

OLDER ADULTS RECOVERY AND RESILIENCY (OARR) FUNDING APPLICATION INSTRUCTION

The following will provide the applying agency with instructions on how to complete the OARR application & budget to strengthen older adult's recovery and resilience from severe isolation and health impacts due to COVID-19.

Two documents are required:

1. Sourcewise OARR Funding Application (pages 1 - 5)
2. Sourcewise OARR Funding Program Budget (C1 - C5)

General

- OARR funding can only be used to expand the existing Legal services funded by Sourcewise.
- OARR funding can only be used to respond to the COVID-19 disaster by expanding and/or development of relief activities to meet the service delivery needs of vulnerable older adult and/or caregivers in targeting geographic regions or the county of Santa Clara.
- OARR Matching Contribution Requirements: No match required
- OARR Funded Title III programs are subject to the required OAA program monitoring, fiscal monitoring, and auditing by Sourcewise, the State or Federal entities upon request.
- OARR funding is separate from all other Title III Funding including other emergency funding like (CARES Act, FFRCR, CAA, Title XX, ARPA) and should be tracked separately. Quarterly Data reporting includes the following:
 - Number of service units delivered
 - Number of persons served
 - Total expenditure amount
 - Brief narratives describing the process, successes, and challenges of the program development, including a description of Title III B program prior to the OARR investment spending, and including a description of what has changes and developed due to OARR investment spending.
- OARR funding awarded to the applying organization will require an executed agreement prior to carrying out any parts of the project outlined in the application and/or budget.

Scope of Work

Title III-B Legal Assistance Services
Program Specific Scope of Service:

1. Make legal assistance available and accessible, at no cost, throughout the PSA to the targeted groups identified in the Area Plan.
2. AAAs shall give priority to legal assistance related to the following areas:
 - a. Income
 - b. Health Care
 - c. Long-term care
 - d. Nutrition
 - e. Housing
 - f. Utilities
 - g. Protective Services
 - h. Defense of guardianship or conservatorship



- i. Abuse
 - j. Neglect
 - k. Age Discrimination
3. Primary focus shall be the direct representation of older individuals in legal matters.
 4. Include in its application specific techniques to be used to make clients aware of the legal assistance that will be provided.
 5. All attorneys providing legal assistance must be licensed and in good standing to practice law in the State of California and shall carry malpractice insurance. Legal assistance may be provided by law students or paralegals only under direct and regular supervision of a licensed attorney.
 6. Funds received shall be used to maintain or increase the level of legal assistance furnished to older individuals. Funds shall not be used to supplant funds from other federal or non-federal sources.

Title III-C-1 Congregate Intergenerational Activities

Program Specific Scope of Service:

1. Conduct services and activities that support the goal to pursue and conduct intergenerational activities for the purpose of connecting older adults with children/adults in conjunction with the OCNP. Examples of intergenerational activities include, but are not limited, the following:
 - a. Development or maintenance of partnerships and collaborative efforts with programs serving children to foster intergenerational connections between older adults and children;
 - b. Planning, development, or implementation of shared sites with programs serving meals to children to promote intergenerational meal programs;
 - c. Planning, development, or implementation of intergenerational cooking demonstrations or classes;
 - d. Planning, development, or implementation of shared garden site and intergenerational gardening activities;
 - e. Virtual or in-person intergenerational social activities related to the C-1
2. OARR funding may be used to provide meals for participants in activities that support intergenerational connections, however, OARR funding may not supplant funds that would otherwise be available for other nutrition programs.
3. Promote and maintain high standards of food safety and sanitation as required by the California Retail Food Code.
4. Provide meals in accordance with the OAA and California Code of Regulations (CCR).

Title III-C-2 Intergenerational Activities

Program Specific Scope of Service:

1. Conduct services and activities that support the goal to pursue and conduct intergenerational activities for the purpose of connecting older adults with children/adults in conjunction with the OCNP. Examples of intergenerational activities include, but are not limited, the following:
 - a. Development or maintenance of partnerships and collaborative efforts with programs serving children to foster intergenerational connections between older adults and children;
 - b. Planning, development, or implementation of intergenerational cooking demonstrations or classes;
 - c. Planning, development, or implementation of shared garden site and intergenerational gardening activities;
 - d. Virtual or in-person intergenerational social activities related to the C-2 program;
 - e. Virtual or in-person adult lunch companion for C-2 participants.

2. Provide meals for participants in activities that support intergenerational connections, however, OARR funding may not supplant funds that would otherwise be available for other nutrition programs.
3. Promote and maintain high standards of food safety and sanitation as required by the California Retail Food Code.
4. Provide meals in accordance with the OAA and California Code of Regulations (CCR).

Timeline: Within the OARR Funding Application for April 1st 2023 - December 31, 2023 the OARR award amount presented by Sourcewise with this application must be expended by December 31, 2023.

OARR Application Form Instructions

PAGE 1

1. Complete the header section with your Agency and Program Name, Funding Type, Contact Name, Phone number, and E-Mail address. The Funding Type is Title III C for Congregate and Home-Delivered Intergenerational Activities and Title III B Legal Assistance
2. Write a narrative description of services to be provided. INCLUDE AT A MINIMUM THE FOLLOWING:
 - a. An explanation of how funding will be used to expand and/or respond to the COVID-19 disaster to provide additional services (units/unduplicated persons) during the contract term from April 1st 01, 2023 through December 31, 2023.
 - b. Use the Exhibit-1 Ensuring Equity in Program Planning & Delivery attached to these instructions to guide service planning and delivery with equity in mind while developing your proposal for delivery of services/program response to COVID-19.
 - c. Use existing data and research specific to Santa Clara County.

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3. Based on the narrative on Page 1 list the type of units to be provided through the OARR application, the number of units, and the unduplicated persons served.
4. Include the Total Cost (B34) and Total OARR Grant funds requested (D34) from Sourcewise. The dollar amount totals can be pulled from the "OARR Program Services Budget Summary Worksheet".
5. Have an authorized agent from your agency sign and date the request form. Electronic signatures are acceptable.

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Goals & Objectives

Goals and Objectives must be specific, measurable, and attainable. Update Goals and Objectives where there is sufficient change.

Use Exhibit-1 Ensuring Equity in Program Planning & Delivery attached to these instructions to guide Title III service planning and delivery to the community with equity in mind.

A. Targeting

Title III C-1 Congregate Intergenerational Activities Targeted Population definition

All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19.

Title III C-2 Home-Delivered Intergenerational Activities Targeted Population definition

All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19.

Title III B Service Targeted Population definition

To expand existing legal services that assist older adults, and older adults with disabilities, with a variety of legal problems concerning housing, consumer fraud, elder abuse, Social Security, Supplemental Security Income (SSI), Medicare, Medi-Cal, age discrimination, pensions, nursing homes, protective services, conservatorships, and other matters.

Priority to legal assistance related to the following areas:

- a. Income.
- b. Health care.
- c. Long-term care.
- d. Nutrition.
- e. Housing.
- f. Utilities.
- g. Protective services.
- h. Defense of guardianship or conservatorship.
- i. Abuse.
- j. Neglect.
- k. Age discrimination

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.

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

F. Client Contributions:

Only if serving meals will the agency be required to provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OARR 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.

Services Budget

This budget is very similar to a standard Sourcewise OAA Program Service Budget. Only show funding, expenses, etc. for OARR funding. For example, if your program is approved for \$5,000 of, only show the staffing, operating expenses, etc. for that \$5,000.

General Service Budget Guidance

- Round all numbers to the nearest whole dollar.
- All cells with blue backgrounds are locked from editing because they contain a formula.
- Planned equipment purchases with the use of OARR funding awarded through this application must be approved prior to purchasing by Sourcewise and the California Department of Aging and is subject to monitoring and annual tracking. Please include the equipment per unit price and the total number of units requested. Once this information is received Sourcewise will provided the required justification forms for your organization to complete to submit for approval.

Funding Types

- Grant Funds - This reflects the actual Title III amount from Sourcewise.
- Program Income - income earned by the program that is directly generated by providing the program. The most common source of this is income from client fees or client contributions provided as a direct result of providing the service. Other examples include fundraising in the name of the program, and rents or payments to the program for use of facilities, interest, etc.

Program Income must be used for costs directly related to that program and shall be spent before Sourcewise funds are applied. It does not qualify as match.

Budget Form Instructions

Tab C1 - Summary

Enter the name of your Agency and Program, and the Funding Type.

The amounts will be automatically pulled from the other tabs in the workbook.

Sourcewise is listed first and will pull Grant Funds and Estimated Annual Income directly from other parts of the workbook. List the sources of income that will support the program.

List other sources of income, such as specific counties, cities, foundations, volunteer sources, donations, along with categorizations of the income.

Tab C2 - Personnel

List the titles of each paid or in-kind staff members used in support of the program (column A), the percentage of time spent working on the program (B), and their annual salary at 100% FTE (C). Total Program Cost will calculate automatically. The sum of columns E through L must equal Total Program Cost as mentioned above in the General section.

Tab C3 - Taxes & Benefits

List the titles of each paid staff member or in-kind staff members (automatically pulled from Tab C2 - Personnel) receiving benefits in support of the program (column A) and their appropriate payroll taxes and employee benefits (B). If an employee is exempt, so state. The sum of columns C through J must equal Total Payroll Taxes & Fringe as mentioned above in the General section.

Tab C4 & C5 - Assorted I & II

List a description of the budget category (column B) and the total cost of the budget category (C). The sum of columns D through K must equal Total Program Cost as mentioned above in the General section. Budget categories are defined as follows:

104 - Travel (In-State only)- This category is for staff and volunteer travel costs related to the program. Staff travel and operational travel must be listed separately. The line item must include mileage reimbursement rate and the number of miles traveled per month.

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

106 - Equipment -List each item and indicate if equipment will be purchased or leased, the cost per month, and cost of maintenance and repair. Equipment purchase must be pre-approved from Sourcewise.

107 - Occupancy - Enter the cost of building space and utilities charged to the program. Indicate square footage, monthly rent, and duration of lease. 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 such. Enter the cost of publications that relate to the proposed program as a separate line item.

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

112- Insurance - Record all the costs of insurance (except Workers Compensation or any employee health insurance) necessary to support the proposed program.

113 - Other Costs - Enter additional cost items that cannot be assigned to any other category. Any item listed must include the amount and a brief description of the service. 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 the contractor nevertheless incurs. 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 grant funds to pay Indirect costs up to a maximum of 10% of direct costs, excluding in-kind contributions, capital equipment and contract services.

115 - Subcontracts - If the grant will be subcontracted, enter the subcontractor costs.