are relative caregivers.

Service Definition:

FCSP Support Group: An FCSP Support Service provided to a group of 3 - 12 informal caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving, and to improve decision-making and problem-solving skills related to their caregiving responsibilities.

Service Type: Registered¹⁴

Unit of Service Type: 1 Hour = 1 unit of service

Area to be Served, contract 1 (FCSP Support Group): Santa Clara County or targeted geographic region.

Service Area Target Population contracts 1:

Caregivers must be 18 years of age or older. Applicant must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Care receivers must be age 60 years or older, or individuals of any age with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction younger than 60 years of age. Applicant must have established methods, other than the use of a means test, to provide services to all eligible an older adult's family caregiver.

Scope of Service, Funding & Service Standard:

FCSP Support Group:

Funding available¹⁵: \$30,000

Maximum funding request: \$30,000

Minimum units delivered based on funding request: 300 hours

Unduplicated Persons Served estimate*: 25

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Required Match: 35% cash or in-kind cash match contribution

FCSP Support Group Services

Program Specific Scope of Service:

¹⁴ American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

¹⁵ American Rescue Plan Act funding

1. Applying agency staff shall be trained and experienced in working with caregiver and care recipients who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.
2. Bidder shall demonstrate appropriate local caregiver community-based agency & county-based linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication of services to caregivers in Santa Clara County.
3. Bidder has experience assisting caregivers with health, nutrition, and financial literacy, and in making decisions and solving problems related to their caregiving roles; physical health, psychological, social support, and training needs; financial resources relative for caregiving; and strengths and weaknesses within the immediate caregiving environment and the caregiver's extended informal support system.
4. Bidding agency has a qualified staff member has the qualifications and competency to lead a caregiver support group at minimum one time in a calendar month throughout the duration of the grant period.
5. Bidding agency has access to a facility which an in-person informal caregiver support groups may be conducted at least one time in a calendar month throughout the duration of the grant program. Or, if the caregiver support group is going to be virtual, the bidding agency has access to secure web-based application which the caregivers may access at least one time in a calendar month throughout the duration of the grant program to participate in the caregiver support group.
6. **Reporting Requirements:** The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts, units of service. When possible, the agency should collect client demographics to identify impact of service on communities of need during COVID-19.

Caregiver demographic characteristics include:

- | | |
|----------------------|--------------------------------------|
| ▪ Name | ▪ Ethnicity |
| ▪ Birthdate | ▪ Poverty Status |
| ▪ Zip code | ▪ Living Status |
| ▪ Gender | ▪ Employment Status |
| ▪ Sex at Birth | ▪ Relationship to the Care Recipient |
| ▪ Sexual Orientation | |
| ▪ Race | |

Care Recipient demographic characteristics include:

- | | |
|----------------------|---------------------------------|
| ▪ Name | ▪ Race |
| ▪ Birthdate | ▪ Ethnicity |
| ▪ Zip code | ▪ Poverty Status |
| ▪ Gender | ▪ Living Status |
| ▪ Sex at Birth | ▪ Relationship to the Caregiver |
| ▪ Sexual Orientation | |

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

H. GREATER ACCESS FAMILY CAREGIVER SUPPORT: CAREGIVER ASSESSMENT & PUBLIC INFORMATION FUNDING SPECIFICATIONS

OAA Service Name: Title III-E Family Caregiver Support Program (FCSP) Services, Caregiver Assessment & Public Information on Caregiving for Caregivers of Older Adults

Program Goal: The National Family Caregiver Support Program (FCSP) is designed to establish networks that provide supportive services for family caregivers, grandparents, and older individuals who are relative caregivers.

Service Definition, Service Type & Unit of Service Type:

Potential applicants should be prepared to apply for the two FCSP services listed below within one consolidated proposal in response to the ARPA RFP.

The definition of the two FCSP services are:

- 1. FCSP Caregiver Assessment:** An FCSP Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated; and will explore options and courses of action for caregivers by identifying the: (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; and (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system.
 - o **Service Type:** Registered¹⁶
 - o **Unit of Service Type:** 1 Hour = 1 unit of service
- 2. FCSP Public Information on Caregiving:** An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter). Increase awareness of existing and new services to support informal caregivers in Santa Clara County.
 - o **Service Type:** Non-registered¹⁷
 - o **Unit of Service Type:** 1 activity = 1 unit of service

Area to be Served, contract 1 (FCSP Caregiver Assessment & FCSP Public Information on Caregiving): Santa Clara County or targeted geographic region.

Service Area Target Population contracts 1:

Caregivers must be 18 years of age or older. Applicant must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Care receivers must be age 60 years or older, or individuals of any age with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction younger than 60 years of age. Applicant must have established methods, other than the use of a means test, to provide services to all eligible an older adult's family caregiver.

^{16, 10} American Rescue Plan Act (ARPA) funding Older American Act reporting requirements regardless of the service type including non-registered and registered Title III or Title VII services will collection information on Name Zip Code, and Birth Day in order to establish eligibility to fulfill the reporting requirements outlined in the ARPA Procedure. Awarded provider will report monthly on the total number of older adults receiving services; the type of service administered; and the total number of units of service.

Scope of Service, Funding & Service Standard:

FCSP Caregiver Assessment & FCSP Public Information on Caregiving Funding:

Funding available¹⁸: \$91,749

Maximum funding request: \$91,749

Minimum units delivered based on funding request:

- FCSP Caregiver Assessment: 200 Hours
- FCSP Public Information on Caregiving: 10 Activities

Unduplicated Persons Served estimate*:

- FCSP Caregiver Assessment: 80
- FCSP Public Information on Caregiving: 500

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Required Match: 35% cash or in-kind cash match contribution

FCSP Services

Program Specific Scope of Service:

1. Applying agency staff shall be trained and experienced in working with caregiver and care recipients who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.
2. Bidder shall demonstrate appropriate local caregiver community-based agency & county-based linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication of services to caregivers in Santa Clara County.
3. Bidder has experience assisting caregivers with health, nutrition, and financial literacy, and in making decisions and solving problems related to their caregiving roles; physical health, psychological, social support, and training needs; financial resources relative for caregiving; and strengths and weaknesses within the immediate caregiving environment and the caregiver's extended informal support system.
4. Bidder shall encourage coordination amongst staff for sharing of resources, training activities, and referrals.
5. The bidder's staff and/or volunteers shall coordinate service authorization and arrangement through the development and maintenance of a comprehensive list of resources available for caregivers within the designated service area.
7. **Reporting Requirements:** The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts, units of service. When possible, the agency should collect client demographics to identify impact of service on communities of need during COVID-19.

¹⁸ American Rescue Plan Act funding

Caregiver demographic characteristics include:

- Name
- Birthdate
- Zip code
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Employment Status
- Relationship to the Care Recipient

Care Recipient demographic characteristics include:

- Name
- Birthdate
- Zip code
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Relationship to the Caregiver

Monthly data reporting is required. At minimum, the awarded agency will report ARPA data required to Sourcewise. At minimum the data report submitted must include:

- i. Total number of older adults receiving services
- ii. Type of service, including name and category of service provided
- iii. Total number of units of service provided

SECTION III. GLOSSARY OF TERMS

ARPA: American Rescue Plan Act [Older Americans Act], P.L. 117-2

AAA: Area Agency on Aging is an identifiable private nonprofit or public agency designated by the Department of Aging which works for the interest of older Californians within the PSA (Planning and Service Area). This agency engages in community planning, coordination, and program development, and, through contractual arrangements, provides a broad array of social and nutritional services. Sourcewise is the designated AAA in Santa Clara County.

Bidder: The applicant organization responding to the Request for Proposal. This term is used interchangeably with ‘applicant’ and ‘service provider.’

Care Recipient: an older individual who is determined to be functionally impaired because the individual: is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

CDA: California Department of Aging

Contract: An official document binding both parties regarding the Title III ARPA program and services to be provided. The selected proposed budget and Title III program will become a part of the contract including requirements and agreement to comply with Older American Act, CFR, CCR and provisions required by Sourcewise.

Evaluation Committee: A team of evaluators comprised of members of the Sourcewise Board of Directors and Sourcewise Advisory Council that assess and score RFP submissions based on a predetermined proposal grading rubric.

Family Caregiver: an adult family member, or another individual, who is an informal provider of in-home and community care to an older individual who is 60 years of age or older.

Focal Point: A designated senior center in PSA 10 that provides a broad spectrum of senior services.

Greatest Economic Need: Having an income at or below the federal official poverty line defined by the federal Bureau of the Census and published annually by the Department of Health and Human Services.

Greatest Social Need: The need caused by noneconomic factors which include any of the following:

- (1) Physical and mental disabilities.
- (2) Language barriers.
- (3) Cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, HIV status, sexual orientation, gender identity, or gender expression that does the following:
 - a) Restricts the ability of an individual to perform normal daily tasks.
 - b) Threatens the capacity of an individual to live independently.

Matching Contributions: The cash and/or in-kind contribution made by the bidding organization that qualifies as match for the Title III service.

Minority Provider: A nonprofit organization whose controlling board is comprised of at least 51% minority individuals who are African American, Hispanic, American Indian/Native Alaskan/Native Hawaiian, and/or Asian American/Pacific Islander.

Minority: A person of color who is any of the following:

- a. Black/African American: a person having origins in any of the Black racial groups of Africa.
- b. Hispanic: a person of Mexican, Puerto Rican, Cuban, central or South American, or other Spanish or Portuguese culture or origin regardless of race.
- c. Asian/Pacific Islander: a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Trust Territories of the Pacific including the Northern Marianas.
- d. American Indian/Alaskan Native: an American Indian, Eskimo, Aleut, or Native Hawaiian.

Non-Profit: Any agency, institution, or organization that has been granted tax-exempt status by the Internal Revenue Service.

Non-registered Services: Are those services where it is not practical to collect client specific information or when requiring the client to register may serve as a barrier to receiving service.

Older Americans Act: The federal funding source for supportive service programs funded under this Request for Proposal.

Older Californians Act: The state funding source for Community-Based Services Programs.

Open and Competitive Process: The formal Sourcewise process followed to solicit proposals for the provision of services.

PSA: Planning and Service Area (PSA). PSA defines the geographic region which the AAA encompasses.

Registered Services: Means data collection and reporting requirements including unduplicated client counts by characteristics, units of service, including in some cases ADLs/IADLs. Registered Services are client specific data using participant identification numbers for each client.

Request for Proposal (RFP): An official document that requests community organizations to respond to a formal invitation to provide a specific program of services. It contains the terms and conditions an operating organization must comply with in order to fulfill its contract with Sourcewise.

Service Provider: A term used to describe the bidding organization and used interchangeably with the 'bidder' and 'applicant'.

Subcontractor: The legal entity that is identified in the bidders OAA ARPA application to carry out part of the award to meet the unit of service requirements and/or program objectives outlined in the IFB/RFP Procedure. A subcontractor is upheld to similar program/administrative requirements as outlined by in the Sourcewise contract, if awarded.

Target Population: Persons 60 years and older who are disproportionately affected by COVID-19 including the greatest social need, the greatest economic need, with particular attention to low-income minority older individuals, older individuals with Limited English Proficiency (LEP), LGBTQ+ older adults and older individuals residing in rural areas. All contracts are required to provide services to communities disproportionately affected by COVID-19.

Unit of service: The activity which describes the type of service to be contracted for; all Sourcewise funded programs must provide a required number of units for the program area.

Unduplicated Persons Count: Unique count of clients who receive services between August 01, 2022 – July 30, 2023. Agency's submitting proposals are required to include an unduplicated person count to provide services. Reporting requirements are described and nonnegotiable for registered and non-registered ARPA funded Older American Act services.

Vendor: A legal entity which applies or receives funding to sells goods and service for Area Agency/subcontractor to benefit the consumers (older adults and caregivers). As it relates to the RFP process vendors are not responsible for carrying out administrative/programmatic requirements of the program, unless otherwise negotiated if awarded.

Voluntary Contributions: Providing clients with the opportunity to contribute monetarily to the cost of the service/program provided by the successful bidder. The successful bidder should (a) inform the client of the opportunity to voluntarily contribute to the cost of service, including but not limited to the cost-of-service delivery, related activities to facilitate access to meals, and/or supportive services of the service (b) describe the amount of suggested client contribution and how it was determined, and (c) explain the method used to collect and record client contributions.

SECTION IV. AAA TECHNICAL ASSISTANCE AND COORDINATION¹⁹

- (a) Sourcewise shall furnish information in a timely manner and provide technical assistance, both on-site and through written communications, to service providers under contract with the AAA. The assistance shall be based upon both of the following:
 - (1) The AAA's assessment findings of the service providers.
 - (2) Requests made by service providers.
- (b) In addition to (a), the AAA shall provide technical assistance to other organizations concerned with the needs of older individuals upon the request of such an organization.
- (c) **Sourcewise shall:**
 - (1) Undertake coordination activities designed to develop or enhance the development of community-based systems of care in, or serving, each community, as defined by the AAA, in the PSA. These coordination activities shall include, but not be limited to, all of the following:
 - (a) **Coordination with services provided under both of the following:**
 - (1) **Title VI, Part A:** Grants for Native Americans, commencing with 42 U.S.C. 3057b.

¹⁹ 22 CCR 7252

- (2) **Title VI, Part B: Grants for Supportive and Nutrition Services to Older Hawaiian Natives.**
 - (b) Programs described in 42 U.S.C. 3013
 - (c) The coordination of access, in-home and legal assistance services, with community-based organizations established to benefit individuals with Alzheimer’s disease and their families.
 - (d) Agencies that provide services related to health, social services, rehabilitation and mental health services.
- (2) **Require the service providers with which it contracts to both:**
 - (a) Coordinate services with other appropriate services available in the community.
 - (b) Ensure that no service constitutes a duplication of a service provided by other entities.
- (3) **Conduct efforts to facilitate both of the following:**
 - (a) The coordination of community-based long-term care services designed to allow individuals to stay in their homes.
 - (b) The involvement of long-term care providers in the coordination of community-based long-term care services.
 - (c) The community awareness of and involvement in addressing the needs of residents in long-term care facilities, including residential care facilities and skilled nursing facilities.

SECTION V. GENERAL INFORMATION FOR SOURCEWISE INVITATION FOR BID & REQUEST FOR PROPOSAL

- A. **Estimated Program Funding:** Proposals must be limited to the amount of funds that correspond to the specific program stated. Each of the allocations represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change. Funding is contingent upon the availability of federal funds.

Additionally, one-time-only funding may become available for this project; however, one-time-only funding is not guaranteed.

- B. **Ensuring Equity in Program Planning & Delivery:** Programs, services, and activities must be very specific and explicit about the communities they are attempting to address. “Communities of color” or generic “diversity” language weakens and takes power away from the recommendation and the groups we aim to serve. To be explicit in terminology provides power to the group that has been systemically underrepresented or misrepresented.

The strengths and assets of each community must be highlighted and used to help us to move in culturally appropriate and inclusive ways.

Systemic racism, ageism, able-ism, and sexism can only be eliminated through systemic solutions. Programs and/or services should strive to transform the systems that impact the lives of those most affected by systemic and institutionalized discrimination and who, therefore, have experienced the most profound and adverse impacts during COVID-19.

Programs and/or services should not unintentionally further exacerbate inequities experienced by some communities. View Appendix B.

- C. **Program Match:** Bidders may be required to provide a share of the program cost. The match must directly relate to the project and expansion activities being proposed. Matching requirements are contingent based on the specific project funding source and will be identified as a requirement in the Section II. Funding Specifications for each of the Title III or Title VIII services.

Matching Contribution Requirement by Title III Service for ARPA RFP:

- i. Title III B 15%
- ii. Title III C 15%
- iii. Title III D N/A
- iv. Title III E 35%

D. Program Support: Bidders are encouraged to assure that ARPA emergency service funding is not used to replace funds from non-federal sources. The intent of this funding is to serve as a catalyst to respond to the emergent needs of older adults and caregivers during COVID-19.

E. Equipment Monitoring and Availability: Submit the model numbers, cost, age and condition of equipment that has been purchased with ARPA funding and will be monitored annually.

Equipment/Property with per unit cost over \$5,000 or any computing devices, regardless of cost requires justification from the Contractor and approval from AREA AGENCY and must be included in its APRA approved budget.

F. Contract Period: The contract period for programs included in this RFP is a twelve-month period from August 01, 2022 through July 30, 2023. Yearly contract renewals up to one year following the initial contract year is allowable at the discretion of the AAA and subject to annual renegotiation and availability of federal funding. The renewal contract term is from August 01 through July 30.

G. Eligible Organizations: All interested applicants, whether public, private, non-profit or profit-making agencies are eligible organizations. Contract awards made to for-profit organizations must be approved by the California Department of Aging. All recipients of funds that are private agencies must be incorporated in order to safeguard the interests of the California Department of Aging and Sourcewise.

H. Multiple Contract Awards: Sourcewise reserves the right to enter multiple contracts for any program at a lesser amount than listed in the Request for Proposal specifications.

I. Negotiations: Sourcewise may require the applicant to participate in negotiations, and to submit revisions to pricing, technical information, and/or other items from their proposal(s) as may result from these negotiations.

J. Contingencies: Sourcewise reserves the right to issue an addendum or amendments to this RFP and to terminate this procurement process at any time.

SECTION VI. FEDERAL AND STATE PROGRAM REQUIREMENTS

The authorizing Federal and State statutes governing the RFP process and Sourcewise as an Area Agency on Aging are found in the Older Americans Act as amended in 2016, Title 22 of the California Code of Regulations, and Division 8.5 of the California Welfare and Institutions Code.

Before completing the proposal, bidders should review the minimum program requirements outlined in this section. All general OAA program requirements are defined. Bidders define the specific and measurable objectives to satisfy each goal requirement in the submitted proposal using the defined application template. Bidders are unable to modify the requirements; these requirements become a condition of any contract awarded for the service. Sourcewise may negotiate modifications after the bid/proposal that has been selected to assure that all necessary program requirements are met. The

awarded proposal will become a part of the contract agreement for services and monitored throughout the year by Sourcewise to ensure the minimum requirements for the award are satisfied.

A. Targeting:

(a) Sourcewise (and thereby the contracted providers of Sourcewise) shall target services to older individuals within the County of Santa Clara with the following characteristics:

- (1) Older individuals with the greatest economic need, with particular attention to low-income minority individuals.
- (2) Older individuals with the greatest social need, with particular attention to low-income minority individuals.
- (3) Older Native Americans.

(b) AAAs shall use outreach efforts to identify individuals eligible for assistance under federal law. Special emphasis shall be given to the following groups. Older individuals:

- (1) Who reside in rural areas.
- (2) Who have greatest economic need, with particular attention to low-income minority individuals.
- (3) Who have greatest social need, with particular attention to low-income minority individuals.
- (4) With severe disabilities.
- (5) With limited English-speaking ability.
- (6) With Alzheimer's disease or related disorders with neurological and organic brain dysfunction and the caretakers of these individuals.

(c) For the purposes of (a), targeting of services within the County of Santa Clara shall be addressed as follows:

- (1) Determine the number, location, and needs of older individuals with these characteristics.
- (2) Consider the needs of the targeted groups in planning the services to be included in the Area Plan.
- (3) If possible, locate the provision of services in areas where a significant number of the targeted groups resides.

Develop methods specific to the local community to serve the targeted group.

For the purposes of (b), outreach means to provide information and encouragement about existing services and benefits to individuals.

B. Coordination:

The bidder shall describe the formation and administration of cooperative agreements with local senior and caregiver community-based agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services in response to COVID-19.

C. Public Information and Outreach:

The bidder shall coordinate the development of information and outreach activities (in-person and virtual events), including distribution of printed/electronic materials co-branded with funding agency (Sourcewise) to promote services to target populations in the community.

Awarded bidder must ensure that programs and services are available to all older adults regardless of sexual orientation and gender identity. Evaluation of outreach efforts to gay, lesbian, bisexual, and transgender older adults will be included in the contract monitoring requirements.

D. Recruitment and Training:

Bidders must demonstrate recruitment and appropriate training of staff and volunteers to support and meet the minimum program requirements of the funded services.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be

required to support the Older Americans Act program and the kinds of tasks that will be performed by volunteers.

E. Client Input:

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

F. Client Contributions:

Bidders must provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OAA ARPA funded program.

Bidder shall describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

SECTION VII. LOCAL SOURCEWISE POLICIES

1. **Priorities and Preferences:** Preference will be given to those agencies meeting the definition of minority agency, specifically those applying for service provision to geographic areas with high concentrations of low-income minority elders and communities who have been disproportionality impacted by COVID-19.
2. **Single Agency Subcontracts with Minority Agencies:** Where a program is offered on a countywide basis for a single agency contract, preference will be given to agencies that subcontract with minority agencies/organizations for services to low- income vulnerable populations.
3. **Late Proposal Submissions or Revisions:** Proposals submitted after the deadline will not be accepted.
4. **Contract Award Requirements:** The following are additional contractual obligations for all Sourcewise contractors that will influence the submission of a proposal:
 - a. **Performance-Based Contracting:** Contract awards include a performance standard clause with a specific, negotiated unit cost, reimbursement rate and remedies if performance (quality or quantity) falls below a specified level in a specified period of time based on the awarded agency submitted proposal.
 - b. **Program, Fiscal Reporting, and Record Keeping:** Service providers will be required to submit monthly reports on various aspects of program activities in accordance with the Sourcewise and ARPA standard format. All records of the service provider relating to the contract award must be maintained at the project site or local office and be made available for Sourcewise to review as outlined in the contract agreement.

Service providers will be required to establish and maintain a financial management system that assures control over the use of contract funds in accordance with federal and state requirements.

All ARPA awarded service providers are required to submit monthly detailed fiscal reports on the 15th day of the month for the most recent month to request payment of contract funds. For example, October invoice is due on November 15th. All costs reported by the provider in monthly and final fiscal reports must be supported by appropriate accounting documentation.

- c. **Grievance Procedure:** The agency is required to submit a written grievance process for reviewing and attempting to resolve complaints of older individuals or caregivers receiving services funded by the ARPA in compliance with OAA requirements outlined in 22 CCR § 7400 and as defined by the AAA include in the process outlined below at minimum:
- i. Complaints may involve, but not be limited to, any or all of the following:
 1. Amount or duration of a service.
 2. Denial or discontinuance of a service.
 3. Dissatisfaction with the service being provided or with the service provider.
*If the complaint involves an issue of professional conduct that is under the jurisdiction of another entity, such as the California Medical Board or the State Bar Association, the complainant shall be referred to the proper entity.
 - ii. Ten-day time frames within which a complaint will be acted upon.
 - iii. Written notification to the complainant of the results of the review, including a statement that the complainant may appeal to the AREA AGENCY if dissatisfied with the results of the Contractor's review.
 - iv. Confidentiality provisions to protect the complainant's rights to privacy. Only information relevant to the complaint may be released to the responding party without the older individual's consent.
- d. **Information Integrity & Data Security:** The awarded bidder, including potential subcontractors and vendors shall have in place operational policies, procedures and practices to protect State information assets, including those assets used to store and access Personal Information (PI), Personal Health Information (PHI), and any information protected under the Health Insurance Portability and Accountability Act (HIPAA), (i.e. public, confidential, sensitive and/or personal identifying information).
- e. **Security Awareness Training:** The awarded bidder, potential subcontractors and vendor employees and volunteers must complete the required California Department of Aging Security Awareness Training within 30 days of the contract start date. Any new employees and/or volunteers hired throughout the duration of the contract are also required to complete the required training within the first 30 days. These details will be included in the awarded bidders contract agreement.
- f. **Transition Plan:** A transition plan is required to identify the bidder's organization plan for terminated and/or transfer services if required. The transition plan is required as part of the bidding application process.
- g. **Insurance:** Prior to commencement of any work any Agreement with Sourcewise, the bidding agency shall be required to obtain the following:
- **Liability Insurance:** procure and maintain comprehensive general liability insurance for the life of the agreement of no less than \$1,000,000 per occurrence for bodily injury and property damage combined. Higher limits may be required in cases of higher than usual risks.
 - **Workers' compensation and Employer Liability Insurance:** The bidding agency shall have in effect during the entire life of the proposed agreement to provide service, as prescribed by the laws of California and certificates of insurance, will be requested.
 - **Automobile liability,** including non-owned auto liability, of not less than \$1,000,000 for volunteers and paid employees providing services supported by the contract.
 - If applicable, or unless otherwise amended by future regulations, the provider shall comply with the Public Utilities Commission General order No. 115-F which requires higher levels of

insurance for charter-party carriers of passengers and is based on seating capacity as follows:

- \$750,000 if seating capacity is under 8
- \$1,500,000 if seating capacity is 8-15
- \$5,000,000 if seating capacity is over 15

- h. **Audited Financial Statements & Single Audit Requirement:** Service providers will be required to submit to Sourcewise an audit of expenditures made under the ARPA contract award. This audit must be conducted by an independent auditor or auditing firm in accord with federal guidelines and must specifically identify revenue, expenditures, matching funds and program income from the Sourcewise OAA ARPA funded project.

Contracts that expend \$750,000 or more in federal funds shall arrange for an audit to be performed as required by the Single Audit Act of 1984 (Public Law 98-502); the Single Audit Act Amendments of 1996 (Public Law 104-156); and 2 CFR 200.501 to 200.521 (formerly OMB Circular A-133).

The funding source (Federal Grantor) for the following programs is the U.S. Department of Health and Human Services, Administration for Community Living. Passthrough agency is Sourcewise.

- 93.044 American Rescue Plan, 2021, Supportive Services Older Americans Act Title III-B.
- 93.052 American Rescue Plan, 2021, Family Caregivers Older Americans Act Title III-E

- i. **Other Applicable Regulations:** Applicants must be in conformity with the rules and regulations of the U.S. Administration on Aging and other applicable Federal and State mandates.

j. **Contracts in Excess of \$100,000**

If all funding provided herein exceeds \$100,000, the bidder shall comply with all applicable orders and requirements issued under the following laws:

- Clean Air Act, as amended [42 USC 1857]
- Clean Water Act, as amended [33 USC 1368]
- Federal Water Pollution Control Act, as amended 33 USC 1251, et seq.]
- Environmental Protection Agency Regulations [40 CFR, Part 15] and [Executive Order 11738]
- Public Contract Code Section 10295.3
- Certification Regarding Lobbying Section 1352, title 31, United States code.

- k. **Contractors and Sub-contractors:** Contractors may implement service agreements or subcontracts with goods and/or service providers (vendor). Subcontractors must be qualified to provide the service purchased and to operate in compliance with program requirements and all subcontracts must be pre-approved by Sourcewise. Signed letters of agreement to participate must accompany the proposal. Copies of the final signed subcontracts and agreements must be submitted to Sourcewise with the contract. Subcontract and agreements must have the approval of Sourcewise before activation and the Contractor/Grantee must monitor the performance of the subcontractor.

5. Applicants will be required to conform to all applicable provisions of the law and regulations. These shall include, but are not limited to the following:

- Older Americans Act of 1965, as amended;
- Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970;
- Mello-Granlund "Older Californians Act" of 1996;
- California Code of Regulations, Title 22 (Social Security), Division 1.8 (California Department of Aging), Chapter 4 (Title III Programs-Program and Service Provider Requirements), §7630

- through §7638.13 (pages 174.21 through 174.27) of Register 2002, No. 2; 1-11- 2002;
- Code of Federal Regulations (CFR), Title 45, Part 74 (Administration Request for Proposals (RFP))
- OMB Circulars A-87, A-102, A-110, A-122, and A-133; Section 15630, Welfare & Institutions: https://obamawhitehouse.archives.gov/omb/grants_circulars
- Code Reporting Requirements for Elder & Dependent Adult Abuse;
- Federal Civil Rights Act of 1964, 1968 and 1991;
- Rehabilitation Act of 1973; State law contained in W&I Code, Section 9542;
- California Fair Employment and Housing Act;
- Education Amendments of 1972;
- Federal, State and County and regulations applicable to Affirmative Action and Sexual Harassment;
- Sourcewise Provider Manual;
- California Department of Aging (CDA) Program Memos available at www.aging.ca.gov/pm

For additional information regarding the RFP process reference the California Code Regulations [here](#).

For additional information related to program information reference the California Code Regulations [here](#).

Federal Regulations relating to the Older Americans Act can be reviewed [here](#).

For additional information related to federal Office of Management and Budget Administrative and Cost Policy circulars reference [here](#).

Bidders can review Sourcewise Policy & Procedure Manual, memoranda, and assessment/evaluation criteria and instruments with a written request submitted via regular mail or email to Sourcewise Chief Executive Officer, Aneliza Del Pinal (adelpinal@mysourcewise.com).

SECTION VIII: REQUEST FOR PROPOSAL GENERAL INFORMATION

I. SUBMISSION OF PROPOSAL

The program specific requirements for each service included in the ARPA Request for Proposal are available on the Sourcewise website at: <https://www.mysourcewise.com/about/grantees/>.

An application is required to be completed for each program. When the bidding agency submits the application, an original hard copy, plus four hard copies should be submitted in the order in which it is presented. One electronic version of the complete proposal should be submitted to ebrown@mysourcewise.com by the defined due date below.

The Sourcewise ARPA Application is available on the Sourcewise website at: <https://www.mysourcewise.com/about/grantees/>.

The bidder will bear all costs of developing the proposal and submitting one original and four copies to Sourcewise. Sourcewise reserves the right to reject all or part of any proposal if that proposal does not meet the minimum submission qualifications stated in the RFP document.

Each proposal shall include the following four sections:

- | | | | |
|-----|---------------------|-----|--------------------------|
| (A) | Program Description | (C) | Program Budget |
| (B) | Program Management | (D) | Supporting Documentation |

Proposals may be withdrawn from consideration by the bidder who has submitted a proposal but who no longer wishes to be considered at any time prior to award. To withdraw a proposal an authorized bidder representative must deliver a signed request of withdrawal by email to Elizabeth Brown, Sourcewise Area Planner at ebrown@mysourcewise.com identifying as an email of high importance.

II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below. The due dates are specific, please review carefully and plan accordingly. Detailed steps describing the RFP process is available on Page 28 – 30 of the procedure.

Timeline for ARPA Request for Proposal

Bidders Conference	Tuesday, May 10, 2022 10:30 a.m. – 12:30 p.m.
Letter of Intent Due	Friday, May 13, 2022 by 4p.m.
Due date for proposals (must be received by Sourcewise)	Tuesday, May 31, 2022 at 4 p.m.
RFP Evaluation	Thursday, June 02 – Thursday, June 30, 2022
Notification of contract award mailed & emailed	Tuesday, July 05, 2022
Deadline for appeals	Tuesday, July 12, 2022 at 4 p.m.
Contract negotiations and signature	Thursday, July 14 – Wednesday, July 27, 2022
Services delivery est. start date	Monday, August 01, 2022

III. STEP BY STEP INSTRUCTIONS

The following instructions correspond with each of the steps outlined above to successfully submit a proposal.

Step 1 Bidders Conference:

Attend the Bidders conference scheduled on Tuesday, May 10, 2022 at 10:30 a.m. via teleconference.

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[+1 661-271-0327,69277054#](tel:+1661271032769277054) United States, Santa Clarita

Phone Conference ID: 692 770 54#

To learn more about the purpose of a bidders conference visit:

<https://www.findrfp.com/Government-Contracting/bidders-conference.aspx>

Step 2 Letter of Intent Submission:

The Letter of Intent is required to be submitted by the bidder on/or before Friday, May 13, 2022 to Sourcewise at 4:00 p.m. electronically to Elizabeth Brown at ebrown@mysourcewise.com.

The authorized signature is acceptable in two formats: (1) ink signature and scanned or (2) signed electronically using DocuSign or Adobe Acrobat with authentic digital signature submit the signed Letter of Intent to Elizabeth Brown at ebrown@mysourcewise.com. All bidders must complete and return the letter of intent; partial submissions and alternative formats will not be accepted.

Step 3 Proposal Submission:

Complete paper & electronic proposals must be submitted to Sourcewise or they will not be considered for funding on Tuesday, May 31, 2022 at 4:00 p.m. The below submissions are required:

- **Emailed:** One (1) complete electronic proposal submitted by email to Elizabeth Brown at ebrown@mysourcewise.com.

- **Mailed:** One (1) original and four (4) hard copies should be delivered or mailed to Sourcewise at, 3100 De La Cruz Blvd, Suite 310, Santa Clara, CA 95054

Proposals submitted after this deadline will not be accepted. Postmarked or faxed submissions are not acceptable.

Step 4 Proposal Evaluation:

The Sourcewise RFP Evaluation Committee evaluates and scores the proposals based on the criteria outlined in the Request for Proposal and submits the recommendation to the Sourcewise Board of Directors. Members of the Evaluation Committee are comprised of Advisory Council members and Governing board members. The Evaluation Committee members will evaluate all proposals to determine responsiveness to this RFP. The committee will recommend selection of a candidate bidder for final approval and negotiation of a contract to the Sourcewise Board of Directors. Proposals will be evaluated on the bidder's ability to meet the specifications, terms, and conditions of the RFP. Each evaluation committee member scores each proposal independently using a predefined rubric that resembles the RFP Proposal Submission criteria outlined in Part (A) - Part (D) on page 30 - 34 of this document. Recommendations from the evaluation committee are based on the highest scores.

During the selection process, the Evaluation Committee may wish to interview bidders. Interviews will be for clarification purposes only. No new material will be permitted at that time.

RFP Recommendation:

The Evaluation Committee submits their final recommendation to the Board of Directors for contract award(s) and non-award(s).

Board of Directors Approval:

The Sourcewise Board of Directors makes the final decision to select the contractors for award and non-award(s).

Step 5 Notification of Award:

A notification will be sent to both successful and unsuccessful applicants. A notice of adverse determination will be provided by the AAA and will

1. Be in writing and delivered by either of the following methods:
 - Faxed or emailed with a mailed follow-up original.
 - Certified or overnight mail return receipt requested.
2. Describe the grounds for the adverse determination in sufficient detail to enable the applicant to respond.

Step 6 Deadline of Appeals and Process:

Must be made in writing to the CEO of Sourcewise and must identify which of the perceived deviations Sourcewise allegedly did not adhere to as specified in 22 CCR § 7704(c)(3)(a-c) within five business days of the notification of award, Tuesday, July 12, 2022 at 4 p.m.

Step 7 Contract Negotiations:

As part of the review process, the evaluation committee and the Board of Directors may require modifications or revisions to a proposal, including revisions to pricing, technical information, and/or other items from bidders proposal (s). This assures that all necessary program requirements are covered before the contract is signed.

Step 8 Service Begins:

This is the date on which funded services begin and the date for beginning program monitoring and evaluation.

SECTION IX: RFP SUBMISSION OF PROPOSAL GUIDANCE AND EVALUATION CRITERIA

Proposals will be evaluated according to the criteria outlined below for each section of the proposal. There is a possible 100 points (100%) available.

Part A I & II: Program Description (50 points)

I. Program description narrative must cover the following topics:

- Adequacy of plan and methodology to provide proposed services within required program specifications. (7 points)
- Adequacy of plan to provide equitable access to services for minority persons in greatest economic need proportionate to the total elderly population served. (7 points)
- Adequacy of funding requested to respond to community service needs as described in the IFB/RFP Procedure, minimum level of service. (5 points)
- Comparison of program objective and units of service to those specified in the RFP. (7 points)
- Structure of bidder's organization and staffing patterns of paid staff and volunteers and its potential impact on achievement of proposed objectives and serving target population in partnership with Sourcewise. (7 points)
- Adequacy of training plan for staff and volunteers. (2 points)
- Demonstration of appropriate bidder linkage and coordination with local community-based organizations and resources to increase cost effectiveness and reduce duplication of service. (4 points)
- Adequacy of public information and outreach plan to adequately publicize the program to the community and target population based on parameters outlined in RFP. (3 points)
- Capability of bidder process to work with and encourage client input in program evaluation. (4 points)
- Adequacy of bidder's plan to solicit and collect client contributions. (4 points)

II. Goals and objectives must be specific, measurable and attainable.

A. Targeting

Title III B Supportive Service Targeted Population definition

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery in response to COVID-19.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Service providers must show intent and methodology to serve the needs of:

- Age 75+
- Low Income (federal poverty)
- Minority
- Living Alone

Title III E Family Caregiver Support Program (FCSP) Targeted Population definition

Applicant must have established methods, other than the use of a means test, to provide services to all eligible family/informal caregiver. Caregivers must be 18 years of age or older. Applicant must demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Care receivers must be age 60 years or older, or individuals of any age with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction younger than 60 years of age.

Service providers must show intent and methodology to serve the needs of:

- Age 75+

- Low Income (federal poverty)
- Minority
- Living Alone

B. Staffing & Volunteers

Bidders must demonstrate recruitment and appropriate training of staff and volunteers to support and meet the minimum program requirements of the funded services.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kinds of tasks that will be performed by volunteers.

C. Coordination

The bidder shall describe the formation and administration of cooperative agreements with local senior and caregiver community-based agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services in response to COVID-19.

D. Public Information/Outreach

The bidder shall coordinate the development of information and outreach activities (in-person and virtual events), including distribution of printed/electronic materials co-branded with funding agency (Sourcewise) to promote services to target populations in the community.

Awarded bidder must ensure that programs and services are available to all older adults regardless of sexual orientation and gender identity. Evaluation of outreach efforts to gay, lesbian, bisexual, and transgender older adults will be included in the contract monitoring requirements.

E. Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

F. Client Contributions:

Bidders must provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OAA ARPA funded program.

Bidder shall describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

Part B: Program Management (23 points)

I. Program Management narrative must cover the following topics:

- Experience of bidder, particularly in providing the proposed services. (4 points)
- Experience of bidder in serving older persons and/or caregivers particularly the target population. (4 points)
- Adequacy of bidder's facility to accomplish the proposed program. (4 points)
- Adequacy of bidder's plan to self-evaluate and monitor proposed objectives in accordance with program requirements. (4 points)
- Capability of bidder's plan to obtain additional funding support from private and other public sources. (2 points)
- Adequacy of bidder's system of record keeping and data collection for evaluation purposes. (4 points)
- Status as a minority provider. (1 point)

Part C: Budget (18 points)

I. The program budget template is located on the Sourcewise website here:

<https://www.mysourcewise.com/about/grantees/>. The proposed program budget will be scored based on the agency's ability to include:

- Reasonable estimated cost of proposed program (3 points)
- Demonstrate reasonable allocation of bidders Title III B or Title III E proposed request for grant funds in the program budget to administer direct services, compared to administrative and indirect costs. (4 points)
- Description of cost-effective strategies, including policies and procedures of bidding agency as it relates to the total request for grant funds and program cost. (4 points)
- Percentage of the bidder's match and relativity of the match directly related to the project and expansion activities being proposed. (3 points)
- Comparison of total program costs with program objectives (outlined in Part A, II) and units of service for geographic area to be served. Reference objectives above to allocate costs to successfully meet objectives. (4 points)

II. General Program Budget Requirements:

One program budget must be submitted on the forms attached (C-1 through C-5) for each proposal application. The program budget must include all costs, both cash and in-kind, required to provide all service activities proposed.

The program budget must cover the entire contract period and include the requested dollar amount of ARPA funds, other sources of cash, anticipated program income (if expected) and the value of all donated services and materials.

If the program budget includes start-up costs of a one-time-only nature, please list these on a separate sheet of paper. This is in addition to including them in the program budget. Start-up costs should be identified using the proper budget category, source, and amount of anticipated expenditure.

III. Additional Budget Requirements:

On budget forms C-1 through C-5, the individual funding sources must be listed and the sum of all the funding sources must equal the Total Program Cost (column A) for each budget category. The funding sources are defined as follows:

1. **ARPA Funds Requested:** This column reflects the actual ARPA funding amount from Sourcewise. The total of this column must equal the amount of funding provided for the program as specified in the Section II. Funding Specifications of the applicable Title III service.
2. **Non-Federal Match:** This column reflects non-federal cash or in-kind resources received by the applicant and used to fulfill or exceed the local match requirement, as applicable. The non-federal cash or in-kind match requirement will be communicated in the Program Standard description. Non-Federal Match is not required for ARPA funding.

Example of Non-federal Matching Sources:

- a. Revenues from city, county and state sources;
 - b. Revenues from private organizations;
 - c. Individual contributions not tied to receiving service;
 - d. United Way revenues;
 - e. Revenue sharing;
 - f. Volunteer services, space, consultants, and any sources.
3. **Cash Match:** Non-federal cash received by the agency and used to fulfill the local match requirement, as applicable. Cash Match is required to apply for the applicable Title III and

Title VII programs with ARPA funding. The minimum required matching contribution is listed within Section II Funding Specifications of this procedure.

Matching Contribution Requirement by Title III Service:

- a. Title III B 15%
- b. Title III C 15%
- c. Title III D N/A
- d. Title III E 35%

- 4. **In-Kind Match:** Equivalent value of donated or volunteer services, supplies, etc. from nonfederal third-party sources and used to fulfill the local matching contribution requirement, as applicable. In-kind Match is not required for ARPA funding. It may also include the value of agency owned property utilized in the program.
- 5. **Program Income:** This column reflects the anticipated amount of funding or earnings to be received by the provider during the contract period from the following: client contributions for service, other individual donations rents, payments and residuals to the program for use of facilities, interest, etc.

Program income received as a direct result of the program must be used for costs directly related to that program and shall be spent before Sourcewise funds are applied. It cannot be used to meet the local match requirement.

- 6. **Other Resources:** This column reflects any other cash or in-kind governmental (public) or private resources (United Way, foundation grants, etc.), which are used in the program.

Budget Summary (Form C-1) should be completed after the detailed cost breakdown, forms C-2, C-3, C-4 and C-5. List by budget category for summary totals from Forms C-2 through C-5 for each funding source in columns B through E. Column A should reflect the total costs for each budget category and match the totals for each budget category in the detailed breakdown. Refer to the definition of each funding source as outlined above.

A detailed breakdown of budget categories (Forms C-2 through C-5) represents the detailed itemizations for each budget category. All entries should be rounded off to the nearest dollar. Detailed costs must be shown for each expenditure made in support of the program. The budget categories are included in the [Appendix A](#).

Part D: Supporting Documentation (9 points)

I. Include the following:

- Organizational Chart: Attach a copy of the agency's organization chart including the proposed program. (1 point)
- 501 (c)(3) designation letter from the IRS, if applicable. (1 point)
- Job Descriptions: Attach job descriptions of the staff that will be paid with the ARPA Title III funding. (1 point)
- Board of Directors roster (1 point)
- Insurance certification information including general liability, private vehicle insurance, project vehicle insurance, worker's compensation insurance. (1 point)
- Documentation of Emergency plan that can be activated in an emergency. (1 point)
- Submit the agency's written grievance process for reviewing and attempting to resolve complaints of older individuals. (1 point)
- Transition Plan for the termination and/or transfer of services as required as part of the bidding application process. (1 point)
- Plan for additional and/or decreased funding, including:

(1) Describe how additional funds would be used if additional funds become available. (.5 points)

(2) Describe how services would be reduced due to a reduction of funds. (.5 points)

The recommendation to the Sourcewise Board of Directors for award is based on the highest overall score out of 100 points.

SECTION X. TERMS AND CONDITIONS

A. Certification

By submitting a proposal, bidder certifies that it has fully read and understood this RFP and has full knowledge of the nature of this service, including scope and quality of work to be performed. Bidder also certifies that its proposal was prepared without prior understanding, agreement, or connection with any other bidder submitting a proposal for this RFP and is in all respects fair and without collusion or fraud, so that all proposals will result from free, open, and competitive proposing among all bidders.

B. Assignment and Guarantee

No assignment by the bidder of the contract or any part thereof, or of funds to be received hereunder, is binding unless Sourcewise has given written consent before such assignment. There is also no guarantee of a minimal amount of work or compensation for any bidder selected for contract negotiations.

C. Financial Responsibility for Proposal Costs

Sourcewise accepts no financial responsibility for any costs incurred by the bidder in responding to this RFP. Proposals will become the property of Sourcewise and may be used by the agency in any way deemed appropriate.

D. Clarification

Should discrepancies or omissions be found in this RFP or should there be a need to clarify this RFP, questions or comments should be directed to Elizabeth Brown, ebrown@mysourcewise.com no later than Friday, May 20, 2022 at 4 p.m. Sourcewise shall not be responsible for, nor be bound by any oral instructions, interpretations or explanations issued by any representative of the agency.

E. Discrimination

The bidder and all subcontractors must not discriminate, nor permit discrimination on any person on the grounds of race, national origin, sex, disability, sexual orientation, veteran status or any other legally protected classification, in their employment practices, in any of their contractual agreements, and/or in all services and accommodations that they offer the public or in their business operations.

F. Indemnification

Bidder, at its own expense and without exception, shall indemnify, defend and pay all damages, costs, expenses including but not limited to, attorney fees, and otherwise hold Sourcewise harmless, its officials, its officers, its employees and agents from any and all liability of any nature or kind arising out of or related to the preparation or presentation of a proposal in response to this RFP.

G. Gratuity Prohibition

Bidder shall not offer any gratuities, favors or anything of monetary value to any official, employee, or agent of Sourcewise for the purpose of influencing consideration of this proposal.

H. Contract provisions

If a contract is awarded, the selected bidder will be required to adhere to a set of general contract provisions contained in the Sourcewise contract, including but not limited to: (1) indemnification; (2) General liability insurance with limits of not less than \$1,000,000 per occurrence for bodily injury and property damage combined (higher limits may be required by Sourcewise in cases of higher than usual risks) (3) professional liability insurance of no less than \$1,000,000 as it appropriately relates to services

rendered; such coverage may include medical malpractices and/or errors and omissions; (3) automobile liability insurance, including non-owned auto liability, of not less than \$1,000,000 for volunteers and paid employees provided services supported by the Sourcewise contract; (5) workers compensation; (6) maintenance of necessary licenses; permits, and certificates; (7) recordkeeping; (8) non-discrimination; and adherence to all applicable federal, state and local laws. Exceptions will not be granted.

I. Right of Refusal

Sourcewise reserves the right to reject any and all proposals, or any part of any proposal, to postpone the proposal deadline date, to make an award in its own best interest, to award more than one grant, to amend the RFP and to change the amount of the grant award.

APPENDIX A: PROGRAM BUDGET CATEGORY DEFINITIONS

101 Personnel: List the exact number of paid or in-kind staff members used in support of the proposed program, their title, percentage of time in the program and annual salary at 100% or FTE (full-time equivalent). Any change of salary status anticipated during the contract period must be listed.

102 Payroll Taxes & 103 - Fringe Benefits: Enter the appropriate payroll taxes and employee benefit costs for paid staff. The rates for formulating totals should be shown. State if an employee is exempt. All benefits provided to paid staff must be shown as broken out on this form.

104 Travel: This category is for all staff or volunteer travel costs related to the program. Staff travel and operational travel (such as mileage paid for escort service) must be listed separately. Staff travel must be in support of the program. The mileage reimbursement rate for staff and operational travel must be shown under description of budget item, as follows
(Month miles cents Staff)

105 Training: This category refers to expenses incurred for paid staff and volunteer attendance at conferences, conventions and meetings that relate to the proposed program.

106 Equipment: Separate listings should be made in this category if equipment is to be purchased, or to be leased, and each item must be listed and described. If equipment is to be leased, indicate the cost per month. Also included in this category should be the cost of operations, repairs, and/or maintenance for equipment. Enter a separate listing for each item and indicate whether the cost is for operations, repairs and/or maintenance. Reference the applicable fiscal year Equipment Purchasing Policy and approval process. The purchasing approval threshold is \$5,000 per unit. Note all computing devices regardless of the per unit price requires AAA and State approval prior to purchasing. Include the value of in-kind contributions

107 Occupancy: Enter the cost and specifics of all building space and utilities charged to this program. Indicate square footage, monthly rent, and time duration of lease, if applicable. If utilities are not included in the rental agreement, indicate and list separately. In-kind contributions should be entered at the fair market value or rental rate.

108 Telephone: Enter the cost of telephone service necessary to support the program.

109 Consumable Supplies: Enter the cost of items which are regularly consumed, including: bank checks, accounting or program forms, paper and fluid for duplicating, pens, paper clips, etc.

110 Printing and Publications: Enter the cost of outside printing. If a special or regular printing or mailing is to be done, indicate as a separate line item (Project Brochure - 5,000 @ 12 cents per brochure). Enter the cost of publications that relate to the proposed program as a separate as a separate line item.

111 Postage: Enter the cost of postage for regular and special mailings.

112 Insurance: Record the cost of all insurance (except Workers Compensation or any employee health insurance) under this category, necessary to support the proposed program.

113 Other Costs: Enter additional cost items which cannot be assigned to any other category. Any item listed must be organization, amount, time period, and a brief description of the service must be included. Some examples of other costs include audit, accounting, taxes, licenses, legal services and advertising.

114 Indirect Costs: This category is used only when the program is to be administered by an operating organization which is multi-operational. Indirect costs are those (a) incurred for a common or joint purpose benefiting more than one cost objective, and (b) not readily identifiable with the program itself, but which are nevertheless incurred by the contractor. In order to budget indirect costs, it is preferred that the contractor have an established indirect cost rate approved by the Department of Health and Human Services.

Sourcewise will allow indirect costs up to a maximum of **10%** of direct costs, excluding in-kind contributions, capital equipment and contract services.

ENSURING EQUITY IN PROGRAM PLANNING & DELIVERY



Equity is a goal that can be reached through a pathway of equality. Aging and Disability Services' principles shall include, but not be limited to, the following:

- Equity must be embedded in decision-making during the formation stages of any programs and/or services.
- The strengths and assets of each community must be highlighted and used to help us to move in culturally appropriate and inclusive ways.
- Systemic racism can only be eliminated through systemic solutions. These pandemics only heightened and unveiled existing disparities; they did not create them.
- Programs, services, and activities must be very specific and explicit about the communities they are attempting to address. “Communities of color” or generic “diversity” language weakens and takes power away from the recommendation and the groups we aim to serve. To be explicit in terminology provides power to the group that has been systemically underrepresented or misrepresented.
- Programs and/or services should not unintentionally further exacerbate inequities experienced by some communities.
- There is intersectionality between race, class, gender, and sexual orientation. Therefore, recommendations should be guided by the principle that Californian is home to all residents throughout their lifespan, with particular emphasis in creating systems that are supportive and inclusive of people of all races, classes, genders, and sexual orientations.
- Systemic racism, ageism, able-ism, and sexism can only be eliminated through systemic solutions. Programs and/or services should strive to transform the systems that impact the lives of those most affected by systemic and institutionalized discrimination and who, therefore, have experienced the most profound and adverse impacts during COVID-19.

“The route to achieving equity will not be accomplished through treating everyone equally. It will be achieved by treating everyone justly according to their circumstances.”

— Paula Dressel, *Race Matters Institute*

We offer the following guiding questions in planning and implementation of aging and disability programs and/or services.

QUESTIONS

1. What needs, gaps, and/or organizational barriers are you addressing to further diversity, equity, and inclusion through your programs and/or services?
2. Who determined the basic needs, gaps, and/or organizational barriers to equity when designing the programs and/or services? How were they determined? (i.e. primary research, secondary research, key informant interviews, subject matter expertise)
3. Do the resulting programs and/or services take into account the cultures and languages of impacted communities? For example, in determining those needs, was key information (access to services, forms, teaching materials, social media, phone lines) collected directly from the communities and made available in-language and in-culture?
4. How do the data/research inform or support program and/or services planning and implementation? Did you refer to research conducted in a way that was/is inclusive and reflective of the demographic and cultural makeup of California?
5. How do the resulting programs and/or services build on the strengths and assets of the impacted communities?
6. Do the programs and/or services take into account impacts on, and the rights of, people with disabilities? Please refer to the [Olmstead Act](#) for guidance.

Survey Analysis
February 2022

SOURCEWISE 2021 COVID-19 IMPACT SURVEY SUMMARY

Acknowledgement

Sourcewise would like to acknowledge and thank several entities and individuals for contributing their time and effort to support the development and administration of the second COVID-19 specific survey, also known as the 2021 COVID-19 Impact Survey.

To begin, we extend our sincere gratitude and appreciation to the [Sourcewise Advisory Council](#), as its members provided valued perspective throughout the planning and development of the second iteration of survey questions and promotion of the survey throughout their respective networks and communities within Santa Clara County. Additionally, Sourcewise would like to thank the [Santa Clara County Division of Equity and Social Justice](#) & [Santa Clara County Public Health Department](#).

Sourcewise thanks Michael Briscoe, Ph.D. for donating his time and partnership with Sourcewise staff, Elizabeth Brown, to analyze the survey responses through the development of this report. Additionally, we thank the following Sourcewise team members including Linda Phillips, Sarah Qazi, Irene Venegas, and Carolyn Long for their assistance with collection of the surveys, volunteer coordination, and data entry.

We would like to also thank our individual volunteers who supported Sourcewise throughout this initiative to data enter paper survey responses, including:

- Parthavi Rachapudi
- Elizabeth Sands
- Kevin Vu
- Mai Tran
- Yanyan Zheng
- Alex Zhang
- Yu-Qui Zhou
- Juliet Chia
- Skylar On
- Tyler On
- Wilson On
- Thomas Chan
- Chassie Lai
- Cheston Lai
- Agatha Lee

Finally, Sourcewise thanks Santa Clara County dedicated service providers that partnered with Sourcewise to disseminate and promote the online and paper survey including:

- Asian American for Community Involvement (AACI)
- Alzheimer's Association
- Avenidas
- Bella Terra Senior Apartments
- Catholic Charities Kinship Resources
- Campbell Community Center
- City of Milpitas
- City of Sunnyvale
- Community Services Agency of Mountain View
- Hearts & Minds Activity Center
- John XXIII Community Center
- Live Oak Adult Services
- Los Gatos Recreation 55 Plus Program
- Mayfair Community Center
- Monticelli South County Property
- Mountain View Senior Center
- Plum Tree Senior Apartments
- Santa Clara County, Senior Nutrition Program
- Santa Clara Valley Healthy Partnership (SCVHP), Community Based Adult Services (CBAS)
- Saratoga Area Senior Services Center
- San Jose State University Timpany Center
- Senior Planet @ Avenidas
- Sycamore Glen Senior Apartments
- Health Trust
- West Valley Community Services Agency
- Wheeler Manor Senior Apartments



- Loaves and Fishes
- Martha's Kitchen

- Yu Ai Kai

Background

In September 2020, Sourcewise conducted its first [COVID-19 Shelter in Place Impact Survey](#) to understand the needs of older adults, caregivers, and individuals with disabilities in Santa Clara County.

Sourcewise partnered with 24 local community-based organizations and county officials to collect 1,700 responses.

Based on the 2020 COVID-19 Survey data, Sourcewise identified service gaps and offered funding opportunities through the Coronavirus Aid, Relief, and Economic Security (CARES) Act.

Between September 2020 and September 2021, Sourcewise awarded \$2,044,033 to qualified senior and caregiver service providers to provide an array of Older American Act (OAA) Title III and Title VII services to respond to the identified needs.

In November 2021, in an effort to stay aware of the evolving needs of older adults, adults with disabilities, and caregivers in Santa Clara County, Sourcewise conducted a second COVID-19 Impact Survey.

The 2021 COVID-19 Impact Survey received 2,592 responses which is a 66% increase from 2020.

Purpose

Adults 60 and older age group and residents of long-term care facilities continue to be a high-risk population affected directly and indirectly by COVID-19. As we [Sourcewise and partners] continue to navigate the evolving needs of older adults and caregivers in Santa Clara County, it is imperative to continuously solicit for and receive input from our community members to ensure service accessibility to meet the needs of older adults and caregivers impacted by COVID-19.

In November 2021, Sourcewise worked with twenty-nine (29) local community-based agencies, health care providers, and county entities to understand and identify the current needs of older adults, adults with disabilities and caregivers in Santa Clara County. The survey focused on four areas:

1. Access to services/resources
2. Social Isolation & loneliness
3. Digital Divide & Inclusion
4. Informal Caregiver Support

Sourcewise goals for the 2021 COVID-19 Impact Survey are:

1. Capture the diverse and evolving needs of Santa Clara County older adult 60 and older, adults with disabilities (18 and older) and unpaid family caregiver (including paid In-Home Supportive Service care providers) population.
2. Influence collaborative and cooperative service delivery to avoid duplication of services.
3. Develop, improve, and advocate for the improvement of health and social services and their respective delivery systems in order to meet identified needs of older adults and caregivers.
4. Measure key areas known to be exacerbated due to COVID-19 including access to services, social isolation and loneliness, digital divide and connectivity, and caregiver support.
5. Identify Older American Act service delivery recommendations and coordinate with local service providers to administer services in the community.

Methods

The 2021 COVID-19 Survey was developed and administered online, in print and telephonically. The Survey Monkey online application allowed Sourcewise to track the number of responses live; administer unique links per each agency and analyze data using comparison charts and crosstabulation.

The 2021 COVID-19 Survey included 18 – 21 questions. Questions were reviewed and updated from the 2020 COVID-19 Shelter in Place Impact Survey to remain relevant in identifying potential unmet needs during the pandemic in Fall/Winter 21'. New questions were added to the 2021 COVID-19 Survey that focused on satisfaction of social connectedness and interactions; technology access and internet accessibility; and vaccination status.

Survey respondents were not required to answer every question in order to successfully submit the survey. Some respondents answered fewer questions than others based on their comfortability with sharing personal experience and/or information.

The 2021 COVID-19 Survey was available in four languages: **English, Spanish, Vietnamese, and Chinese (Simplified)**. The below breakdown identifies the number of surveys completed in the four different languages*.

- English: 2,076
- Spanish: 101
- Vietnamese: 170
- Chinese: 245

**Totals may not be accurate due to variations data entry of paper survey responses electronically*

The 2021 COVID-19 Survey was accessible online starting on **November 02, 2021** and was closed on **December 06, 2021**. Paper survey responses received by mail or pick-up were recorded with the preliminary data through **December 19, 2021**. All paper surveys completed in their entirety or partially were recorded to capture the variety of responses received from the community.

Sourcewise worked with eleven (11) agencies to provide paper copies of the 2021 COVID-19 Survey for distribution, coupled with paid return postage to the Sourcewise Santa Clara office. Seven (7) out of the eleven (11) agencies paper surveys were a unique color to easily identify and record responses based on the partner agency. Sourcewise used colored stickers for the remaining four (4) agencies to identify the agency and record responses.

Additional methods to capture responses included:

1. Zoom polling during scheduled programs at select locations
2. Email marketing and survey URL distribution
3. Printed flyer distribution including QR code and survey links in 4 languages to senior meal sites
4. Phone survey
5. Social Media content and email marketing templates

Of the twenty-nine (29) agencies that partnered with Sourcewise to disseminate the survey amongst their clientele and communities:

- 13 / 30 collectors capture 10 or less responses
- 9 / 30 collectors captured 11 - 50 responses
- 7/ 30 collectors captured between 50 - 200 individuals
- 1/ 30 collectors captured 201+ responses

Conclusion

Sourcewise received 2,592 responses to the 2021 COVID-19 Impact Survey. Responses identify gaps in access to services, reliable transportation, and programming while also amplifying known challenges because of COVID-19. This includes access to reliable and working technology devices and connectivity; exacerbated levels of social isolation continuing to rise amongst the caregiver and older adult population, and increased stress of unpaid and paid caregivers. Sourcewise aims to foster community partnerships with fellow senior and caregiver service providers serving Santa Clara County and target emergent needs of communities impacted by the effects of COVID-19.

To accomplish this, Sourcewise will work closely with our network of grantees to identify solutions to ensure accessibility to Older American Act Title III and Title VII services. Additionally, Sourcewise expects to administer a formal Request for Proposal to provide funding support to eligible organizations to administer emergency response programming and disaster relief services targeting older adults 60 and older, including unpaid family caregivers 18 years and older of the greatest social and economic need through Older American Act Title III and Title VII services in Santa Clara County.

Executive Summary

Sourcewise received 2,592 responses to the 2021 COVID-19 Impact Survey. The survey focused on 4 areas: (1) Access to services/resources (2) social isolation & loneliness, (3) digital divide and connectivity, and (4) caregiver support.

About 90% of all survey respondents are fully vaccinated. [View Table 2.9.](#)

The most reported challenges experienced by survey respondents include getting food, medicine or other essential items, income loss, and isolation from friends/family. [View Table 2.1.](#) Almost 24% of survey respondents identified challenges with access to reliable transportation to shop, purchase groceries or food items, and religious/spiritual services. [View Table 2.2.](#) Survey respondents 75 years and older found it most difficult to access household chores; groceries and food items, and/or daily meals. [View Table 2.6.](#)

20% of survey respondents are neither satisfied nor unsatisfied with their daily social connectedness and interactions. [View Table 3.3.](#) More than 50% of survey respondents identified that isolation from friends, family and loved ones continues to be a challenge experienced by adults and caregivers with older adults between the ages of 70 – 74 experiencing the highest rate of isolation. [View Table 3.1.1.](#)

More than 93% of survey respondents have access to some type of technology device. More than 81% of survey participants have access to a smartphone. However, 200 survey respondents identified not having access to a reliable and working technology device. [View Table 4.1.](#) More than 326 survey respondents do not have access to the internet in their homes and access wi-fi/connectivity from locations such as a coffee shop, community center, or library. [View Table 4.3.](#) Of the 200 individuals who do not have access to a reliable and working technology device, the top 2 reasons are (1) cannot afford it and (2) do not know how to use it. [View Table 4.2.](#)

About 50% of the total survey respondents identified as either a paid or unpaid caregiver. [View Table 5.1.](#) Caregivers generally reported higher levels of isolation than non-caregiver survey respondents at any age. [View Table 5.4.](#) Unpaid caregivers were least satisfied with their daily social interactions and unpaid caregivers reported experiencing higher levels of stress compared to paid caregivers. [View Table 5.3 & 5.3.1.](#) Paid and unpaid caregiver's identified needs ranging from moderate (31%) too high (61%) in every category including training, in-home care, respite, and caregiver supportive services. [View Table 5.6.](#) Unpaid caregiver support needs were higher than paid caregivers in 6 out of 7 need categories. [View Table 5.7.](#)

View the raw survey data after the summary here.

Section 1: Demographics

In line with Older American Act Title III and Title VII services, the 2021 COVID-19 Survey included a standard measurement of demographic questions to assist with identifying the greatest economic and social needs amongst older adults, unpaid/paid caregivers and adults with disabilities.

The demographic information will assist Sourcewise, and local service providers understand access to services or needs correlated with age, location, income, ethnicity, sexual orientation, and gender identity to develop targeted approaches to respond to the needs identified. All demographic information requested, minus a person's age and zip code asked in the 2021 COVID-19 Survey was voluntary and not required for an individual to participate in the survey.

The 2021 COVID-19 Survey collected 2,592 individual responses from 59 zip codes in Santa Clara County. View Figure 1.1 Respondents by Zip Code to view the number of participants responding from each zip code. **The top five (5) zip codes include: 95112, 95008, 95123, 95035, and 95121.**

Figure 1.1 Respondents by Zip Code¹

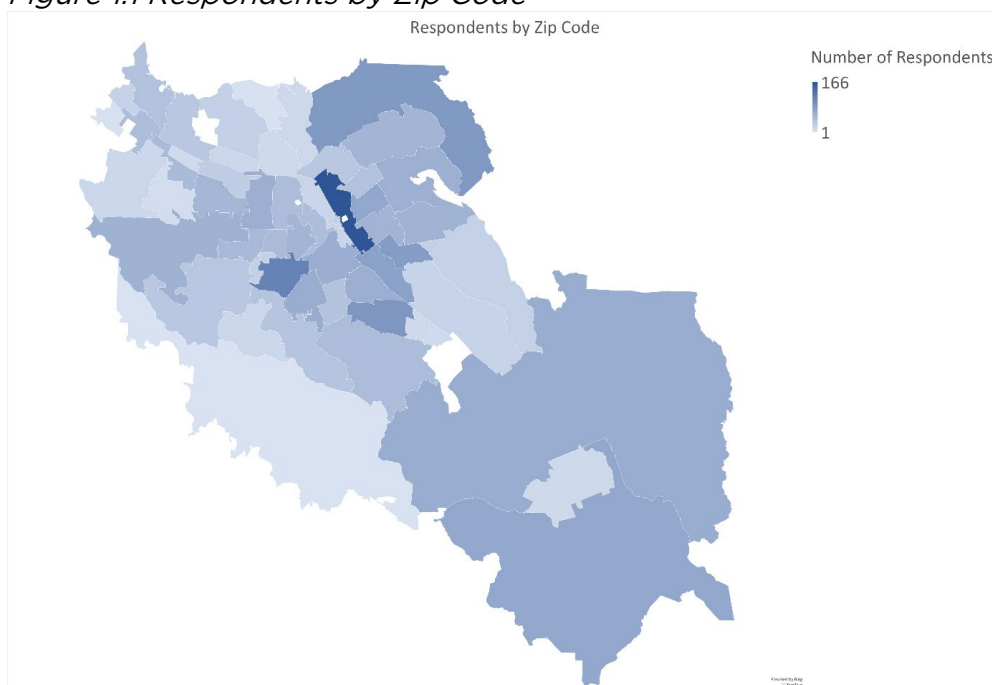


Table 1.1 Respondents by Zip Code²

Zip Code	N	Zip Code	N	Zip Code	N	Zip Code	N
95112	169	95122	57	95032	39	95134	14
95008	115	95148	57	94043	33	95046	14
95123	89	95128	55	95070	33	95054	13
95035	87	95132	54	95131	33	95119	13
95121	83	94087	54	94086	26	94041	12
95111	82	95129	50	95113	25	95139	12
95116	70	94040	48	94089	23	94024	8
95020	71	95126	48	95135	23	94305	3
95037	66	95117	47	95130	22	95002	3
95124	66	95050	46	94301	21	95033	2
95125	65	95120	45	95138	20	95161	2
95136	62	94306	44	95110	18	95015	2

¹ 2021 COVID-19 Impact Survey, #2

² 2021 COVID-19 Impact Survey, #2

95051	61	94303	39	94022	15	95115	1
95127	60	95133	39	94085	15	95158	1
95014	59	95118	38	95030	16		

At a glance, Table 1.2 Respondents by Age shows the highest number of 2021 COVID-19 Survey responses came from the 18 – 59 (27.31%) age group. However, when looking closer at the survey respondent data, the 60 – 74 age groups cumulative total represents 46% of all responses. See Table 1.2.1 Respondents by Age Groups.

Table 1.2 Respondents by Age³

Age Group	No. of Respondents	Percent
18-59	688	26.89%
60-64	457	17.86%
65-69	399	15.59%
70-74	329	12.86%
75-79	293	11.45%
80-84	181	7.07%
85+	212	8.28%

Table 1.2.1 Respondents by Age Groups⁴

Age Group	No. of Respondents	Percent
18-59	686	27.31%
60-74	1167	46.46%
75+	659	26.80%

In terms of ethnicity, the majority of survey respondents identified as White (33.65%) followed by Chinese (16.63%), Vietnamese (15.03%), Hispanic/Latino/a (13.43%) and Japanese (5.58%). Survey respondents had the ability to select multiple ethnicities when completing the online or paper survey thus the totals of Table 1.3 Respondents by Ethnicity does not equal 100%.

Table 1.3 Respondents by Ethnicity⁵

Ethnicity	Frequency	Percent*
American Indian/Alaska Native	27	1.05%
Asian Indian	82	3.20%
Black	82	3.20%
Cambodian	11	0.43%
Chinese	426	16.63%
Filipino	95	3.71%
Guamanian	2	0.08%
Hawaiian	7	0.27%
Hispanic or Latino	344	13.43%
Japanese	142	5.58%
Korean	31	1.21%
Laotian	1	0.04%
Samoan	2	0.08%
Other Pacific Islander	9	0.35%
Vietnamese	385	15.03%

³ 2021 COVID-19 Impact Survey, #1

⁴ 2021 COVID-19 Impact Survey, #1

⁵ 2021 COVID-19 Impact Survey, #3

White		862	33.65%
Other		99	3.86%
Decline to State		93	3.65%

*Note that respondents can select multiple races, the overall percentages therefore add up to more than 100%.

Individuals who participated in the 2021 COVID-19 Survey were asked to identify whether they had a disability including but not limited to physical, developmental, behavioral, emotional, cognitive, and/or sensory impaired. Of the total respondents 634 individuals (25.43%) reported having some type of *disability*. View Table 1.4 Disability by Age Group.

Table 1.4 Disability by Age Group⁶

Age Group	No Disability	Disability	Total
18-59	540 (80.00%)	137 (20.24%)	677
60-64	369 (81.28%)	85 (18.72%)	454
65-69	308 (78.17%)	86 (21.83%)	394
70-74	240 (76.19%)	75 (23.81%)	315
75-79	1814(67.67%)	92 (33.33%)	276
80-84	109 (65.66%)	57 (34.34%)	166
85+	98 (50.52%)	96 (49.48%)	194
Total	1,848 (74.64%)	628 (25.36%)	2,476

Additionally, the 2021 COVID-19 Survey asked respondents to identify a monthly household income range, after taxes. Although access to Older American Act services is not limited to income eligibility guidelines for those 60 and older and unpaid family caregivers, the survey responses assist with identifying additional support which Sourcewise or other service providers should consider while helping the individual. Of those survey respondents who did respond to the question, the highest number of responses regarding a person's monthly income was between \$900 - \$1,500 (437 survey respondents or 20.14%) and more than 424 individuals preferred not to share their monthly income after taxes.

Table 1.5 Respondent Income Range⁷

Monthly Income Range	N	Percent
(1) Under \$900	264	12.17%
(2) \$900-1500	437	20.14%
(3) \$1500-2500	343	15.81%
(4) \$2500-3500	203	9.35%
(5) \$3500-4000	134	6.18%
(6) Over \$4000	365	16.82%
Prefer not to respond	424	19.54%

⁶ 2021 COVID-19 Impact Survey, #4

⁷ 2021 COVID-19 Impact Survey, #11

Table 1.6 Respondents Gender and Table 1.7 Respondents Sexual Identity outline the sexual orientation and gender identity of survey respondents.

Like the 2020 COVID-19 survey administered, during the 2021 COVID-19 Survey Sourcewise and community partners received an overwhelming response from individuals who identify as females (67%) compared to their male counterparts (31%).

Table 1.6 Respondents Gender⁸

Gender	N	Percent
Male	639	30.87%
Female	1,379	66.62%
Genderqueer/Gender non-binary	4	0.19%
Transgender, female to male	1	0.05%
Decline to State	47	2.27%

Table 1.7 Respondents Sexual Identity⁹

Sexuality	N	Percent
Straight/Heterosexual	1,669	82.62%
Bisexual	34	1.68%
Gay/Lesbian/Same-Gender Loving	26	1.29%
Questioning/Unsure	11	0.54%
Prefer not to respond	280	13.86%

Section 2: Access to Services and Resources

The below data highlights 2021 COVID-19 Survey responses surrounding access to services and resources. Respondents were asked “In the past 3 months, what challenges have you experienced during the COVID-19 Pandemic?” The top three (3) challenges with respect to access to services and resources identified by respondents are outlined in Table 2.1 below.

Table 2.1 Number of People Experiencing Challenges in the last 3 months^{10}*

Challenge	People Experienced Impact	Percent
Income loss	639	29.05%
Illness or death of a friend or family member from COVID-19	637	29.07%
Getting supportive services like in-home care, adult day care/health centers, and senior centers	599	27.30%
Loss of residency or home	73	3.40%
Getting food, medicine and other essential items	705	32.22%
Issues with residential facilities like nursing homes	130	6.07%
Isolation from friends, family, or social network*	1,266	55.24%

* Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%.

⁸ 2021 COVID-19 Impact Survey, #16

⁹ 2021 COVID-19 Impact Survey, #17

¹⁰ 2021 COVID-19 Impact Survey, #5

Based on the total number of survey responses outlined in Table 2.2 Effects of Limited Transportation due to COVID-19, respondents identified challenges with being able to shop (23.44%); access groceries and food items (21.25%) and/or attend religious/spiritual services (22.17%).

Table 2.2 Effects of Limited Transportation due to COVID-19 ¹¹

Limited Access To:	N	Percent
Groceries and food items	444	21.25%
Daily meals	327	16.05%
Medication	290	14.24%
Shopping	481	23.44%
Medical Care	408	19.96%
Religious/Spiritual Services	437	22.17%
Other	43	1.57%

* Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%

Outlined in Table 2.3 Mean Effect of Limited Transportation due to COVID-19 by Zip Code, survey respondents who reside in zip codes 95113, 95033, 95139, 95117, 95138 experienced the most challenges with respect to accessing services due to lack of transportation listed in Table 2.2.

Table 2.4 Mean Effect of Limited Transportation due to COVID-19 by Age Group showcases on average the 18 – 59 age group experiences less challenges with accessing transportation because of COVID-19 compared to individuals 60 years and older (except for the 80-84 age group). However, these differences are relatively small, and most people on average experienced limited access to about 1 of the services/needs listed in Table 2.2.

Table 2.3 Mean Effect of Limited Transportation due to COVID-19 by Zip Code¹²

Zip Code	Mean	Zip Code	Mean
95113	4.11	95148	0.85
95033	4.00	95030	0.83
95139	2.86	95123	0.82
95117	2.37	95046	0.78
95138	2.25	95128	0.77
95130	1.82	95037	0.70
95112	1.74	94087	0.69
94041	1.70	94306	0.67
95131	1.68	95020	0.61
95050	1.51	95135	0.61
94040	1.48	95120	0.61
94085	1.31	95070	0.59
95132	1.27	94024	0.57
95111	1.27	95125	0.57
95122	1.21	95008	0.55

Table 2.4 Mean Effect of Limited Transportation due to COVID-19 by Age Group¹³

Age Group	Mean Limited Access Items
18-59	0.94
60-64	0.88
65-69	1.17
70-74	1.19
75-79	1.19
80-84	0.88
85+	1.20
All Ages	1.05

¹¹ 2021 COVID-19 Impact Survey, #14

¹² 2021 COVID-19 Impact Survey, #14

¹³ 2021 COVID-19 Impact Survey, #14

95136	1.14	95129	0.55
95035	1.07	95119	0.55
95121	1.07	94022	0.54
94303	1.07	95110	0.54
95014	1.07	95127	0.49
95116	1.04	94086	0.43
95133	1.04	95032	0.37
94043	1.00	94301	0.32
95115	1.00	94089	0.31
95051	0.98	95118	0.24
95126	0.92	94305	0.00
95124	0.86	95002	0.00
95054	0.86	95158	0.00
95134	0.85		

(Higher mean = more limited access to the items from Table 2.2)

In last 3 months, survey respondents identified services which they had either found very difficult or somewhat difficult to access. The top 5 services which had the highest number of responses included:

1. Recreation or physical activities (n=1,059)
2. Health services / health care (n=777)
3. Household chores (n=648)
4. Groceries and food items (n=577)
5. Daily meals (n=501)

Table 2.5 Difficulty Accessing Services in the past 3 months¹⁴

Service	Somewhat Difficult	Very Difficult	Combined Total
Recreational or Physical activities	711 (35.84%)	348 (17.54%)	1,059 (53.38%)
Health services/health care	637 (33.21%)	140 (7.30%)	777 (40.51%)
Help with health insurance	329 (17.26%)	108 (5.67%)	437 (22.93%)
Legal Services	207 (10.82%)	106 (5.54%)	313 (16.36%)
Fraud & financial abuse advocacy	125 (6.58%)	64 (3.37%)	189 (9.95%)
Help paying rent	231 (12.09%)	136 (7.12%)	367 (19.21%)
Reporting Abuse	70 (3.68%)	34 (1.79%)	104 (5.47%)
Financial assistance	286 (14.87%)	123 (6.40%)	422 (21.27%)
Home modification	253 (12.19%)	136 (7.12%)	389 (19.31%)
Applying for government benefits (CalFresh or Med-Cal)	255 (13.18%)	95 (4.95%)	350 (18.13%)
Case management (social worker; or help to coordinate access to services)	273 (14.22%)	119 (6.20%)	392 (20.42%)
Help finding employment	155 (8.14%)	91 (4.78%)	246 (12.92%)
Household chores	461 (24%)	187 (9.73%)	648 (33.73%)
Daily meals	374 (19.58%)	127 (6.65%)	501 (26.23%)
Groceries and food items	443(23.28%)	134(7.04%)	577 (30.32%)

* Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%

¹⁴ 2021 COVID-19 Impact Survey, #15

Survey respondents from a variety of age groups identified it to be very or somewhat difficult to access the top 5 services with those in the 74+ age range finding it to be very or somewhat challenging to access household chore services, groceries and food items and daily meals. Those survey respondents between the ages of 18 – 59 did not experience as much difficulty (very/somewhat) compared to those who were 60 and older. View Table 2.6 Difficulty (Both Somewhat and Very) Accessing Services by Age Group.

Table 2.6 Difficulty (Both Somewhat and Very) Accessing Services by Age Group¹⁵

Age Group	Recreation or Physical Activities	Health Services / Health Care	Household Chores	Groceries or food items	Daily Meals
18-59	258 (56.71%)	186 (41.24%)	132 (29.47%)	134 (30.05%)	104 (23.11%)
60-74	502 (51.92%)	377 (40.31%)	310 (33.54%)	265 (28.82 %)	229 (25.03%)
75+	295 (53.47%)	211 (39.65%)	204 (37.58%)	175 (33.07%)	165 (30.71%)

Through the 2021 COVID-19 Survey, participants 75 years and older identified either paying for care privately; in-home supportive services (IHSS) or a family member assisting them with daily tasks. Those survey respondents between the age of 60 – 74 were less likely to have someone to help them. View Table 2.7 and 2.7.1.

Table 2.7 Assistance with Daily Tasks¹⁶

Help with Tasks	N	Percent
No, I don't have someone who helps me	1,159	53.41%
Yes, I pay for care through an agency	42	1.94%
Yes, my spouse or family member helps me	760	35.02%
Yes, through In-Home Supportive Services	209	9.63%

Breakdown of age range of survey respondents that did not have someone helping them.

60-74:	591
75+:	256
18-59:	306

Table 2.7.1 "Yes, My Spouse or Family Member Helps Me" by Age Group¹⁷

Age Group	N (%)
18-59	152 (30.65%)
60-74	370 (35.68%)
75+	233 (38.60%)

At the end of the paper and electronic survey, Sourcewise provided individuals the opportunity to receive information and referrals for services, if needed. Table 2.8 outlines the overall requests from survey respondents for information. Sourcewise Information & Awareness contacted each individual to provide the requested resources based on the respondents preferred contact method.

Table 2.8 Categories of Informational & Resources Requested from Survey Respondents¹⁸

Informational Need *	N	Percent
Meals or groceries	340	23.24%
COVID Vaccines or COVID Booster Shot	271	18.52%
Transportation	235	16.06%
Caregiver Support & Training	257	17.57%
None of the above	737	50.38%

*Note: respondents could select more than 1 option so total does not equal 100%

¹⁵ 2021 COVID-19 Impact Survey, #15

¹⁶ 2021 COVID-19 Impact Survey, #13

¹⁷ 2021 COVID-19 Impact Survey, #13

¹⁸ 2021 COVID-19 Impact Survey, #22

The 2021 COVID-19 Survey identified that more than 90% of the survey respondents were fully vaccinated.

Table 2.9 Vaccination Status¹⁹

Vaccination Status	N	Percent
Not vaccinated	61	1.91%
Partially vaccinated	105	4.77%
Fully vaccinated	1,993	90.55%
Decline to state	42	1.91%

Section 3. Social Isolation & Loneliness

The most commonly reported challenge was isolation from friends, family or social network, with 55.24% (n=1,266) of people reporting experiencing isolation.

*Table 3.1 Number of People Experiencing COVID-19 Challenges in the last 3 months^{**20}*

Challenge	People Experienced Impact	Percent
Income loss	639	29.05%
Illness or death of a friend or family member from COVID-19	637	29.07%
Getting supportive services like in-home care, adult day care/health centers, and senior centers	599	27.30%
Loss of residency or home	73	3.40%
Getting food, medicine and other essential items	705	32.22%
Issues with residential facilities like nursing homes	130	6.07%
Isolation from friends, family, or social network*	1,266	55.24%

** Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%.

Table 3.1.2 Experienced Isolation by Age Group

Age Group	Percent Reporting Isolation
18-59	57.99%
60-64	56.10%
65-69	53.89%
70-74	59.67%
75-79	54.24%
80-84	47.77%
85+	48.66%



¹⁹ 2021 COVID-19 Impact Survey, #12

²⁰ 2021 COVID-19 Impact Survey, #5

The experience of isolation in the past 3 months is reported by a larger percentage of respondents between the ages of 70 – 74 (59.67%). (see Table 3.1.2).

Table 3.2 Negative Emotional Experiences in the Past 3 Months indicates that more than 50 – 60% of all survey respondents experience any of the negative emotional experiences sometimes or frequently. The top three (3) negative emotional experiences felt in the last three (3) months was less motivated to perform daily tasks (n=1,442); unable to sleep, restless (insomnia), or sleeping more than usual (n=1,346); and feeling emotional exhausted or overwhelmed (n=1,297).

*Table 3.2 Negative Emotional Experiences in the Past 3 Months*²¹*

Experience	Yes	Sometimes	Total
Less motivated to perform daily tasks	759 (35.77%)	683 (32.19%)	1,442 (67.96%)
Unable to sleep, restless (insomnia), or sleeping more than usual	779 (37.01%)	567 (26.94%)	1,346 (63.95%)
Changes in appetite (eating more or less than usual)	593 (28.44%)	465 (22.30%)	1,058 (50.74%)
Lonely or easily saddened	641 (30.38%)	566 (26.82%)	1,207 (57.20%)
More irritable	543 (26.41%)	536 (25.66%)	1,079 (52.07%)
Feeling emotionally exhausted or overwhelmed	678 (32.09%)	619 (29.29%)	1,297(61.38%)

*Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%.

The 2021 COVID-19 Survey included a slider scale to further understand respondents' satisfaction with their daily social interaction and connections. A scale of 1 = not satisfied and 10 = very satisfied was used. Of those who responded 898 (42.02%) selected 5 or less to describe their satisfaction and 1,214 (56.81%) used 6 or higher to describe their satisfaction with their daily social connectedness and interactions. The highest selected number on the scale was 5 which would determine that those 452 (21.15%) individuals are neither satisfied nor unsatisfied with their daily social interactions.

Table 3.3 Satisfaction with Social Connectedness and Interaction by Survey Participants (1 = not satisfied, 10 = very satisfied)²²

Satisfaction Level	N	Percent
0*	25	1.17%
1	94	4.40%
2	85	3.98%
3	128	5.99%
4	139	6.50%
5	452	21.15%
6	209	9.78%
7	305	14.27%
8	301	14.09%
9	137	6.41%
10	262	12.26%

*Did not respond to the survey question, recorded response is zero (0).

²¹ 2021 COVID-19 Impact Survey, #10

²² 2021 COVID-19 Impact Survey, #9

Section 4. Digital Divide and Inclusion

The 2021 COVID-19 Survey measured consistent and reliable access to technology devices, access to internet, locations which individuals may seek out to access internet, and if a person did not have access to a technology device what were the reasons. Based on the data collected more than 81% of individuals have a smartphone. View Table 4.1.

Table 4.1 Overall Access by Type of Technology²³

Technology	N	Percent
Smartphone	1,962	81.72%
Tablet	958	39.90%
Laptop Computer	994	41.40%
Desktop Computer	696	28.99%
Smart Speaker	432	17.99%
None	200	8.33

Of the 200 survey respondents that identified they did not have consistent access to a working technology device, the highest reported age category was individuals 85 years or older. View Table 4.1 & Table 4.1.1.

Table 4.1.1 Type of Technology Accessible by Age Group²⁴

Tech Type Age	Smart phone	iPad/Tablet	Laptop Computer	Desktop Computer	Smart Speaker (Amazon Alexa or Google Home Smart Speaker)	None	Total
60-64	373	161	194	139	69	22	427
65-69	312	168	157	100	65	20	378
70-74	254	140	141	98	76	24	315
75-79	218	121	113	84	62	28	284
80-84	119	67	51	57	25	29	172
85+	128	62	44	66	27	51	204
18 - 59	548	234	288	149	107	24	605
Total	1952	953	988	693	431	198	2385

*Note that respondents can select multiple answers, the overall percentages therefore add up to more than 100%.

The top reasons for not having access to a technology device or internet was because survey respondents did not know how to use it or could not afford it. View Table 4.2.

Table 4.2 Respondents with No Access to Technology Reasons²⁵

Reason	N	Percent
Don't want it	37	23.27%
Don't know how to use it	62	38.99%
Don't have anyone who can help me use it	35	22.01%
Fear of scams or privacy concerns	33	20.75%
Can't afford it	61	38.36%

²³ 2021 COVID-19 Impact Survey, #6

²⁴ 2021 COVID-19 Impact Survey, #6

²⁵ 2021 COVID-19 Impact Survey, #7

Table 4.2.1 Reasons for Not Having Technology by Age Group

Age Group	Don't Want It	Don't Know How to Use	Don't Have Anyone to Help	Fear of Scams / Privacy	Can't Afford it
18-59	5	3	2	2	12
60-74	13	16	11	14	19
75+	18	42	22	17	30
TOTAL	36	61	35	33	61

More than 326 (15.1%) of survey respondents identified that they either do not have access to the internet at home or access free wi-fi at a location like coffee shop, community center or library. View Table 4.3.

Table 4.3 How do Survey Respondents Access to the Internet²⁶

Access Selection*	N	Percent
I pay for a broadband internet connection (like through Comcast/Xfinity or AT&T)	1,696	78.59%
Through my smartphone/mobile data plan	932	43.19%
Location with free wi-fi like coffee shop, community center or library	182	8.43%
I do not have access to the internet at home	144	6.67%

*Note: respondents could select more than 1 option so total does not equal 100%

Section 5. Caregiver Support

The 2021 COVID-19 Survey solicited to understand the diverse and evolving needs of paid and unpaid caregivers in Santa Clara County. Questions within the survey aimed to understand the stress-level of caregivers and needs relevant to accessing supportive programming and services in Santa Clara County specifically for caregivers.

Almost 50% of all survey respondents identified as a paid or unpaid caregiver. View Table 5.1. Nearly 75% of all unpaid caregivers who responded were 70 years and older. View Table 5.2.

Table 5.1 Caregiver Status²⁷

Caregiver Status	N	Percent
Not a caregiver	959	51.23%
Unpaid caregiver	286	15.28%
Paid caregiver	627	33.49%

Table 5.2 Caregiver Status by Age Group²⁸

Age	Not a caregiver	Unpaid caregiver	Paid caregiver
18-59	120 (26.85%)	61 (13.65%)	266 (59.51%)
60-64	133 (39.12%)	46 (13.53%)	161 (47.35%)
65-69	155 (49.84%)	46 (14.79%)	110 (35.37%)
70-74	177 (67.82%)	41 (15.71%)	43 (16.48%)
75-79	164 (73.87%)	34 (15.32%)	24 (10.81%)
80-84	102 (77.27%)	18 (13.64%)	12 (9.09%)
85+	99 (68.28%)	39 (26.90%)	7 (4.83%)

²⁶ 2021 COVID-19 Impact Survey, #8

²⁷ 2021 COVID-19 Impact Survey, #19

²⁸ 2021 COVID-19 Impact Survey, #19

As shown in Table 5.3 Caregivers Stress Level, the highest selected number describing both caregivers who are paid and unpaid stress level was 7 (n=149).

Table 5.3 Caregivers Stress Level (1 = no stress, 10 = very high stress)²⁹*

Stress Level	N	Percent
0**	31	3.63%
1	50	5.85%
2	39	4.57%
3	46	5.39%
4	33	3.86%
5	147	17.21%
6	58	6.79%
7	149	17.45%
8	132	15.46%
9	69	8.08%
10	100	11.71%

*Includes paid and not paid caregivers *

**Did not respond to the survey question, recorded response is zero (0).

Table 5.3.1 Unpaid Caregiver Stress Level shows the highest selected number describing caregivers stress level was respectively **7 (n=46)**.

Table 5.3.1 Unpaid Caregiver Stress Level (1 = no stress, 10 = very high stress)³⁰

Stress Level	N	Percent
0*	3	1.17%
1	10	3.89%
2	6	2.33%
3	14	5.45%
4	3	1.17%
5	44	17.12%
6	20	7.78%
7	46	17.90%
8	39	15.18%
9	33	12.84%
10	39	15.18%

*Did not respond to the survey question, recorded response is zero (0).

²⁹ 2021 COVID-19 Impact Survey, #20

³⁰ 2021 COVID-19 Impact Survey, #20

Unpaid caregivers reported **higher levels of isolation** in all three age groups. Paid caregivers reported the lowest levels of isolation in all three groups. See Table 5.4 for details.

Table 5.4 Experienced Isolation by Age Group and Caregiver Status³¹

Age Group	Caregiver Status	N	Percent
18-59	Not a caregiver	67	58.26%
	Unpaid caregiver	42	70.00%
	Paid Caregiver	150	58.14%
60-74	Not a caregiver	251	57.83%
	Unpaid caregiver	97	76.38%
	Paid Caregiver	149	48.85%
75+	Not a caregiver	177	54.13%
	Unpaid caregiver	48	60.00%
	Paid Caregiver	16	38.10%

Unpaid caregivers are the least satisfied with their daily social interaction (5.67/10) followed by non-caregivers (6.20/10) and paid caregivers (6.25/10). View Table 5.5.

Table 5.5 Average Satisfaction with Daily Social Interaction and Connection by Caregiver Status³²

Caregiver	Mean Satisfaction Score
Not a caregiver	6.20
Unpaid	5.67
Paid	6.25

Paid and unpaid caregiver's identified needs ranging from moderate (31%) too high (61%) in every category including training, in-home care, respite, and caregiver supportive services. View Table 5.6 Caregiver Support Needs. The top 4 support needs identified by caregivers (including paid and not paid). Which are:

1. Finding time for yourself (61.65%)
2. Balancing work and family responsibilities (51.06%)
3. Easy activities you can do with the person you care for (47.99%)
4. A short-term break from caregiving (47.72%)

Table 5.6 Caregiver Support Needs³³

Category of Help Needed*	N	Percent
Online education or classes on caregiving	255	30.14%
In-home care provider	309	36.57%
A short-term break from caregiving	408	47.72%
Easy activities you can do with the person you care for	406	47.99%
Balancing work and family responsibilities	433	51.06%
Finding time for yourself	532	61.65%
Access to Personal Protective Equipment (PPE) and supplies	274	32.46%

*Note: respondents could select more than 1 option so total does not equal 100%

³¹ 2021 COVID-19 Impact Survey, #5

³² 2021 COVID-19 Impact Survey, #9

³³ 2021 COVID-19 Impact Survey, #21

When breaking down the support needs a caregiver identified, unpaid caregivers responses are higher in 6 out of 7 categories of support needs. While paid caregivers responded most to **finding ways to balance work and family responsibilities**. View Table 5.7.

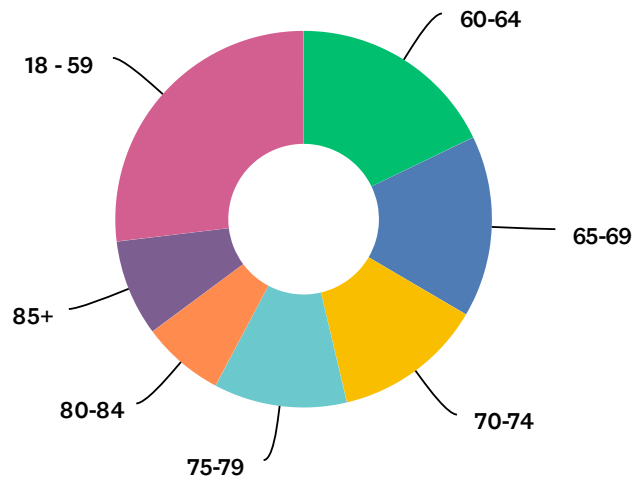
Table 5.7 Caregiver Top Support Needs by Age and Caregiver Status³⁴

Support Need	Caregiver Status	
	Unpaid	Paid
Online education or classes on caregiving	86 (34.86%)	166 (28.87%)
In-home care provider	128 (50.39%)	175 (30.86%)
A short-term break from caregiving	164 (64.06%)	242 (41.87%)
Finding time for yourself	171 (66.28%)	355 (61%)
Balancing work and family responsibilities	127 (51.21%)	300 (51.99%)
Easy activities you can do with the person you care for	123 (49%)	276 (48.71%)
Access to Personal Protective Equipment (PPE) and supplies	60 (24.29%)	203 (35.68%)

³⁴ 2021 COVID-19 Impact Survey, #21

Q1 Which of the following age categories best describe you?

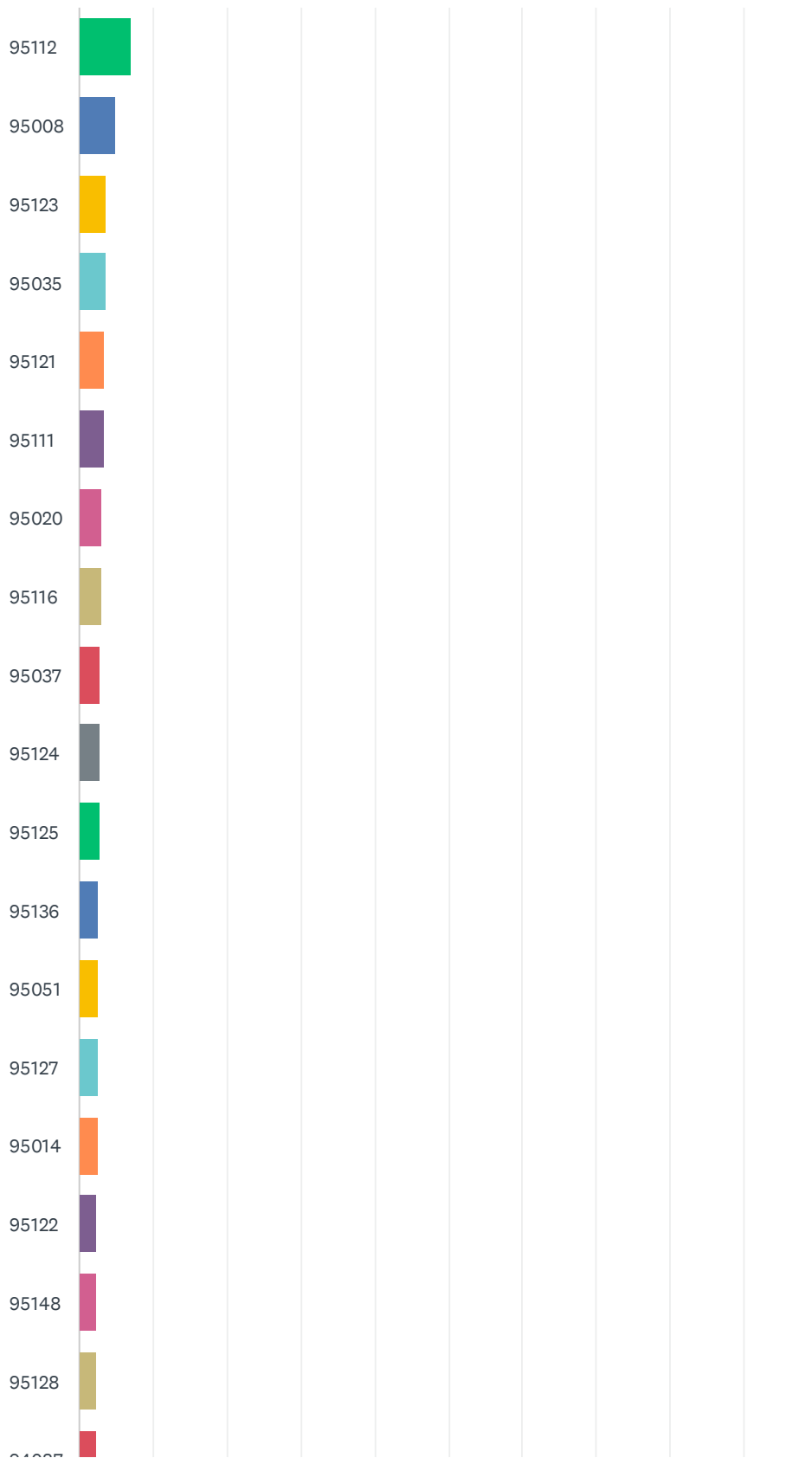
Answered: 2,559 Skipped: 33



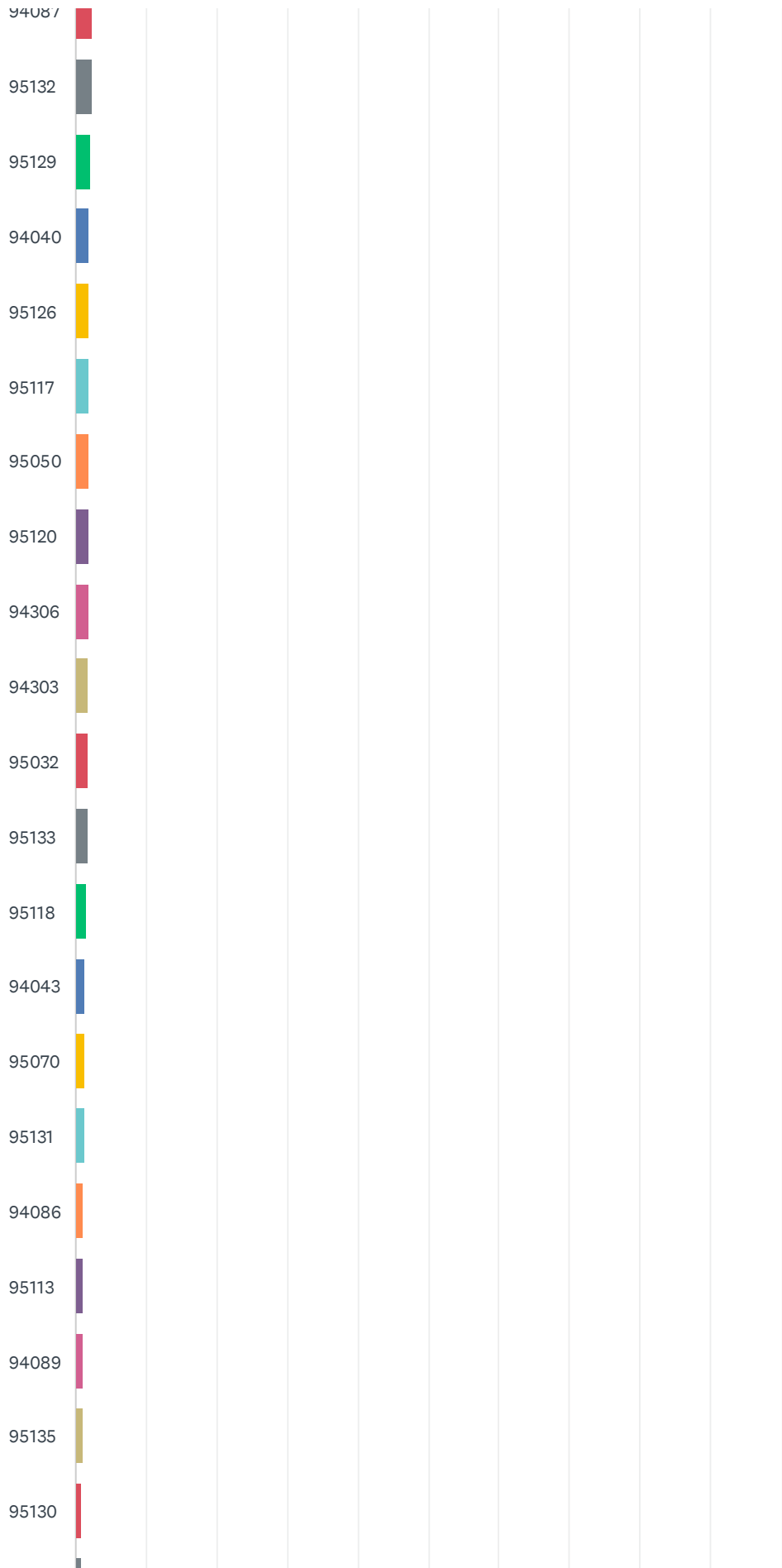
ANSWER CHOICES	RESPONSES	
60-64	17.86%	457
65-69	15.59%	399
70-74	12.86%	329
75-79	11.45%	293
80-84	7.07%	181
85+	8.28%	212
18 - 59	26.89%	688
TOTAL		2,559

Q2 What is your zip code?

Answered: 2,388 Skipped: 204



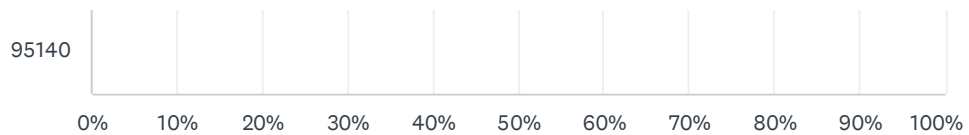
2021 Santa Clara County COVID-19 Impact Survey



2021 Santa Clara County COVID-19 Impact Survey



2021 Santa Clara County COVID-19 Impact Survey



2021 Santa Clara County COVID-19 Impact Survey

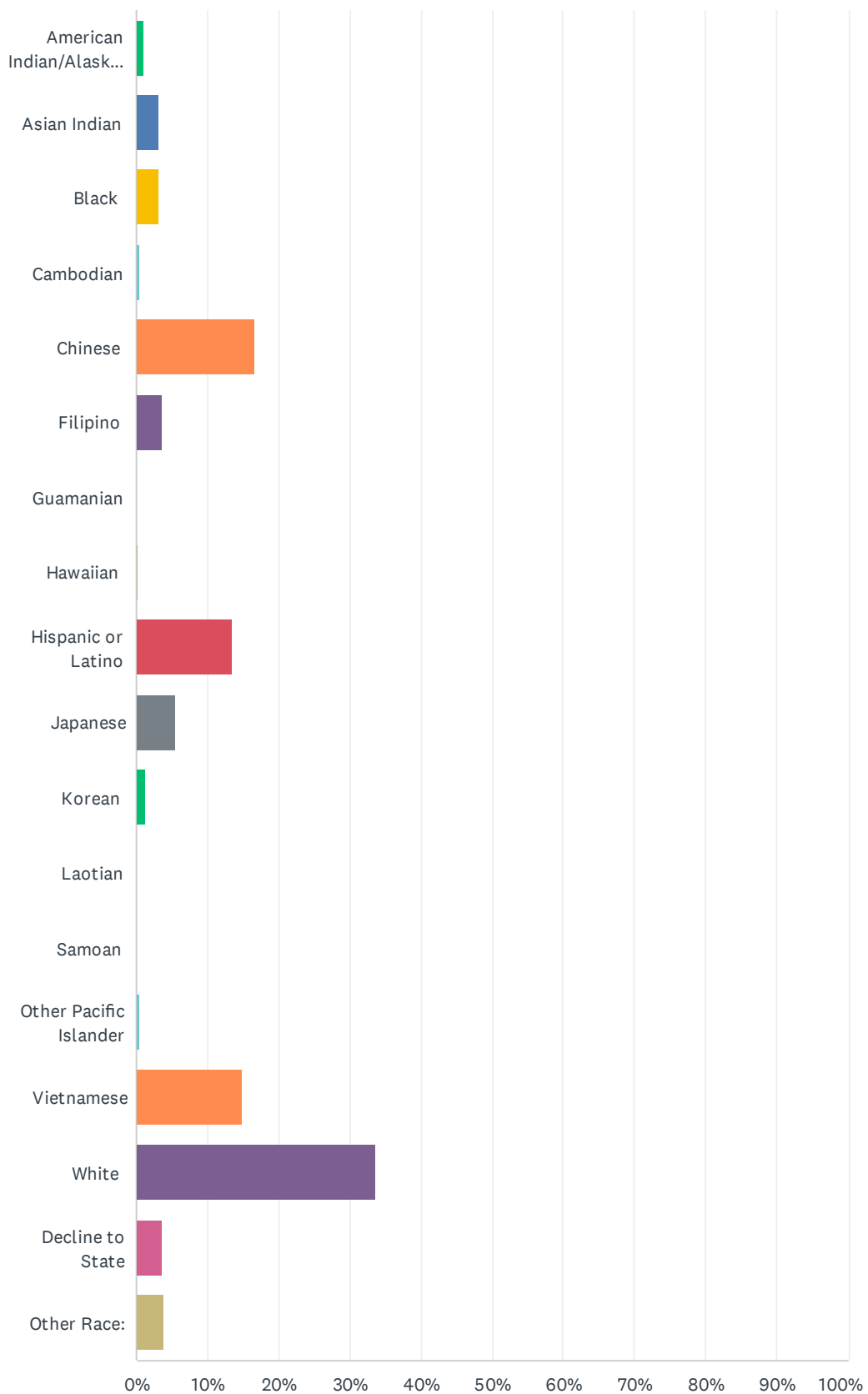
ANSWER CHOICES	RESPONSES	
95112	7.08%	169
95008	4.82%	115
95123	3.73%	89
95035	3.64%	87
95121	3.48%	83
95111	3.43%	82
95020	2.97%	71
95116	2.93%	70
95037	2.76%	66
95124	2.76%	66
95125	2.72%	65
95136	2.60%	62
95051	2.55%	61
95127	2.51%	60
95014	2.47%	59
95122	2.39%	57
95148	2.39%	57
95128	2.30%	55
94087	2.26%	54
95132	2.26%	54
95129	2.09%	50
94040	2.01%	48
95126	2.01%	48
95117	1.97%	47
95050	1.93%	46
95120	1.88%	45
94306	1.84%	44
94303	1.63%	39
95032	1.63%	39
95133	1.63%	39
95118	1.59%	38
94043	1.38%	33

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95070	1.38%	33
95131	1.38%	33
94086	1.09%	26
95113	1.05%	25
94089	0.96%	23
95135	0.96%	23
95130	0.92%	22
94301	0.88%	21
95138	0.84%	20
95110	0.75%	18
95030	0.67%	16
94022	0.63%	15
94085	0.63%	15
95046	0.59%	14
95134	0.59%	14
95054	0.54%	13
95119	0.54%	13
94041	0.50%	12
95139	0.50%	12
94024	0.34%	8
94305	0.13%	3
95002	0.13%	3
95015	0.08%	2
95033	0.08%	2
95161	0.08%	2
95115	0.04%	1
95158	0.04%	1
94304	0.00%	0
95140	0.00%	0
TOTAL		2,388

Q3 What is your ethnicity? Select all that apply.

Answered: 2,562 Skipped: 30



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ANSWER CHOICES	RESPONSES	
American Indian/Alaska Native	1.05%	27
Asian Indian	3.20%	82
Black	3.20%	82
Cambodian	0.43%	11
Chinese	16.63%	426
Filipino	3.71%	95
Guamanian	0.08%	2
Hawaiian	0.27%	7
Hispanic or Latino	13.43%	344
Japanese	5.54%	142
Korean	1.21%	31
Laotian	0.04%	1
Samoan	0.08%	2
Other Pacific Islander	0.35%	9
Vietnamese	15.03%	385
White	33.65%	862
Decline to State	3.71%	95
Other Race:	3.86%	99
Total Respondents: 2,562		

#	OTHER RACE:	DATE
1	persian	2/8/2022 9:49 PM
2	american	2/8/2022 9:45 PM
3	american	2/8/2022 9:40 PM
4	African American	12/18/2021 10:32 AM
5	European American	12/18/2021 10:32 AM
6	Assyrian Persian	12/13/2021 1:46 PM
7	Assyrian Persian	12/8/2021 1:26 PM
8	Okinawan-Japanese	12/7/2021 5:37 PM
9	Portuguese	12/7/2021 2:46 PM
10	Mexican	12/4/2021 10:31 PM
11	Assyrian	12/2/2021 12:34 PM
12	Myanmar	12/2/2021 6:34 AM
13	Taiwanese	12/1/2021 8:17 AM
14	Thai	12/1/2021 2:23 AM

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15	Hispano	11/30/2021 11:24 AM
16	Human	11/29/2021 7:43 PM
17	Việt	11/29/2021 5:00 PM
18	Assyrian Persian	11/29/2021 3:01 PM
19	Assyrian Persian	11/29/2021 2:08 PM
20	Assyrian,Iranian	11/29/2021 1:50 PM
21	Filipino	11/29/2021 1:42 PM
22	portuguese	11/29/2021 1:08 PM
23	Italian white	11/29/2021 10:21 AM
24	Mexican	11/29/2021 10:16 AM
25	95116 is my zip code	11/29/2021 10:06 AM
26	Do not wish to disclose.	11/29/2021 9:48 AM
27	American	11/29/2021 9:47 AM
28	unknown	11/29/2021 9:36 AM
29	Portuguese	11/29/2021 9:32 AM
30	Mexican american	11/29/2021 9:26 AM
31	Iranian	11/29/2021 9:20 AM
32	R. O. C. Republic of China	11/26/2021 7:56 PM
33	Jewish	11/23/2021 9:19 PM
34	unknown	11/23/2021 3:10 PM
35	Portuguese	11/22/2021 10:24 PM
36	Mexican	11/21/2021 6:42 AM
37	Taiwanese	11/20/2021 11:32 AM
38	Chinese American	11/19/2021 3:29 PM
39	Persian	11/18/2021 9:13 PM
40	Taiwanese	11/18/2021 8:15 PM
41	multi	11/18/2021 5:31 PM
42	95127	11/18/2021 3:47 PM
43	Caucasian	11/18/2021 2:56 PM
44	Indonesian	11/18/2021 11:34 AM
45	Middle eastern	11/18/2021 11:23 AM
46	Mexican American citizen	11/18/2021 11:14 AM
47	multicultral	11/18/2021 11:05 AM
48	mix of many	11/18/2021 10:49 AM
49	Taiwanese	11/18/2021 9:51 AM
50	Mexican American	11/14/2021 10:10 PM
51	台灣人	11/14/2021 8:00 AM
52	Not race but Jewish	11/13/2021 6:33 AM

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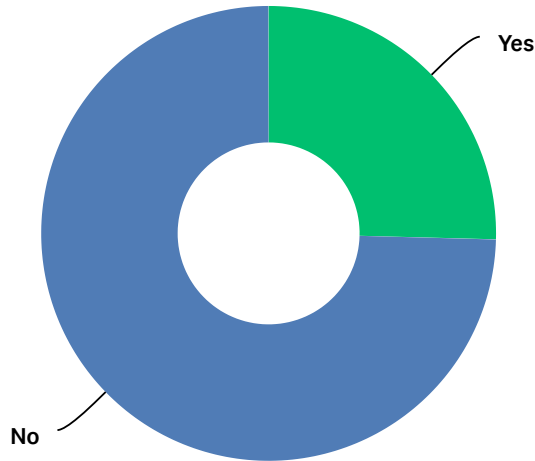
53	White	11/12/2021 2:23 PM
54	Persian	11/12/2021 10:28 AM
55	Mediterranean	11/8/2021 7:07 PM
56	Irish	11/8/2021 10:21 AM
57	Peruvian American	11/8/2021 9:51 AM
58	Taiwanese	11/8/2021 4:52 AM
59	Burmese/ chinese	11/7/2021 1:56 PM
60	French , Italian and Cherokee i dian	11/7/2021 8:28 AM
61	Hispanic	11/6/2021 7:05 PM
62	none of business	11/6/2021 3:58 PM
63	asian	11/6/2021 11:27 AM
64	Taiwanese	11/5/2021 8:09 PM
65	Persian (Iranian)	11/5/2021 4:13 PM
66	Taino	11/5/2021 2:49 PM
67	TAIWANESE	11/5/2021 1:43 PM
68	Ashkenazi	11/5/2021 12:53 PM
69	Human	11/5/2021 10:16 AM
70	Burmese Chinese	11/5/2021 10:03 AM
71	Sri Lanken	11/5/2021 7:28 AM
72	Taiwanese	11/4/2021 11:37 PM
73	Assyrian	11/4/2021 11:27 PM
74	Mexicano	11/4/2021 7:57 PM
75	Asian	11/4/2021 6:22 PM
76	Taiwanese	11/4/2021 6:15 PM
77	台灣人	11/4/2021 5:35 PM
78	Mexicano	11/4/2021 3:56 PM
79	Multiracial	11/4/2021 3:39 PM
80	Other	11/4/2021 3:36 PM
81	Chicana	11/4/2021 2:58 PM
82	human	11/4/2021 2:17 PM
83	Black African	11/4/2021 2:02 PM
84	Portuguesa	11/4/2021 1:41 PM
85	Africa American	11/4/2021 1:38 PM
86	Middle Eastern	11/4/2021 1:29 PM
87	Taiwanese	11/4/2021 1:11 PM
88	Taiwanese	11/4/2021 1:10 PM
89	Turkish	11/4/2021 1:09 PM
90	Other	11/4/2021 1:07 PM

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91	台灣人	11/4/2021 1:04 PM
92	Mexican	11/4/2021 1:02 PM
93	Puerto Rican	11/4/2021 12:58 PM
94	Persian	11/4/2021 12:56 PM
95	gentile	11/4/2021 12:55 PM
96	Portuguese	11/4/2021 12:55 PM
97	Persian	11/4/2021 12:54 PM
98	Caucasian	11/4/2021 9:47 AM
99	Caucasian	11/4/2021 9:45 AM

Q4 Are you a person with a disability (physical, developmental, behavioral or emotional, cognitive, and/or sensory impaired)?

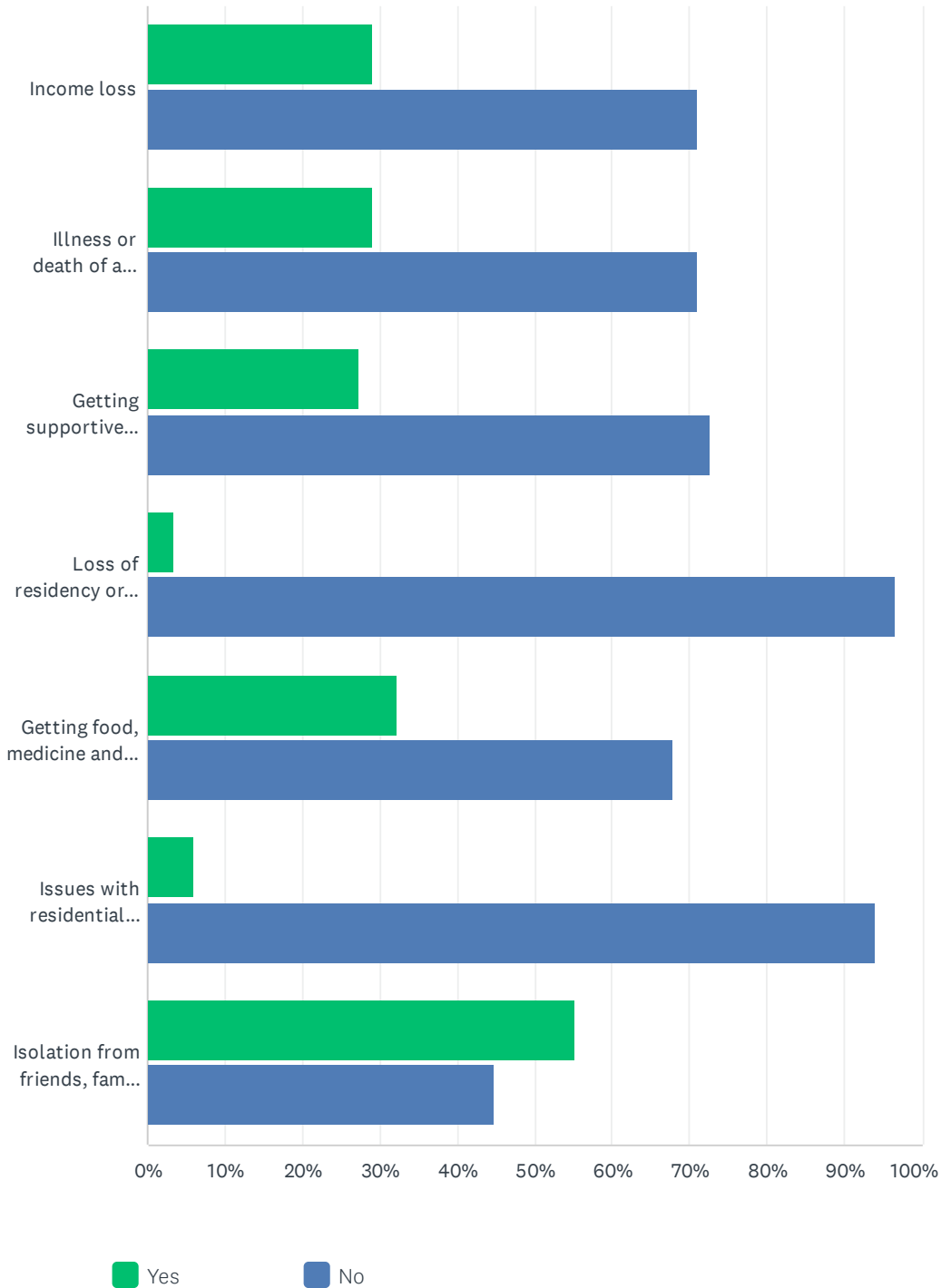
Answered: 2,493 Skipped: 99



ANSWER CHOICES	RESPONSES	
Yes	25.43%	634
No	74.57%	1,859
TOTAL		2,493

Q5 In the past 3 months, what challenges have you experienced during the COVID-19 Pandemic?

Answered: 2,384 Skipped: 208

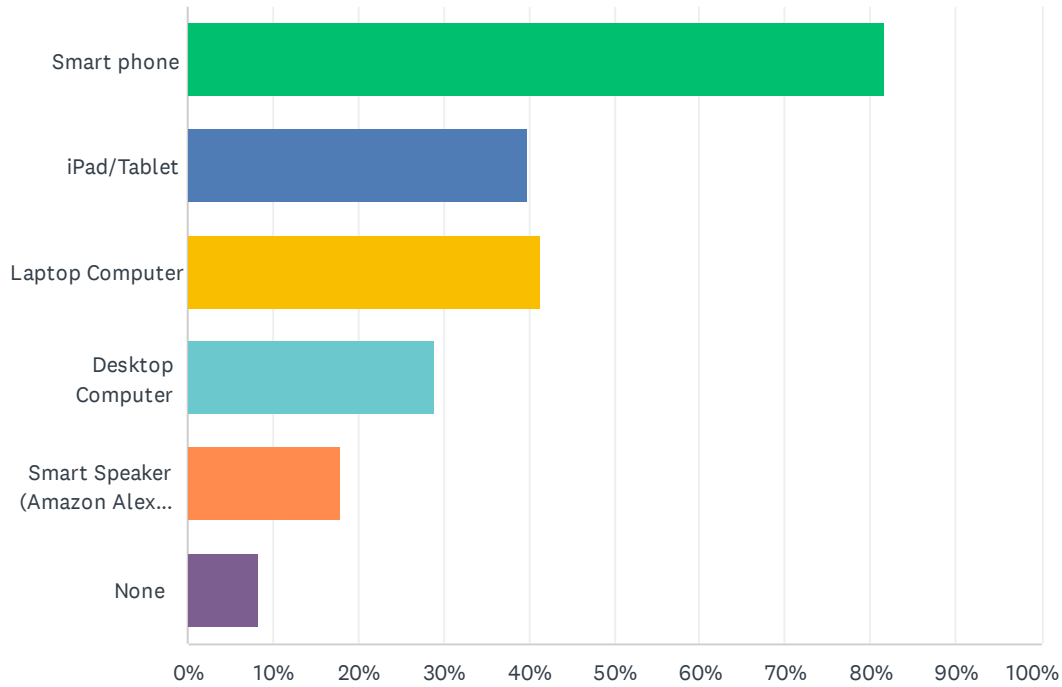


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	YES	NO	TOTAL
Income loss	29.05% 639	70.95% 1,561	2,200
Illness or death of a friend or family member from COVID-19	29.07% 637	70.93% 1,554	2,191
Getting supportive services like in-home care, adult day care/health centers, and senior centers	27.30% 599	72.70% 1,595	2,194
Loss of residency or home	3.40% 73	96.60% 2,072	2,145
Getting food, medicine and other essential items	32.22% 705	67.78% 1,483	2,188
Issues with residential facilities like nursing homes	6.07% 130	93.93% 2,012	2,142
Isolation from friends, family or social network	55.24% 1,266	44.76% 1,026	2,292

Q6 Do you have consistent and reliable access to any of the following forms of technology devices? Select all that apply.

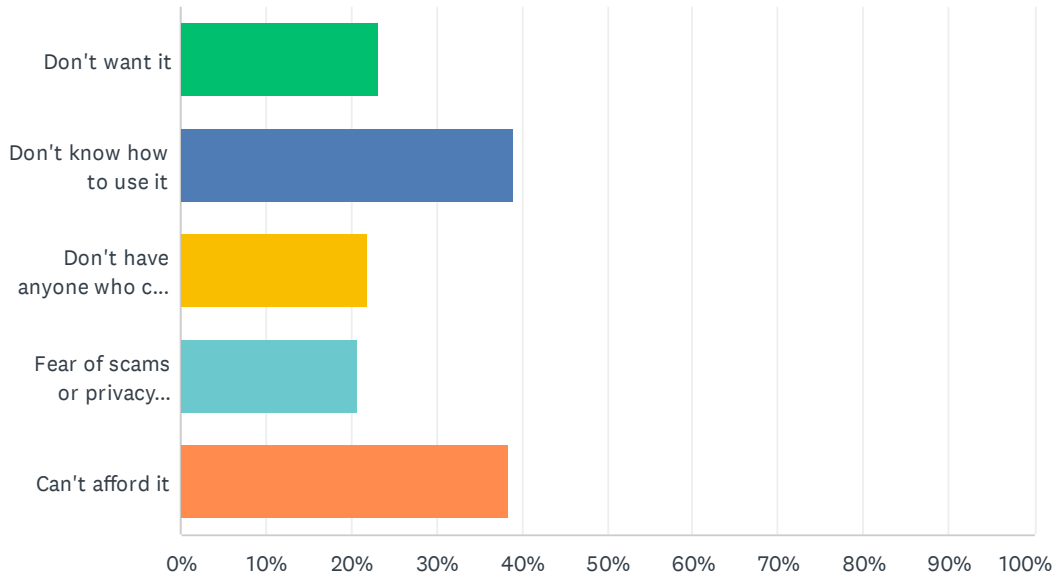
Answered: 2,401 Skipped: 191



ANSWER CHOICES	RESPONSES	
Smart phone	81.72%	1,962
iPad/Tablet	39.90%	958
Laptop Computer	41.40%	994
Desktop Computer	28.99%	696
Smart Speaker (Amazon Alexa or Google Home Smart Speaker)	17.99%	432
None	8.33%	200
Total Respondents: 2,401		

Q7 If you do not have access to technology devices or internet, what are the main reasons? Select all that apply.

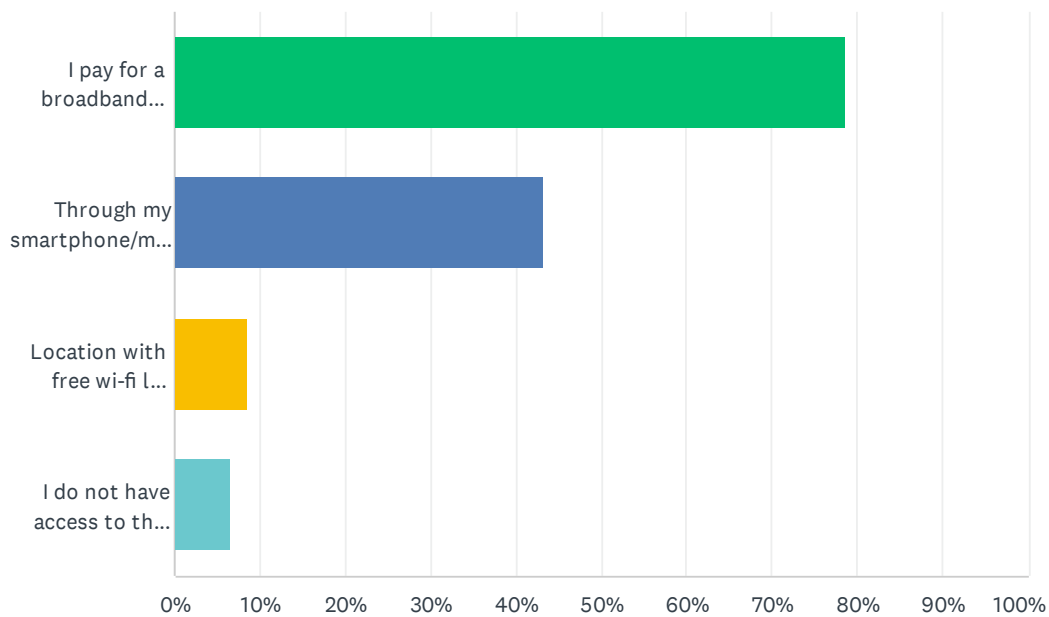
Answered: 159 Skipped: 2,433



ANSWER CHOICES	RESPONSES	
Don't want it	23.27%	37
Don't know how to use it	38.99%	62
Don't have anyone who can help me use it	22.01%	35
Fear of scams or privacy concerns	20.75%	33
Can't afford it	38.36%	61
Total Respondents: 159		

Q8 How do you access the Internet? Select all that apply.

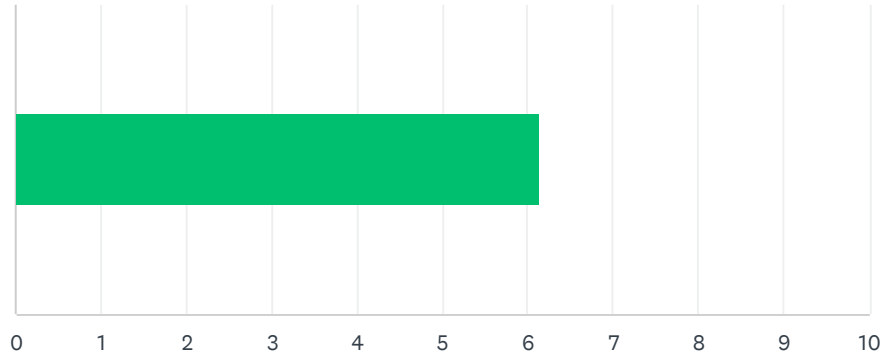
Answered: 2,158 Skipped: 434



ANSWER CHOICES	RESPONSES	
I pay for a broadband Internet connection (like through Comcast/Xfinity or AT&T)	78.59%	1,696
Through my smartphone/mobile data plan	43.19%	932
Location with free wi-fi like coffee shop, community center or library	8.43%	182
I do not have access to the Internet at home	6.67%	144
Total Respondents: 2,158		

Q9 How satisfied are you with your daily social interaction and connection? (1 = not satisfied, 10 = very satisfied)

Answered: 2,137 Skipped: 455



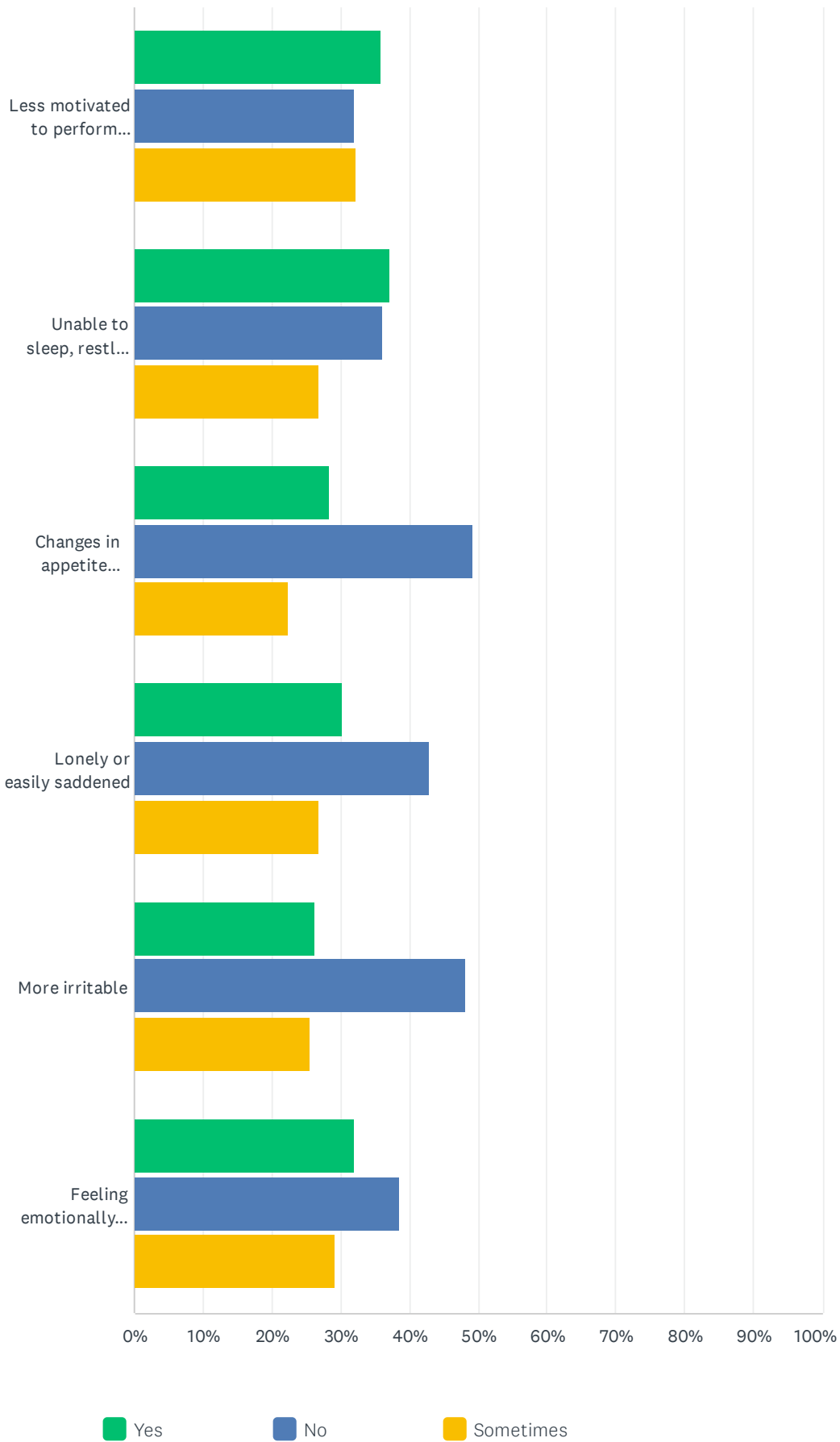
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	6	13,114	2,137
Total Respondents: 2,137			

#		DATE
1	4	2/10/2022 1:04 AM
2	1	2/10/2022 12:59 AM
3	1	2/10/2022 12:54 AM
4	3	2/10/2022 12:46 AM
5	7	2/10/2022 12:41 AM
6	2	2/10/2022 12:39 AM
7	4	2/10/2022 12:35 AM
8	10	2/10/2022 12:29 AM
9	4	2/10/2022 12:24 AM
10	6	2/10/2022 12:20 AM
11	8	2/10/2022 12:15 AM
12	10	2/10/2022 12:12 AM
13	2	2/10/2022 12:05 AM
14	8	2/8/2022 10:22 PM
15	6	2/8/2022 10:21 PM
16	2	2/8/2022 10:20 PM
17	1	2/8/2022 10:18 PM
18	10	2/8/2022 10:15 PM
19	3	2/8/2022 10:14 PM

Q10 In the past 3 months, have you experienced any of the following?
Select all that apply.

Answered: 2,194 Skipped: 398

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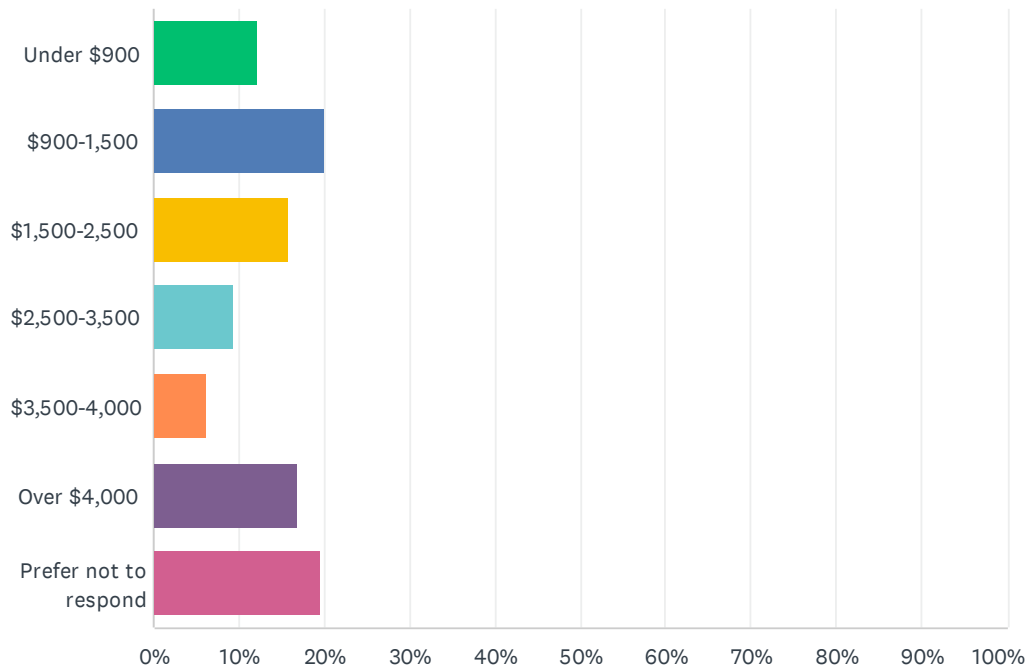


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	YES	NO	SOMETIMES	TOTAL
Less motivated to perform daily tasks	35.77% 759	32.05% 680	32.19% 683	2,122
Unable to sleep, restless (insomnia), or sleeping more than usual	37.01% 779	36.06% 759	26.94% 567	2,105
Changes in appetite (eating more or less than usual)	28.44% 593	49.26% 1,027	22.30% 465	2,085
Lonely or easily saddened	30.38% 641	42.80% 903	26.82% 566	2,110
More irritable	26.14% 546	48.20% 1,007	25.66% 536	2,089
Feeling emotionally exhausted or overwhelmed	32.09% 678	38.62% 816	29.29% 619	2,113

Q11 What is your monthly, after-tax, household income?

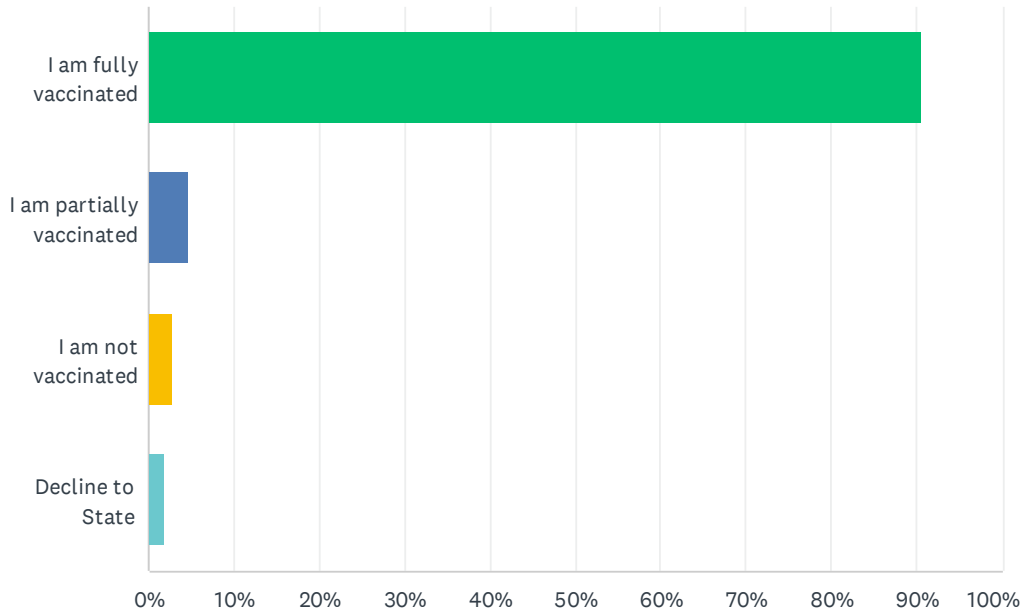
Answered: 2,170 Skipped: 422



ANSWER CHOICES	RESPONSES	
Under \$900	12.17%	264
\$900-1,500	20.14%	437
\$1,500-2,500	15.81%	343
\$2,500-3,500	9.35%	203
\$3,500-4,000	6.18%	134
Over \$4,000	16.82%	365
Prefer not to respond	19.54%	424
TOTAL		2,170

Q12 What is your COVID-19 vaccination status?

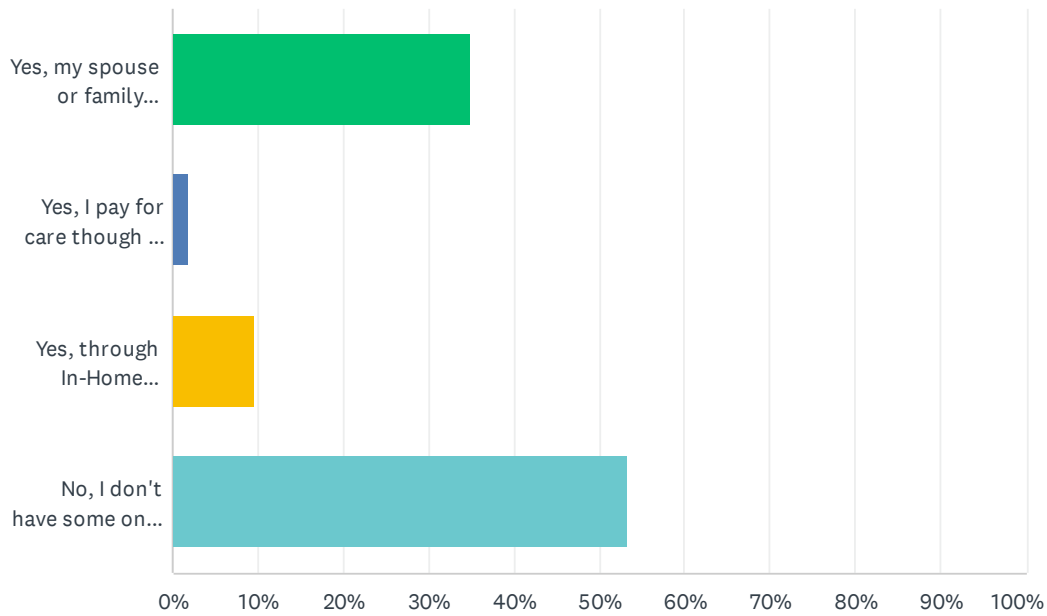
Answered: 2,201 Skipped: 391



ANSWER CHOICES	RESPONSES	
I am fully vaccinated	90.55%	1,993
I am partially vaccinated	4.77%	105
I am not vaccinated	2.77%	61
Decline to State	1.91%	42
TOTAL		2,201

Q13 Do you have someone, who assists you with daily tasks or errands?

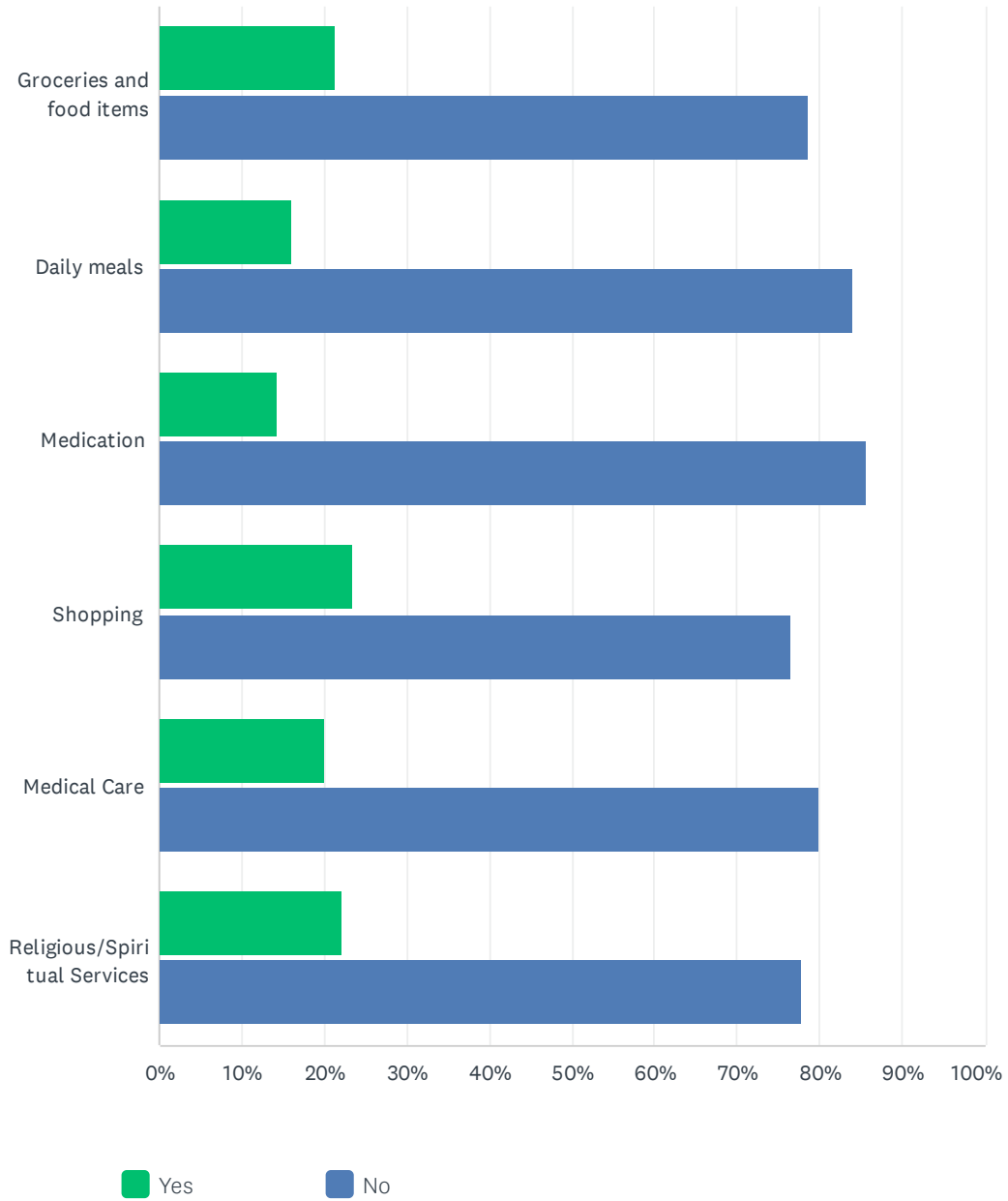
Answered: 2,170 Skipped: 422



ANSWER CHOICES	RESPONSES	
Yes, my spouse or family member helps me	35.02%	760
Yes, I pay for care though an agency	1.94%	42
Yes, through In-Home Supportive Services	9.63%	209
No, I don't have some one who helps me	53.41%	1,159
TOTAL		2,170

Q14 Due to COVID-19 has lack of transportation limited your ability to access:

Answered: 2,129 Skipped: 463



2021 Santa Clara County COVID-19 Impact Survey

	YES	NO	TOTAL
Groceries and food items	21.25% 444	78.75% 1,645	2,089
Daily meals	16.05% 327	83.95% 1,711	2,038
Medication	14.24% 290	85.76% 1,747	2,037
Shopping	23.44% 481	76.56% 1,571	2,052
Medical Care	19.96% 408	80.04% 1,636	2,044
Religious/Spiritual Services	22.17% 437	77.83% 1,534	1,971

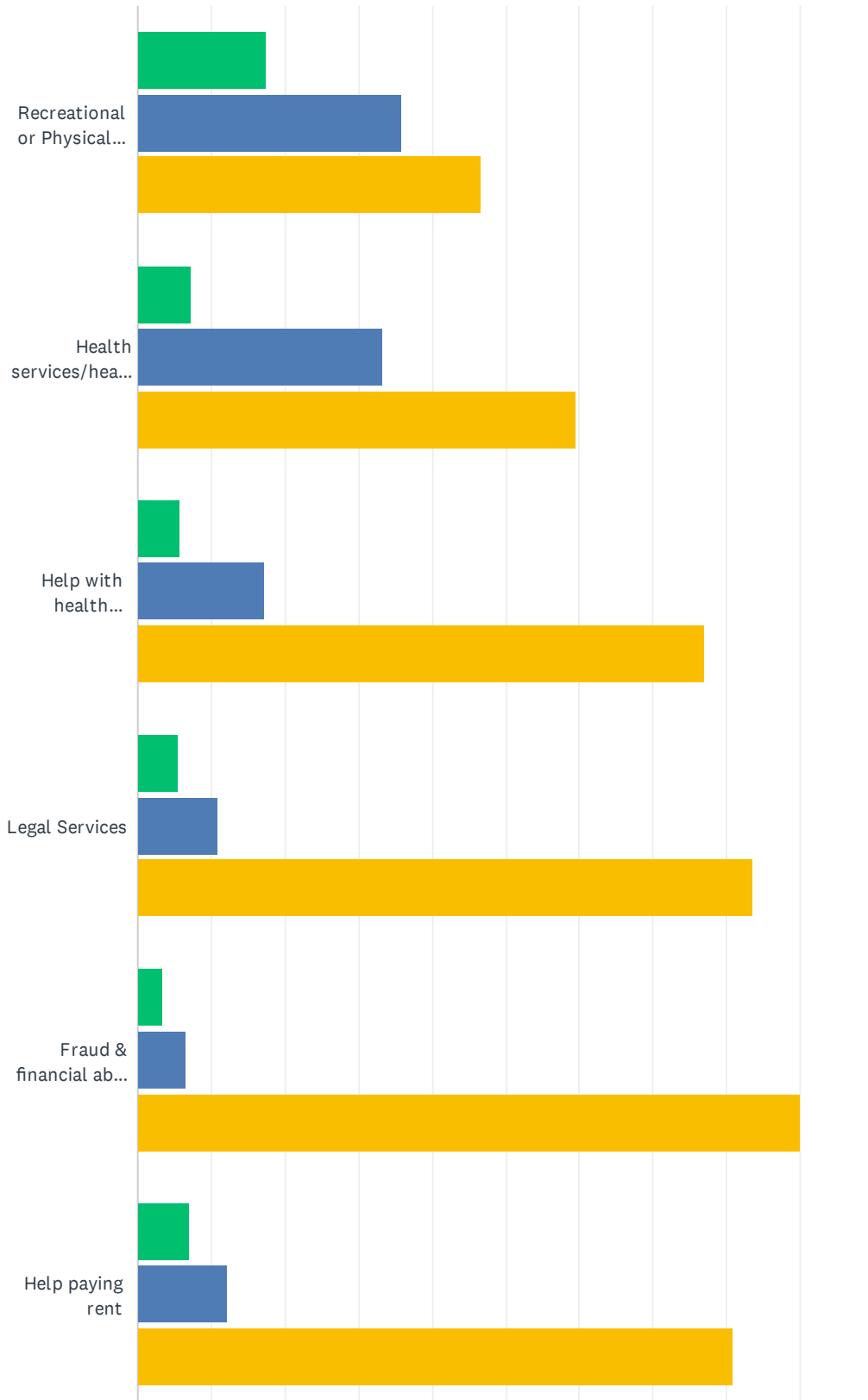
#	OTHER:	DATE
1	not covid - disabilities have limited my ability to access the following	2/8/2022 9:28 PM
2	my husband (caregiver) is the one in charge of all these matters	2/8/2022 9:25 PM
3	household essential items	2/3/2022 10:37 AM
4	family	12/18/2021 10:37 AM
5	social interactions	12/18/2021 9:56 AM
6	Try to avoid crowds. This limits activity.	12/18/2021 9:56 AM
7	having more difficulty walking due to pain tinging	12/10/2021 6:17 AM
8	household essential items	12/9/2021 4:20 PM
9	social activities - yes	12/7/2021 2:22 PM
10	due to illness of family member	12/7/2021 11:37 AM
11	Mi hija m da todo lo lo que necesito/my daughter gives me everything I need	12/7/2021 9:40 AM
12	Live in senior residential care	12/1/2021 6:03 PM
13	I live at a continuing care facility with services provided	11/30/2021 8:46 PM
14	Tengo un niño con neseidades especiales el si ocupa más ayuda que yo su mama elocupa terapias censoriales	11/30/2021 11:33 AM
15	Need social and emotional interaction.	11/29/2021 11:08 AM
16	I'm a caregiver for my two children with special needs. Staying home to keep them safer it's been difficult for all of us.	11/29/2021 10:04 AM
17	helping with deliveries, mail, garbage, cleaning. I have been approved for IHSS 33 hrs per week, but current provider is NOT VACCINATED. I indicated that I am partially VAX but have not gotten booster because I'm waiting for Public Health to send someone to my home for shot. Still waiting and need to get VAX	11/29/2021 9:45 AM
18	Pedi chiropractic acupuncture massage	11/28/2021 10:33 PM
19	Seeing My Daughter that is in a Group Home	11/26/2021 6:41 PM
20	Use online services	11/24/2021 3:05 PM
21	i don't have a lack of transportation - blessed to still drive	11/23/2021 12:36 PM
22	having vertigo and prone to falls, those limit my abilities	11/20/2021 11:38 AM
23	Exercise!	11/18/2021 1:57 PM

2021 Santa Clara County COVID-19 Impact Survey

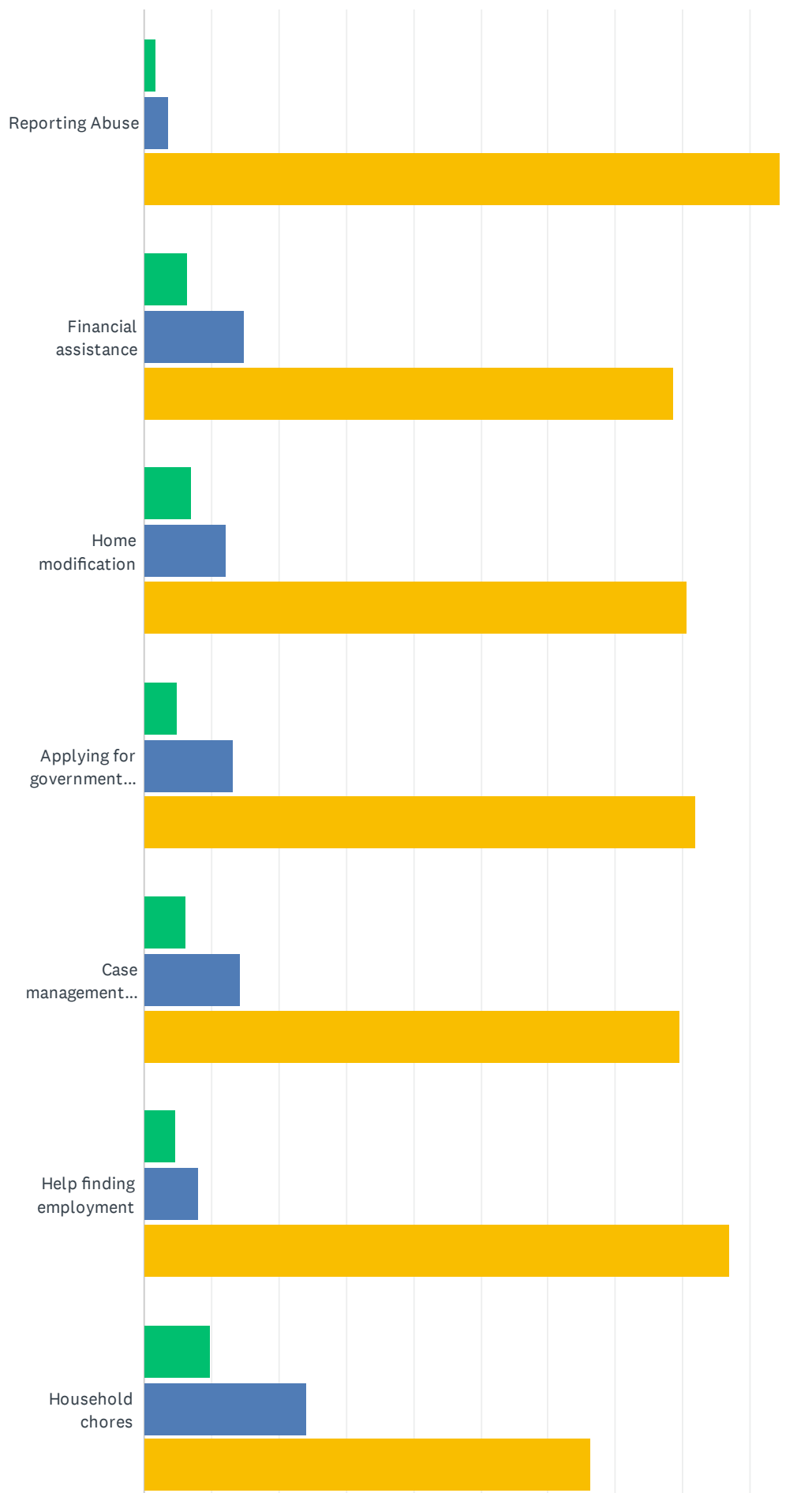
24	I have the transportation, but health prevents me going out.	11/18/2021 12:20 PM
25	Your buttons don't work well and this survey takes effort to land a check where I intend.	11/16/2021 8:56 PM
26	work harder to support family member who lost jobs	11/10/2021 10:36 AM
27	does not apply	11/8/2021 11:42 AM
28	Cultural events, travel to family members via public transpo	11/6/2021 4:07 PM
29	Everything changed with Covid	11/6/2021 4:03 PM
30	#12: I get some help just not enough. I am home alone most hours of the day. Thankfully, I am fairly mobile or am able to get around house using my walker.	11/6/2021 4:02 PM
31	Not because of lack of transportation, but of my adult child's noncompliance of wearing a face mask	11/6/2021 12:38 PM
32	I can drive	11/6/2021 8:30 AM
33	traveling to Europe	11/5/2021 6:57 PM
34	I am disable and I am not able to drive. My child help me	11/5/2021 4:21 PM
35	Health issues (not Covid-19 related prevent ability to drive!	11/5/2021 3:46 PM
36	Visiting Senior Center and classes	11/5/2021 9:11 AM
37	too expensive for gas	11/4/2021 10:33 PM
38	Socialization	11/4/2021 3:45 PM
39	insurance offered Uber to appointments but they often don't show up to pick me up	11/4/2021 2:24 PM
40	I do everything for.my self	11/4/2021 2:13 PM
41	It is the rising cost of food, gasoline & everything else that has negatively affected me.	11/4/2021 1:33 PM
42	Doing online	11/4/2021 1:06 PM
43	lack of access due to the tyranny of government	11/4/2021 12:59 PM

Q15 In the last 3 months, are you having difficulty accessing any of the services listed below?

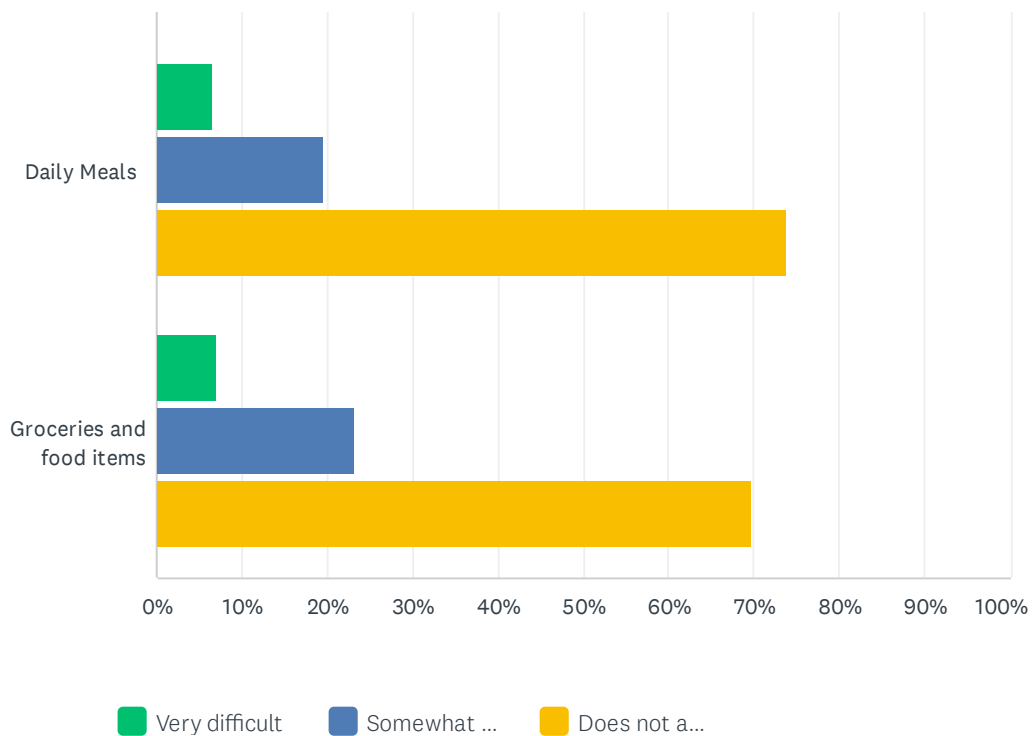
Answered: 2,048 Skipped: 544



2021 Santa Clara County COVID-19 Impact Survey

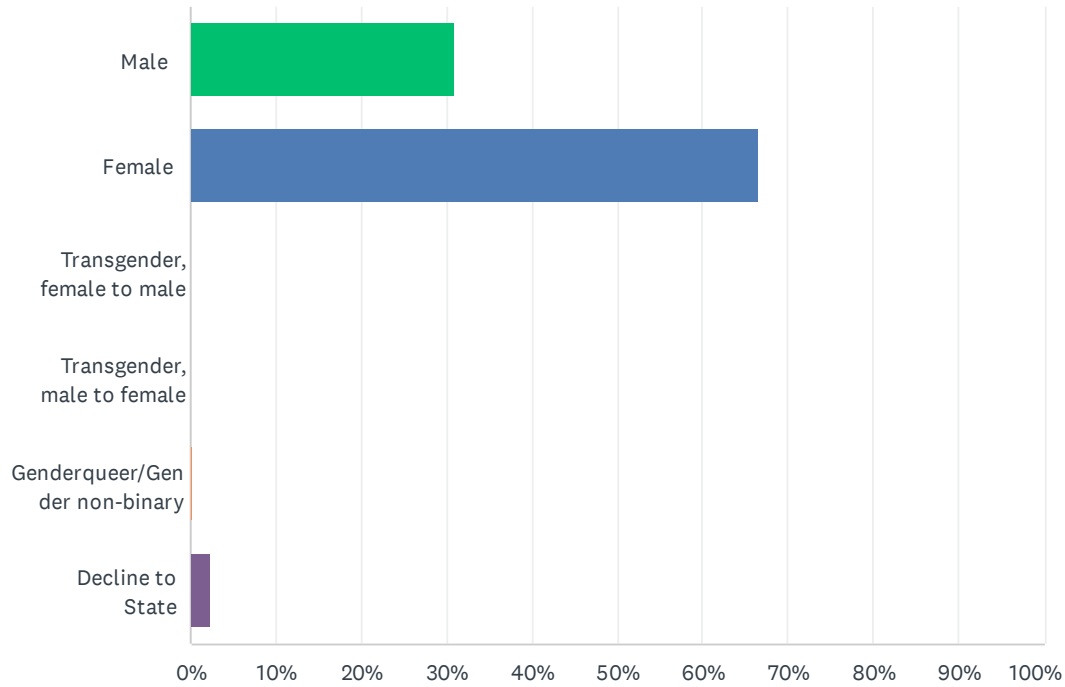


2021 Santa Clara County COVID-19 Impact Survey



Q16 What is your gender identity?

Answered: 2,070 Skipped: 522

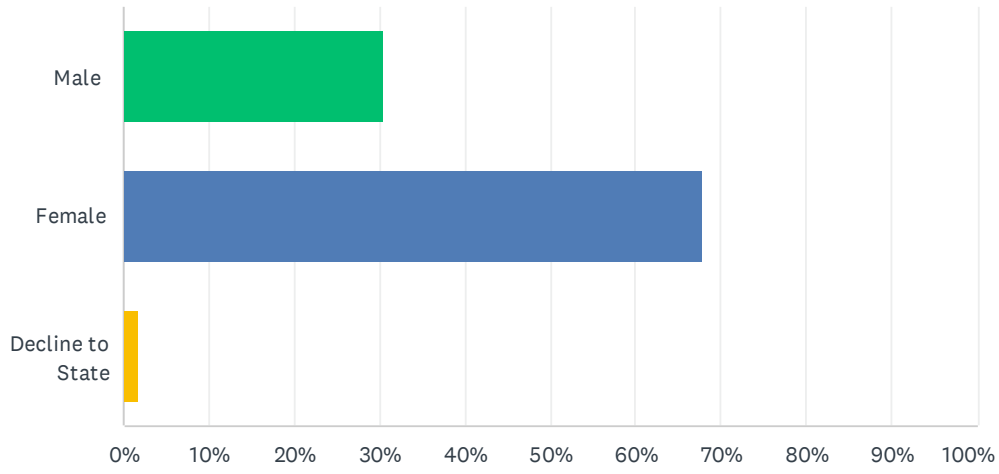


ANSWER CHOICES	RESPONSES	
Male	30.87%	639
Female	66.62%	1,379
Transgender, female to male	0.05%	1
Transgender, male to female	0.00%	0
Genderqueer/Gender non-binary	0.19%	4
Decline to State	2.27%	47
TOTAL		2,070

#	OTHER GENDER, PLEASE SPECIFY:	DATE
1	male/female	12/1/2021 6:13 PM
2	rediculous!	11/5/2021 7:01 PM
3	There are only 2 genders. I am a male. Oh	11/4/2021 2:08 PM

Q17 What is your sex at birth?

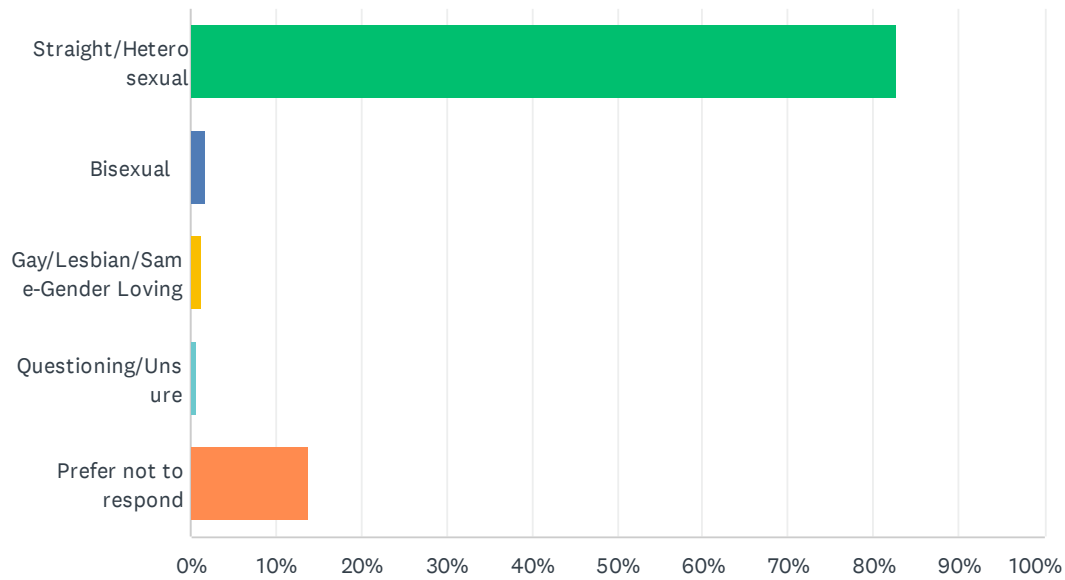
Answered: 2,068 Skipped: 524



ANSWER CHOICES	RESPONSES	
Male	30.51%	631
Female	67.75%	1,401
Decline to State	1.74%	36
TOTAL		2,068

Q18 How would you describe your sexual orientation or sexual identity?

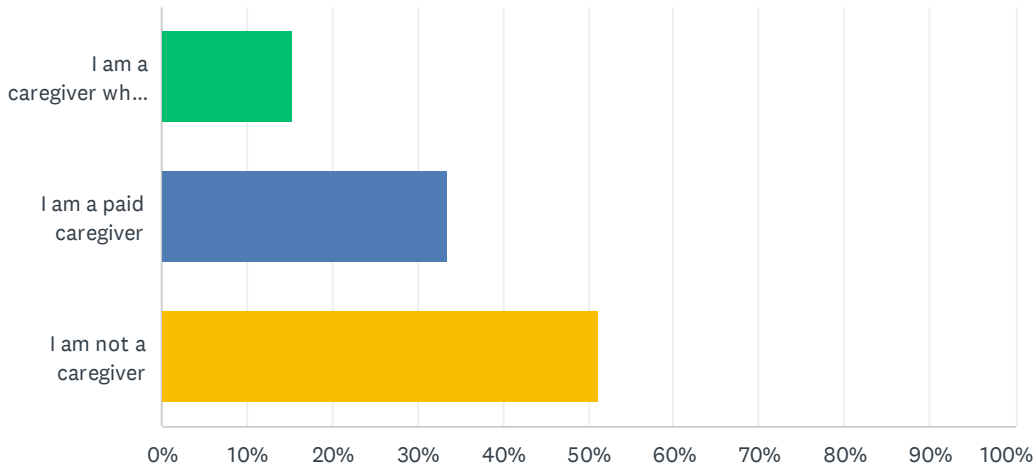
Answered: 2,020 Skipped: 572



ANSWER CHOICES	RESPONSES	
Straight/Heterosexual	82.62%	1,669
Bisexual	1.68%	34
Gay/Lesbian/Same-Gender Loving	1.29%	26
Questioning/Unsure	0.54%	11
Prefer not to respond	13.86%	280
TOTAL		2,020

Q19 An informal caregiver is an adult 18+ who cares for or helps a family member or another individual (friend, neighbor) complete day-to-day tasks or errands on a regular basis and is not paid to provide care. If you are an informal or paid caregiver, answer the questions. If you are not a caregiver select 'I am not a caregiver' to end the survey. Based on the definition above, which of the following best describes you:

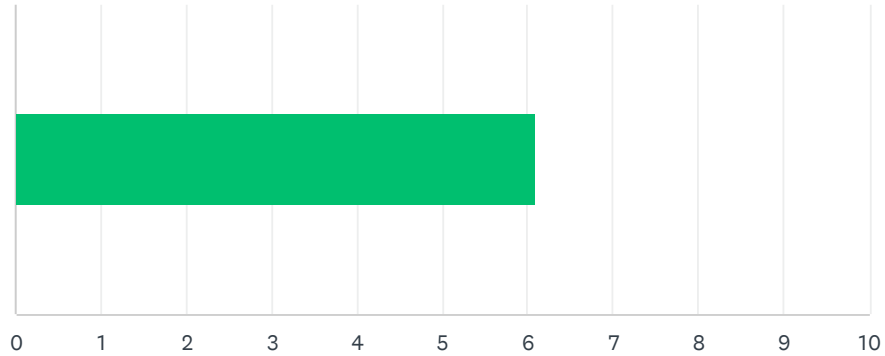
Answered: 1,872 Skipped: 720



ANSWER CHOICES	RESPONSES	
I am a caregiver who is not paid	15.28%	286
I am a paid caregiver	33.49%	627
I am not a caregiver	51.23%	959
TOTAL		1,872

Q20 As a caregiver, on a scale of 1-10, how would you rate your stress level? (1 = no stress, 10 = very high stress)

Answered: 854 Skipped: 1,738

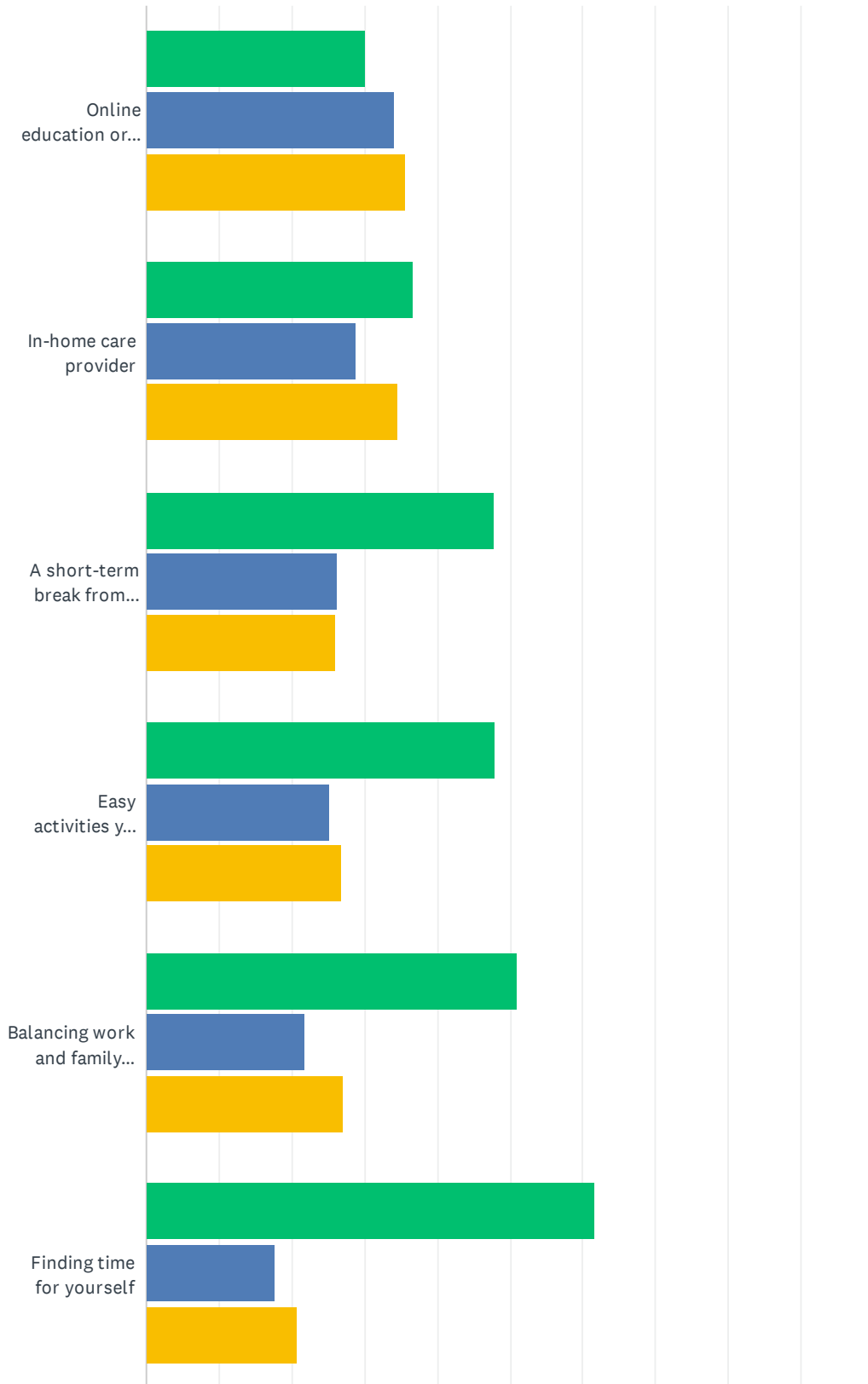


ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	6	5,201	854
Total Respondents: 854			

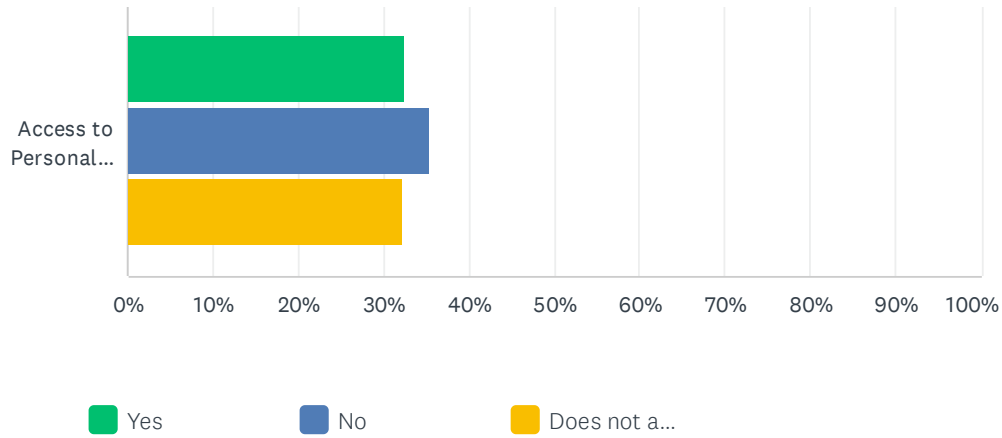
#		DATE
1	7	2/10/2022 1:06 AM
2	9	2/10/2022 1:01 AM
3	9	2/10/2022 12:40 AM
4	6	2/10/2022 12:17 AM
5	5	2/8/2022 10:14 PM
6	5	2/8/2022 9:46 PM
7	9	2/8/2022 9:34 PM
8	6	2/8/2022 9:29 PM
9	1	2/3/2022 10:41 AM
10	5	12/21/2021 2:24 AM
11	2	12/18/2021 11:13 AM
12	10	12/18/2021 11:09 AM
13	5	12/18/2021 10:50 AM
14	3	12/18/2021 10:47 AM
15	7	12/18/2021 10:44 AM
16	7	12/18/2021 10:43 AM
17	7	12/18/2021 10:37 AM
18	9	12/18/2021 10:36 AM
19	4	12/18/2021 10:36 AM

Q21 Which of the following do you feel you need more help with to support you as a caregiver?

Answered: 897 Skipped: 1,695



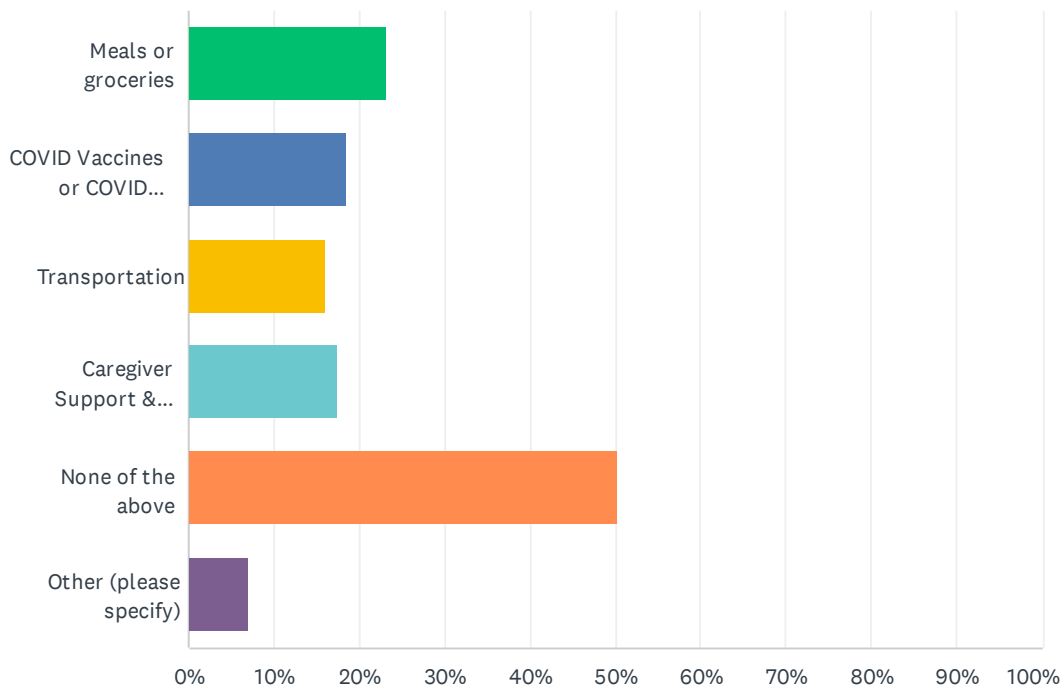
2021 Santa Clara County COVID-19 Impact Survey



	YES	NO	DOES NOT APPLY	TOTAL
Online education or classes on caregiving	30.14% 255	34.16% 289	35.70% 302	846
In-home care provider	36.57% 309	28.88% 244	34.56% 292	845
A short-term break from caregiving	47.72% 408	26.32% 225	25.96% 222	855
Easy activities you can do with the person you care for	47.99% 406	25.06% 212	26.95% 228	846
Balancing work and family responsibilities	51.06% 433	21.82% 185	27.12% 230	848
Finding time for yourself	61.65% 532	17.73% 153	20.63% 178	863
Access to Personal Protective Equipment (PPE) and supplies	32.46% 274	35.43% 299	32.11% 271	844

Q22 Do you need information on any of the following topics? Select all that apply

Answered: 1,463 Skipped: 1,129



ANSWER CHOICES	RESPONSES	
Meals or groceries	23.24%	340
COVID Vaccines or COVID Booster Shot	18.52%	271
Transportation	16.06%	235
Caregiver Support & Training	17.57%	257
None of the above	50.38%	737
Other (please specify)	6.97%	102
Total Respondents: 1,463		

#		