



# OLDER AMERICANS ACT (OAA) INVITATION FOR BID/ REQUEST FOR PROPOSAL 2024-2025 PROCEDURE

## PART 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 in Santa Clara County. The goal of Sourcewise is to provide a comprehensive system of services to older people to allow them to live independently and avoid inappropriate institutional placement.

Sourcewise's annual planning process identifies the needs of older adults and individuals with disabilities in Santa Clara County and develops Area Plan objectives to address these needs. The objectives are accomplished, in part, through the purchase of services from community-based organizations. For the 2024-2025 fiscal year starting on July 1, 2024, through June 30, 2025, Sourcewise invites the submission of proposals for the provision of the following supportive services including:

- Title III B Adult Day Care/Health Services
- Title III B Case Management
- Title III B Legal Services
- Title III B LTC Ombudsman Services
- Title III C Congregate Meals
- Title III C Home Delivered Meals
- Title III D Disease Prevention & Health Promotion
- Title III E FCSP Respite In Home
- Title III E FCSP Respite Out of Home
- Title III E FCSP Caregiver Training
- Title III E FCSP Community Education on Caregiving
- Title III E Older Relative Caregiver Case Management
- Title VII A LTC Ombudsman Services
- Title VII Elder Abuse Prevention
- LTC Ombudsman<sup>1</sup>

Agencies interested in submitting a Request for Proposal, can find more information on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>.

The Request for Proposal Program Standard provides detailed instruction to support agencies through proposal development and submission process.

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<sup>1</sup> LTC Ombudsman combines funding from: State Health Facilities Citation Penalties Account, Skilled Nursing Facilities Quality and Accountability Fund, Public Health Licensing and Certification Program Fund.

## Older Americans Act (\_\_\_Contracts):

Activities funded under this request for proposal should support the goals of the Older Americans Act to reflect changes in the needs of the aging population to fund community-based service programs that address the evolving needs of older adults, people with disabilities, and caregivers.

## PART II. GLOSSARY OF TERMS

**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. 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.

**ADL:** Activities of Daily Living. Indicates the person's total score on the Katz Index of Independence in Activities of Daily Living (ADL). Activities include bathing, dressing, toileting, transferring, continence, and feeding. Permissible values are 0-6.

**Adult Day Care:** Services or activities provided to adults who require care and supervision in a protective setting for a portion of a 24-hour day. Includes out of home supervision, health care, recreation, and/or independent living skills training offered in centers most commonly known as Adult Day, Adult Day Health, Senior Centers, and Disability Day Programs.

**Audience Size:** For non-registered services for which an unduplicated count of participants may not be feasible, reporting an audience size is acceptable instead.

**Bidder:** The applicant organization responding to the Request for Proposal. This term is used interchangeably with 'applicant.'

**CDA:** California Department of Aging

**Case Management:** Assistance either in the form of access coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing, and coordinating services among providers, and providing follow-up and reassessment, as required.

**Congregate Meals:** A meal provided to an eligible individual in a congregate group setting, that meets all the requirements of the Older Americans Act and State/Local laws and assures a minimum one-third of the Dietary Reference Intake and shall comply with Dietary Guidelines for Americans.

**Contract:** An official document binding both parties regarding the program and services to be provided. The selected proposed budget and Title III, Title VII 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.

**Elder Abuse Prevention, Education, and Training:** Public education and training of professionals to develop, strengthen, and carry out programs for the prevention, detection, assessment, and

treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation). This includes training for Title III E caregivers.

**Elder Abuse Prevention, Educational Materials:** Educational materials and guidance kits distributed for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).

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

**Focal Point:** A designated senior center that provides a broad spectrum of senior services.

**FCSP:** Family Caregiver Support Program, same as Title III-E. The Family Caregiver Support Program (FCSP) provides grants to states and territories to fund various supports that help family and informal caregivers care for older adults in their homes for as long as possible.

**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.

**FCSP Caregiver Training:** An FCSP service that provides family caregivers with instruction to improve knowledge and performance of specific skills relating to their caregiving roles and responsibilities. Skills may include activities related to health, nutrition, and fiscal management; providing personal care; and communicating with health care providers and other family members. Training may include the use of evidence-based programs; be conducted in-person or on-line and be provided in individual or group settings.

**FCSP Caregiver Respite In-Home:** An FCSP respite service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.

**FCSP Caregiver Respite Out-of-Home:** An FCSP respite service provided in settings other than the caregiver/care receiver's home, including adult day care, senior center, or other non-residential setting (in the case of older relatives raising children, day camps), where an overnight stay does not occur.

**FCSP Community Education on Caregiving:** An FCSP public and media activity that conveys information to caregivers about available services, including in-person interactive presentations, booth/exhibits, or radio, TV, or website events. This service is not tailored to the needs of the individual. [Previously NAPIS Public Information on Caregiving]. An FCSP service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).

**FCSP Older Relative Caregiver Case Management:** An FCSP service provided to a caregiver, at the direction of the caregiver by an individual who is trained and experienced in the case management skills that are required to deliver services and coordination; and to assess the needs, and to arrange, coordinate, and monitor an optimum package of services to meet the needs of the caregiver.

**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, 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.

**Health Promotion Evidence-Based:** Activities related to the prevention and mitigation of the effects of chronic disease (including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. Activities must meet ACL/AoA's definition for an evidence-based program. Activities that meet ACL/AoA's definition for an evidence-based program or are considered an "evidence-based" program by an operation division of the U.S. Department of Health and Human Services and shown to be effective and appropriate for older adults are funding through Title III-D.

**Home-Delivered Meals:** A meal provided to an eligible individual in their place of residence, that meets all of the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Nutrition services provided to frail, homebound, or isolated older individuals including meals, nutrition education, and nutrition risk screening.

**Legal Assistance:** Legal advice, counseling and/or representation by an attorney or other person acting under the supervision of an attorney.

**Long-Term Care Ombudsman:** Identifies, investigates, and resolves complaints made by or on behalf of residents of long-term care (LTC) facilities that affect the residents' health, safety, welfare or rights. LTC Ombudsman program provides residents of LTC facilities with access to Ombudsman representatives who will advocate for their quality of care and quality of life.

**Matching Contributions:** The cash and/or in-kind contribution made by the bidder organization that qualifies as a match for the request for funds.

**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 which is owned and operated by one or more corporations or associations with no part of the net earnings benefiting any private shareholder or individual.

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

**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.

**Registered Service:** Detailed client information for the client is required to be collected and reported if when providing service. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information including Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Name
- Birthdate
- Zip Code
- Rural Status
- Nutrition Risk assessment
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Veterans Status
- Ethnicity
- Poverty Status
- Living Status
- ADLs / IADLs Assessment

**Restricted Service:** A service provided using OAA funds in whole or in part for which demographic and consumer characteristics are reported in aggregate and consumer, personal identifying information (PII) is not shared or recorded at other than the provider level (e.g., legal assistance).

**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 bidder's OAA application to carry out part of the award to meet the unit of service requirements and/or program objectives outlined in the RFP Title III B/C/D/E, Title VII, LTC Ombudsman Program Standards. A subcontractor is upheld to similar program/administrative requirements as outlined by in the Sourcewise contract, if awarded.

**Subcontract:** Means any form of legal agreement between the awarded bidders/contractor and the Subcontractor, including an agreement that the Area Agency on Aging/Sourcewise considers a contract, including vendor type Agreements for providing goods or services under this Agreement.

**Target Population:** Persons 60 years and older who are in the greatest social need, the greatest economic need, with particular attention to low-income minority older individuals, older individuals with Limited English Proficiency (LEP), and older individuals residing in rural areas.

**To-Go Meals:** Meals that are picked up by clients (or client's agent) who are not comfortable dining in a congregate meal setting.

- a. C-1: To-Go meals are categorized as C-1 meals if they are consumed onsite and in-person interaction (e.g., one-on-one with program volunteer) or consumed offsite and include virtual interaction (e.g., group interaction via Zoom, FaceTime, MS Teams, etc. or one-on-one with program volunteer via telephone) during the meal.
- b. C-2: To-Go meals are categorized as C-2 meals if they are consumed offsite without in-person or virtual interaction.

**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:** Define as new person served. A client is considered new, only once within the fiscal year, when he/she first utilizes a covered service. A client, who has never been previously registered as a client for the service in the current fiscal year, may be counted as unduplicated. Bidders submitting proposals are required to include an unduplicated person count to provide services. Reporting requirements are described and nonnegotiable for registered and nonregistered Older Americans Act funded services.

**Vendor:** Means an entity selling goods or services to the bidding agency during the bidder's proposed performance of the project outlined in the RFP. A vendor is not responsible for carrying out Title III/Title VII/Ombudsman administrative/programmatic/matching contribution requirements which the bidding agency is primarily responsible for and is recognized as the subcontractor. The vendor is required to uphold the insurance, bonding, and security requirements which are outlined in the awarded bidding agency contract.

**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 contribution.



### III. AAA TECHNICAL ASSISTANCE AND COORDINATION<sup>2</sup>

(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 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.
    - (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 is 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.

### IV. 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

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<sup>2</sup> 22 CCR 7252

California Department of Aging and is subject to change. Funding is contingent upon the availability of state and 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 the assets of each community must be highlighted and used to help us move in culturally appropriate and inclusive ways.

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

**C. Program Assigned Responsibilities:** Sourcewise will provide oversight on select program administration and operations, and the awarded bidder will be assigned responsibilities to ensure the full scope of the required program requirements are met to successfully provide services in the PSA during in the defined contract period. The responsibilities are outlined in the IFB/RFP Procedure and will be detailed in the contract agreement.

**D. Required 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 Program Standard of the Title III, Title VII, and Ombudsman program.

Older Americans Act funding is not intended to be sole support for any service provided. Funding from other sources is necessary to effectively provide services. Additional points for otherwise responsive proposals will be awarded to applicants who exceed the minimum matching requirements.

**E. Program Support:** Bidders must assure that Older Americans Act funds are not used to replace funds from non-federal sources and must take steps to obtain support from private sources and other public organizations for services. The intent of this funding is to serve as a catalyst for receipt of additional funding.

**F. Equipment Monitoring and Availability:** Submit the model numbers, cost, age, and condition of equipment that will be or has been purchased with Older Americans Act funding. Equipment purchased with OAA funding will be monitored annually. Equipment/Property with per unit cost over \$5,000 or any computing devices, regardless of cost require justification from the Contractor and approval from Area Agency and must be included in the Older Americans Act approved program budget.

**G. Contract Period:** The contract period for programs included in this RFP is a twelve-month period from July 1, 2024, through June 30, 2025. Yearly contract renewals up to three years following the initial contract year are allowable at the discretion of the AAA subject to annual renegotiation and availability of federal, State, and local funding.



- H. Multiple Contract Awards:** Sourcewise reserves the right to enter into 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 my 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.
- K. 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.

## V. 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 2020, 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 below. 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 has been selected to assure that all necessary program requirements are met before the contract is signed. 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.

### (i). General Older American Act Program Requirements

#### A. Targeting Populations:

**(a) Bidders (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 60+ with the greatest economic need, with particular attention to low-income minority individuals. The term “greatest economic need” means the need resulting from an income level at or below the federal poverty line.
- (2) Older individuals 60+ with the greatest social need, with particular attention to low-income minority individuals. The term “greatest economic need” means the need caused by non-economic factors which include:
  - Physical and mental disabilities
  - Language Barriers and cultural or social isolation caused by, among other things, racial and ethnic status, sexual orientation, human immunodeficiency virus (HIV) status, gender identity, or gender expression that does either of the following:

1. Restricts the ability of an individual to perform normal daily tasks.
2. Threatens the capacity of the individual to live independently.
- (3) Older Native Americans.
- (4) Caregiver as defined in Title III E, which includes older caregivers providing care and support to persons with developmental disabilities.

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

- (1) Who are isolated, abused, neglected and/or exploited.
- (2) Who are frail and the caregivers of these individuals.
- (3) Who reside in rural areas.
- (4) Who have greatest economic need, with particular attention to low-income minority individuals.
- (5) Who have greatest social need, with particular attention to low-income minority individuals.
- (6) With severe disabilities.
- (7) With limited English-speaking ability.
- (8) 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, bidders shall address 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 substantial number of the targeted groups reside.

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:**

Bidders must form and administer cooperative agreements with other community agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services.

**C. Public Information and Outreach:**

Bidders must have planned public information and outreach activities, including distribution of a brochure, to ensure the participation of those eligible older persons are of the target population.

**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.

**E. Client Contribution:**

Bidders must provide clients with the opportunity to contribute voluntarily and confidentially to the cost of the service.

**F. Client Input:**

Bidders must have a procedure for obtaining the views of the participants of the service being provided.

**(ii). Health standards regarding the preparation & transport of Title III C-1 Congregate Meals and Title III C-2 Home Delivered Meals Requirement:**

- A. Bidders must adopt the implementation and enforcement of proper food preparation, handling, and storage practices. Strict compliance with food preparation and sanitation practices shall be followed, as specified in the California Retail Food Code and California Code of Regulations, Title 22, Division 1.8 California Department of Aging<sup>3</sup>

**VI. LOCAL SOURCEWISE REQUIREMENTS**

**Priorities and Preferences:** Preference will be given to those bidders meeting the definition of minority provider<sup>4</sup>, specifically those applying for service provision to geographic areas with high concentrations of low-income minority elders and underserved/vulnerable populations in Santa Clara County.

**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 bidders that subcontract with minority provider for services to low- income minority persons which identify as the greatest economic need.

**Late Proposal Submissions or Revisions:** Proposals submitted after the deadline will not be accepted.

**Contract Award Requirements:** Following are additional contractual obligations for all Sourcewise contractors that will influence the submission of a proposal:

1. **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.
2. **Program, Fiscal Reporting, and Record Keeping:** Service providers will be required to submit monthly and/or quarterly reports on various aspects of program activities in accordance with the Sourcewise 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 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 and program income in accordance with federal and state requirements.

Registered service providers are required to submit monthly detailed fiscal reports by the 10<sup>th</sup> day of the following month for the previous month to request payment of contract services. All costs reported by the provider should be clearly identified in the financial supporting documentation, including required Sourcewise templates.

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<sup>3</sup> 22 CCR § 7638.5

<sup>4</sup> Minority Agency: 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.

Non-registered service providers are required to submit a quarterly detailed fiscal report to successfully request contract funds. All costs reported by the provider in monthly and final fiscal reports must be supported by appropriate accounting documentation.

3. **Grievance Procedure:** Upon award, the bidder is required to submit a written grievance process for reviewing and attempting to resolve complaints of older individuals receiving services funded the Older Americans Act, in accordance with 22 CCR § 7400 and defined by Sourcewise in the contract.
4. **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).
5. **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.
6. **Transition Plan:** A transition plan is required to identify the bidder's organization plan to: (1) transition the service delivery; and (2) terminate and/or transfer services if required. The transition plan is required as part of the bidding application process.
7. **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.

8. **Bonding:** Bidders will be required to secure and maintain during the contract period a commercial fidelity bond in the penalty of either \$10,000 or 20% of the total contract award, whichever is larger, to protect against misappropriation of funds by any employee or volunteer or the agency.

9. **Audits:** Bidders will be required to submit to Sourcewise an audit of expenditures made under the contract award. This audit must be conducted by an independent auditor or auditing firm in accordance with federal guidelines and must specifically identify revenue, expenditures, matching funds, and program income from the 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).

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

11. **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.

12. **Contractors and Sub-contractors:** 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.

13. 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), Article 6 (Title III C-Elderly Nutrition Program), §7630 through §7638.13 (pages 174.21 through 174.27) of Register 2002, No. 2; 1-11- 2002;

- California Retail Food Code (CRFC);
- Dietary Reference Intakes (DRI) and Dietary Guidelines of Older Americans Act Nutrition Programs as determined by the United States Department of Agriculture (USDA);
- 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](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](http://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](#).

Bidders can review Sourcewise policy & procedure manual, memorandums, 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](mailto:adelpinal@mysourcewise.com))



## PART III: REQUEST FOR PROPOSAL GENERAL INFORMATION

### I. SUBMISSION OF PROPOSAL

The program specific requirements for eligible services included in the Request for Proposal for 2024-2025 fiscal year is available on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>.

The Sourcewise Older American Act Application is available on the Sourcewise website at: <https://mysourcewise.com/support-sourcewise/grantees/>. An application is required to be completed for each program. When the bidding agency submits the application, an original, plus five copies should be submitted in the order in which it is presented.

The bidder will bear all costs of developing the proposal and submitting one original and five 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     |

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 the award. To withdraw a proposal an authorized bidder representative must deliver a signed request of withdrawal by email to Judy Nguyen, Vice President of Finance, Risk & Compliance at [jnguyen@mysourcewise.com](mailto:jnguyen@mysourcewise.com) and telephone call to (408) 350-3233 to confirm receipt of the withdrawal.

### II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below for all Older Americans Act Titles, please review carefully and plan accordingly. Detailed steps describing the RFP process are available in this document.

#### Schedule for Title III B, Title III C, Title III D, Title III E, Title VII and LTCO Ombudsman Request for Proposal<sup>5</sup>

Older Americans Act announcement, Mercury Newspaper	4/7/24-4/8/24
Notice of Funding Announcement on website	4/5/24
OAA Application & Program Standards available on website	4/8/24
Bidders Conference	4/11/24
Letter of Intent Due	4/12/24 4PM
Due date for proposals	5/7/24 at 4PM
RFP Evaluation	5/8/24-5/18/24
Evaluation Committee recommendations	5/21/24
Board of Directors approval	5/23/24

<sup>5</sup> The timeline outlined in the IFB/RFP Procedure is subject to change and/or Sourcewise reserves the right to issue an addendum or amendments to this RFP timeline.

Notification of contract awards, mail & email	5/29/24
Deadline for appeals	6/7/24
Contract negotiations and signature	5/29/24-6/10/24
Services Begin	7/1/24

### III. STEP BY STEP INSTRUCTIONS

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

#### Step 1 Announcement of Request for Proposal:

View all Request For Proposal (RFP) available on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>

#### Step 2 Bidders Conference:

Attend the Bidder's Conference scheduled on Thursday, April 11, 2024, from 10:00 a.m. - 11:00 a.m. via Zoom teleconference.

Older Americans Act (OAA) Bidder's Conference  
Time: Apr 11, 2024, 10:00 AM Pacific Time (US and Canada)

Join Zoom Meeting  
[Click here to join the meeting](#)  
Meeting ID: 882 6191 5785

Or call in (audio only)  
One tap mobile  
+16699009128,,88261915785#,,,,\*890711# US (San Jose)  
+16694449171,,88261915785#,,,,\*890711# US

#### Step 3 Letter of Intent Submission:

The Letter of Intent must be submitted by the bidder on/or before Friday, April 12, 2024, to Sourcewise by 4:00 p.m.

All bidders must complete and return the letter of intent.

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 Judy Nguyen at [jnguyen@mysourcewise.com](mailto:jnguyen@mysourcewise.com).

#### Step 4 Proposal Submission:

**All Title III B, Title III C, Title III D, Title III E, Title VII and LTCO programs completed proposals must be submitted on May 7, 2024, at 4:00 p.m.**

Complete paper & electronic proposals must be submitted to Sourcewise, or they will not be considered for funding on **Tuesday, May 7, 2024, at 4PM**. The below submissions are required:

- **Emailed:** One (1) complete electronic proposal submitted by email to Judy Nguyen [jnguyen@mysourcewise.com](mailto:jnguyen@mysourcewise.com)
- **Hardcopies:** One (1) original and five (5) 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, faxed, or e-mailed submissions are not acceptable.

**Step 5 RFP Evaluation:**

The Sourcewise RFP Evaluation Committee evaluates the proposals based on the criteria outlined in the Request for Proposal and submits recommendations to the Sourcewise Board of Directors. Members of the Evaluation Committee are comprised of Advisory Council members and Governing board members. They will evaluate all proposals to determine responsiveness to this Request for Proposal. The panel will recommend selection of a candidate bidder for final approval and negotiation of a contract. 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 17 - 20 of this document. Recommendations from the evaluation committee are based on the highest scores.

No single objective will constitute the basis for selection. 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 this time.

**Step 6 RFP Recommendation:**

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

**Step 7 Board of Directors Approval:**

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

**Step 8 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 entity to respond. Include all the following information:
  - The reason(s) for the adverse determination.
  - The evidence on which the adverse determination is based.
  - The effective date of the adverse determination.
  - The legal or contractual citation upon which the adverse determination is based.
  - A citation to, or copy of, the hearing process to be followed, including the entity's right to a hearing and the time period in which to request a hearing.
  - In addition, an AAA shall include in its final notice of adverse determination to an existing service provider or an applicant service provider a statement that all appeal procedures have been exhausted.

### Step 9 Deadline of Appeals:

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, on June 7, 2024 at 4 p.m.

### Step 10 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 12 Service Begins:

This is the date on which funded services begin and the date for beginning program monitoring and evaluation July 1, 2024.

## PART IV: 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: 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 services to minority persons in greatest economic & social need proportionate to the total population served. (7 points)
- Adequacy of plan to provide equitable service delivery aim to target vulnerable populations. (7 points)
- Comparison of program objectives and units of service to those specified in the RFP. (7 points)
- Adequacy of plan for the recruitment and use of volunteer and staff resources. (3points)
- Structure of bidder organization and staffing patterns of paid staff and volunteers and its potential impact on achievement of proposed objectives and serving target population. (5 points)
- Adequacy of training plan for staff and volunteers. (2 points)
- Capability of bidder process to work with and encourage client input in program evaluation. (4 points)
- Demonstration of appropriate bidder linkage and coordination with local community organizations and resources to increase cost effectiveness and reduce duplication of service. (4 points)
- Adequacy of bidder plan to solicit and collect client contributions. (4 points)

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

##### Targeting

Bidder must have established methods, other than use of means testing, to provide services to the populations listed below. Programs, services, and activities must be extremely specific and explicit about the communities they are attempting to address gaps in service delivery.

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

- Age 60+
- Disabled Adults
- Low Income (federal poverty)
- Minority
- Living Alone

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act outlined previously in this document.

### **Staffing & Volunteers**

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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

### **Coordination**

Bidder must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### **Public Information/Outreach**

Bidder must have planned information and outreach activities, including distribution of printed materials advertising the program.

### **Client Input**

Bidder 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.

### **Client Contribution**

Bidder must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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. (5 points)
- Experience of bidder in serving older persons particularly the target population. (5 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. (3 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. (3 points)
- Status as a minority provider. (1 points)

## 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 Older Americans Act (OAA) proposed request for 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 funds and program cost. (4 points)
- Comparison of total program costs with program objectives and units of service for geographic area to be served. Reference objectives above to allocate costs to successfully meet objectives. (4 points)
- The percentage of the bidder’s match and relativity of the match directly relate to the project and expansion activities being proposed. (3 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 amount of Older Americans Act funds, other sources of cash, anticipated program income 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. **Older Americans Act Funds Requested:** This column reflects the actual Title III amount from Sourcewise. The total of this column must equal the amount of funding provided for the program as specified in the Program Standards section.
2. **Non-Match Cash:** Local cash contributions that do not qualify as matching contributions and/or is not being budgeted as matching contribution. Examples would be other, non-Sourcewise federal funding.
3. **Non-Match In-Kind:** The value of non-cash contributions that do not qualify as matching contributions and/or is not being budgeted as matching contributions.
4. **Cash Match:** Non-Federal cash received by the agency and used to fulfill the local match requirement.



**Example of Non-Federal Matching Sources:**

- a. Revenues from City, County, and State sources.
  - b. Revenues from private organizations.
  - c. Individual contributions are not tied to receiving service.
  - d. United Way revenues.
  - e. Revenue sharing.
5. **In-Kind Match:** Equivalent value of donated or volunteer services, supplies, etc. from nonfederal third-party sources and used to fulfill the local match requirement. It may also include the value of agency owned property utilized in the program.
6. **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 related to that program and shall be spent before Sourcewise funds are applied. It cannot be used to meet the local match requirement.

7. **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 Appendix A.

**Part D: Supporting Documentation (9 points)**

**I. Include the following:**

- Organizational Chart: Attach a copy of the bidder'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 Public Health Workforce funds described in the budget (1 point)
- Board of Directors roster (1 point)
- Bond & Insurance certification information including fidelity bond, general liability, private vehicle insurance, project vehicle insurance and worker's compensation insurance. (1 point)
- Documentation of Emergency plan that can be activated in an emergency. (1 point)
  - (1) The plan should include assurances that the facility is prepared and that the staff, volunteers, and participants have been trained in emergency planning and in fire safety.
- Submit the bidders' written grievance process for reviewing and attempting to resolve complaints of older individuals. (1 point)

- Transition Plan:
  - (1) 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 point)
  - (1) Describe how additional funds would be used if additional funds became available.
  - (2) Describe how services would be reduced due to a reduction of funds.

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

## IV. TERMS AND CONDITIONS

### A. Certification

By submitting a proposal, the 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 Judy Nguyen, [jnguyen@mysourcewise.com](mailto:jnguyen@mysourcewise.com) no later than 3:00 pm on Friday, May 3, 2024. 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, its officials, its officers, its employees and agents harmless 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 for any reason.

## 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 x miles x cents x 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. 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 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. 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.

**115 Subcontract:** This category is for subcontractor costs. Service performs by a third party.

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



## TITLE III B ADULT DAY CARE/HEALTH PROGRAM STANDARDS

**Program Goal:** The OAA Title III B Supportive Services Program provides a variety of services to address functional limitations, maintain health and independence, and promote access to services. Through this award, Sourcewise will support three licensed adult day care centers with the cost of serving individuals 60 years of age and older, in order to maintain their optimal capacity for self-care and enable them to continue to live in their community rather than being placed in a long-term care institution.

**Service Definition:** Personal care for dependent elders in a supervised, protective and congregate setting during some portion of a day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, and services such as rehabilitations, medications assistance, and home health aide services for adult day health.

**Service Type:** Registered Service

**Unit of Service:** 1 hour = 1 hour of service

### Scope of Service & Funding

Funding available: \$105,000

Minimum funding request: \$105,000

### Minimum Service Standard:

Units of Service: 11,250

Unduplicated Persons Served: 80

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

**Area to be Served:** Santa Clara County, with an emphasis on services targeted for individuals with Alzheimer's Disease, dementia, or other related disorders with neurological and organic brain dysfunction.

**Service Area Target Population:** Required to provide services to all persons aged 60 and over.

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.

### Adult Day Care/Health

#### Program Specific Scope of Service:

1. Adult Day Care Centers shall be licensed by the State of California, Health and Welfare Agency, Department of Social Services and shall abide by the Manual of Policies and Procedure issued by the Department.





2. Provider shall develop and maintain an individualized care plan for each participant and include the following components:
  - i. Scheduled days of attendance;
  - ii. Health history, diet requirements, and emergency procedures preferred by participant’s physician;
  - iii. Prescribed medication and frequency of admission;
  - iv. Participant objectives and therapeutic goals;
  - v. Individual activity plan, including group activities;
  - vi. A plan for transportation needs; and
  - vii. Discharge planning, if appropriate.
3. Provider shall monitor participants for changes in physical, mental, emotional, and social functioning which reveal unmet needs, or reveal a change in the level of services, specialized services, discharge, or a transfer to another type of facility. Such changes shall be documented and recorded as an ongoing assessment activity.
4. A meal shall be served to each participant who is in the center for four hours or more, and special equipment shall be provided for self-help with eating when necessary.
5. 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.
6. **Objectives:** The provider is required to demonstrate that each of the following program areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Service providers must have established methods, other than use of means testing, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

#### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

#### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

### 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.

### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

### Reporting Requirements:

As a “registered service,” detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information including: Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Name
- Birthdate
- Zip Code
- Rural Status
- Veteran Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- ADLs / IADLs Assessment
- Nutrition Risk assessment



## TITLE III B: CASE MANAGEMENT PROGRAM STANDARDS

**Program Definition & Goal:** Provide case management services for older adults residents of Santa Clara County which includes a comprehensive assessment of a frail older adult's needs to ensure access to vital services in the community allowing them to remain safely in their own home and avoid premature institutionalization.

**Service Type:** Registered Service

**Unit of Service:** 1 hour = 1 hour of service

### Scope of Service & Funding

Funding available: \$50,000

Minimum funding request: \$50,000

### Minimum Service Standard:

Units of Service: 3,200

Unduplicated Persons Served: 170

**Area to be Served:** Santa Clara County, northern county, emphasis on services targeted at low-income seniors and/or older individuals with limited English-speaking abilities

**Service Area Target Population:** Required to provide services to all persons aged 60 and over.

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.

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

### 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. Provider shall encourage coordination among case managers for sharing of resources, training activities, and referrals.
3. 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.
4. 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.
5. 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.
6. **Objectives:** The provider is required to demonstrate that each of the following program areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

### Targeting

Service providers must have established methods, other than use of means testing, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

### 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.

### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

### Reporting Requirements:

As a “registered service” detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- ADLs/IADLs Assessment
- Veteran Status



## TITLE III B: LEGAL ASSISTANCE PROGRAM STANDARDS

**Program Definition & Goal:** To provide accessible legal representation and consultation for older adults of the greatest social and economic need with an emphasize on but not limited to legal issues related to aging, abuse and neglect. Legal assistance consists of legal representation by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar.

**Service Type:** Non-registered Service

**Unit of Service:** 1 hour = 1 hour of service

**Area to be Served:** Santa Clara County

**Service Area Target Population:** Required to provide services to all persons aged 60 and over.

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

Funding available: \$220,000

Minimum funding request: \$220,000

### Minimum Service Standard:

Units of Service: 4,000 units of service

Unduplicated Persons Served: 856

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

### Legal Assistance

#### Program Specific Scope of Service:

1. Provider of county-wide services shall target the delivery of legal services at Sourcewise designated focal points and senior centers, with a priority emphasis on outreach in geographic areas with a high concentration of ethnic minority and low-income elderly. The remaining service effort may be delivered at other approved sites.
2. Provider shall set case priorities for categories of cases for which legal representation will be given to ensure that those in greatest economic (22 CCR § 7125) and social need (22 CCR § 7127) are served. Legal representation shall emphasize the categories of public benefits, long-term care, housing, alternatives to institutionalization, and elder abuse/neglect.





3. 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.
4. Provider shall present group training and education in areas of: rights, entitlements and benefits to older persons, their families and community representatives at service intake sites.
5. Provider shall ensure service quality and maintain professional standards by:
  - (a) Establishing a system of filing, record keeping, docket control and updating case activities;
  - (b) Providing for the supervision of legal workers by an attorney;
  - (c) Establishing a system of review to evaluate the quality of legal work, determine what pertinent issues have been identified, to assure the timely handling of cases, and to ensure that clients are involved in establishing case objectives and are kept informed of developments in the case.
  - (d) Setting optimum caseloads for legal workers based on their experience and specialization;
  - (e) Providing training for legal workers based on responsibilities and skills; and
  - (f) Ensuring that the confidences of clients are preserved from unauthorized disclosure
  - (g) Provider shall have legal malpractice insurance.
6. Legal services shall be delivered to institutionalized, isolated and homebound elderly.
7. A formal agreement shall be developed with the local state-designated Long-Term Care Ombudsman program that will specify ways in which the two programs will coordinate advocacy efforts.
8. A formal agreement shall be developed with the Health Insurance Counseling & Advocacy Program

Legal assistance provider(s) shall attempt to involve the private bar in legal assistance activities, including groups within the private bar furnishing services to older individuals on a pro bono or reduced fee basis.

9. **Objectives:** The provider is required to demonstrate that each of the following program areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

#### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

#### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

#### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

#### 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.

#### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

#### Reporting Requirements:

As a “non-registered” service, programs are required to collect information on name, zip code, and age in order to establish OAA program eligibility. Requirements include reporting estimated enrollment of clients/audience and service units on a quarterly and annual basis. Sourcewise will administer the California State Services Quarterly Aggregate Report CDA 1022 templates upon award.



## TITLE III B & TITLE VII LONG-TERM CARE OMBUDSMAN SERVICES PROGRAM STANDARDS

**Program Goal:** The Long-term Care (LTC) Ombudsman Program provides residents of LTC facilities with access to Ombudsman representatives who will advocate for their quality of care and quality of life. Ombudsman representatives strive to maintain a presence in the LTC facilities so that residents can build a relationship of trust with Ombudsman representatives and receive regular and timely access to Ombudsman services.

### Program Definitions:

**LTC Ombudsman:** The program aims to identify, investigate, and resolve complaints made by or on behalf of residents of long-term care (LTC) facilities that impact the residents' health, safety, welfare or rights. The Program also receives and investigates reports of suspected elder and dependent adult abuse occurring in various types of LTC facilities, including residential care facilities (also known as board and care homes and assisted living facilities) and skilled nursing facilities. Local staff and volunteers witness advance health care directives and certain property transfers for residents in nursing facilities to ensure these transactions are entered with-out undue influence. The Program also provides community education to inform the public about LTC services and issues that affect residents.

**Elder Abuse Prevention Programs:** activities to develop, strengthen, and carry out programs for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).

### Funding Type available:

1. **Title III B LTC Ombudsman**
2. **Title VII A LTC Ombudsman (*Vulnerable Elder Rights Protection Activities*)**
3. **LTC Ombudsman (*combines funding from: State Health Facilities Citation Penalties Account, General Fund, Public Health Licensing and Certification Program Fund*)**

**Service Type:** Non-registered service or special reporting

**Area to be Served:** Santa Clara County

**Service Area Target Population:** All residents of LTC Facilities, regardless of age

### Scope of Service & Funding

1. **Title III B Long Term Care Ombudsman Services: \$334,163**
2. **Long Term Care Ombudsman: \$132,398**
3. **Title VII-A Ombudsman Program (*Vulnerable Elder Rights Protection Activities*): \$67,230**



### Minimum Service Standard:

1. **Title III B Long Term Care Ombudsman Services:** Complaint investigation 193, Facilities visits 92
2. **Long Term Care Ombudsman:** Complaint investigation 431, Facilities visits 185
3. **Title VII-A Ombudsman Program (*Vulnerable Elder Rights Protection Activities*):** Complaint investigation 211, Facilities visits 94

### Unit of Service(s):

- 1 facility visit = 1 unit of service
- 1 complaint investigation = 1 unit of service
- 1 contact = 1 unit of service

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds for Title III B Services.

Title VII Ombudsman and LTC Ombudsman do not have match requirement.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website:

<https://www.mysourcewise.com/about/grantees/>

### LTC Ombudsman Service

#### Program Specific Scope of Service:

1. Sourcewise will ensure that the Local Ombudsman Program is in accordance with policies and procedures established by the Office of the State Long-term Care Ombudsman, will:
  - a. Provide services to protect the health, safety, welfare and rights of residents.
  - b. Ensure residents in the service area of the Local Ombudsman Program have regular, timely access to State Certified Ombudsman Representatives and timely responses to complaints and requests for assistance.
  - c. Identify, investigate, and seek to resolve complaints made by or on behalf of residents that relate to action, inaction, or decisions, that may adversely affect the health, safety, welfare, or rights of the residents. Complaint investigations shall be done in an objective manner to ascertain the pertinent facts. Findings shall be reported to the complainant. If a complaint is not investigated; the complainant shall be notified in writing of the decision not to investigate and the reasons for the decision.
  - d. Identify, investigate, and seek to resolve complaints made by or on behalf of residents with limited or no decision-making capacity and who have no legal

representative. If such a resident is unable to communicate consent to the Ombudsman representative, the Ombudsman representative shall seek evidence to indicate what outcome the resident would have communicated. In absence of evidence to the contrary, the Ombudsman representative shall assume that the resident wishes to have the resident's health, safety, welfare, and rights protected and work to accomplish that outcome.

- e. Receive and investigate reports of suspected abuse, neglect and exploitation of elder or dependent adults occurring in long-term care facilities as defined in Welf. & Inst. Code § 15610.47.
  - f. Witness advance health care directives and property transfers of more than \$100 for residents of skilled nursing facilities.
  - g. Collect and submit data in accordance with the statewide uniform reporting system established by the State Ombudsman and the reporting provisions specified by Sourcewise.
  - h. Represent the interests of residents before governmental agencies and seek administrative, legal, and other remedies to protect the health, safety, welfare, rights and well-being of residents.
  - i. Review, comment, and facilitate the ability of the public to comment on laws, regulations, policies, actions, and legislative bills that pertain to the rights and well-being of residents.
  - j. Support, actively encourage, and assist in the development of resident and family councils.
2. Carry out other activities that the State Ombudsman determines to be appropriate, including the following services:
    - a. Update, annually, a plan for maintaining an ongoing presence in long-term care facilities.
    - b. Provide public information and technical support pertaining to long-term care services, including inspection reports, statements of deficiency, and plans of correction for long-term care facilities within Santa Clara County.
    - c. Present community education and training programs to long-term care facility staff, human service workers, families and the general public about long-term care and residents' rights.
    - d. Refer other individuals' complaints and concerns that a representative becomes aware are occurring in the facility to the appropriate governmental agency.
  3. Paid staff and volunteer ombudsman representatives of the local ombudsman program will be individually certified by the State Ombudsman to serve as representatives of the State Long-Term Care Ombudsman Program.
  4. The service provider shall ensure that the Elder Abuse Prevention program shall do some or all of the following:
    - a. Provide for public education and outreach to identify and prevent elder abuse, neglect, and exploitation;

- b. Provide for public education and outreach to promote financial literacy and prevent identity theft and financial exploitation of older individuals;
  - c. Ensure the coordination of services provided by AAAs with services instituted under the State adult protective service program, State and local law enforcement systems, and courts of competent jurisdiction;
  - d. Promote the development of information and data systems, including elder abuse reporting systems, to quantify the extent of elder abuse, neglect, and exploitation in the PSA;
  - e. Conduct analyses of local Adult Protective Services and Long-Term Care Ombudsman information concerning elder abuse, neglect, and exploitation and identifying unmet service, enforcement, or intervention needs;
  - f. Conduct training for individuals, including caregivers, professionals, and paraprofessionals, in relevant fields on the identification, prevention, and treatment of elder abuse, neglect, and exploitation, with particular focus on prevention and enhancement of self determination and autonomy.
5. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

### Targeting

Service providers must have established methods, other than use of means testing, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

#### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

#### 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.

#### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

#### Reporting Requirements:

Service provider is required to use the National Ombudsman Reporting System (NORS).

As a “non-registered” service, requirements include reporting estimated enrollment of clients/audience and service units on a quarterly and annual basis. Upon award the required OSLTCO reporting templates will be provided by Sourcewise.





## TITLE III C: CONGREGATE NUTRITION PROGRAM STANDARDS

**Program Goal:** Assist older individuals in California to live independently, by promoting better health through improved nutrition, and reduced isolation through programs coordinated with nutrition-related supportive service. Aims to ensure older adults remain independent in their communities.

To reduce hunger and food insecurity, promote socialization of older individuals, and increase health and well-being of older individuals by assisting such individuals to gain access to nutrition and other disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

**Service Definition:** A meal provided to an eligible individual in a congregate group setting, that meets all of the requirements of the Older Americans Act and State/Local laws, and assures a minimum one-third of the Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Meals must also meet the Nutrition Services Incentive Program (NSIP) requirements.

Alternative accommodation of meal consumption can be offered to congregate meals participant in the form of To-Go Meals. The intent of the To-Go Meals is to enable flexibility for the participants to consume the meal.

Types of To-Go Meals consumption:

1. Consume at home while congregating, in-person or virtual interaction. This is a Congregate Meal service, Title III-C1. Applicants must provide estimated number of To-Go Meals, number of individuals served, number of unduplicated individuals served, and costs in the Older Americans Act application and budget if this type of To-Go Meals will be proposed by the Title III-C1 Congregate Meal applicant in conjunction with traditional Congregate Meals. The funding stated below will also be used towards this service delivery, 20% funding is allowable.
2. Consume at home without congregating, no in-person or virtual interaction. This is a Home Delivered Meal, Title III-C2 service. This type of to-go meal must be reported as C2 meal and unduplicated C2 client. Applicants must provide estimated number of To-Go Meals, number of individuals served, number of unduplicated individuals served, and costs in the Older Americans Act application and budget if this type of To-Go Meals will be proposed by the Title III-C1 Congregate Meal applicant in conjunction with traditional Congregate Meals. Funding is contingent upon the estimated number of To-Go Meals, number of individuals, and costs.

For information related to the To-Go Meals, please refer to "Is It a Congregate or Home-Delivered Meal" flow chart.

If the above types of To-Go Meals consumption will be provided for the Congregate Meals program, applicants must submit a Congregate Meals program policy to the AAA for review and approval.

**Service Type:** Registered Service

**Unit of Service:** 1 meal = 1 unit of service



## Scope of Service & Funding

Funding available: \$1,829,755 (congregate meals delivery service)

## Minimum Service Standard:

Units of Service: 581,926 (congregate meals delivery service)

Unduplicated Persons Served: 12,073 (congregate meals delivery service)

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

**Area to be Served:** Santa Clara County

**Service Area Target Population:** Required to provide services to all persons aged 60 and over.

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.

## Congregate Meal

### Program Specific Scope of Service:

1. Provide a hot or otherwise appropriate meal 5 or more days a week (unless such service is not feasible), and any additional meals which the recipient of a contract may elect to provide.
2. The meals must comply with the Dietary Guidelines for Americans published by the Secretary of HHS and the Secretary of Agriculture. Providers must serve meals that meet certain dietary requirements based on the number of meals served by the project each day. Providers that serve one meal per day must provide to each participant a minimum of one-third of the daily recommended dietary reference intakes (DRIs) established by the Food and Nutrition Board of the National Academy of Sciences.
3. Provide the meals in a congregate setting, including adult day care facilities and multigenerational meal sites.
4. Provide nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of meal participants.
5. Comply with the CRFC and the local health department regarding safe and sanitary preparation and service of meals.
6. Comply with the Division of Occupational Safety and Health (Cal/OSHA), California Department of Industrial Relations requirements regarding staff and participant safety.
7. At a minimum, perform quarterly monitoring for safe food handling and sanitation practices of food facilities.
8. Have a manager on staff to conduct the day-to-day management and administrative functions of the program, and have one of the following:
  - a. An associate degree in institutional food service management, plus 2 years of experience as a food service supervisor, or,

- b. Demonstrate experience in food service, and within 12 months of hire successfully complete a minimum of 20 hours specifically related to food service management, business administration, or personnel management, or,
  - c. Two years' experience managing food services.
9. All staff, paid and volunteer, shall receive a minimum of 4 annual hours of training to perform their assigned responsibilities, including at a minimum:
  - a. Food safety, prevention of foodborne illness, and HACCP principles.
  - b. Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
10. Each congregate meal provider shall:
  - a. Include procedure for obtaining the views of participants about the services received.
  - b. Not preclude the services of a meal to a participant who has failed to make a reservation when food is available.
11. Each congregate meal site shall meet all of the following:
  - a. Have a paid staff or volunteer designated to be responsible for the day-to-day activities at each site, and physically be on-site during the time of the congregate meal program when taking place.
  - b. Have restrooms, lighting and ventilation which meets the requirements of the CURFFL.
  - c. Have equipment, including tables and chairs, that is sturdy and appropriate for older individuals. Tables shall be arranged to assure ease of access and encourage socialization.
12. An eligible individual who receives a meal shall be given the opportunity to contribute to the cost of the meal. The provider shall develop a suggested contribution, considering the income ranges of older adults in the community. No eligible individual shall be denied participation because of failure or inability to contribute. In addition:
  - a. A sign indicating the suggested contribution for eligible individuals, and the fees for guest, shall be posted near the contribution container at each congregate meal site. A guest fee shall cover all meal costs.
  - b. The provider shall ensure that the amount of the eligible participants contribution is kept confidential.
  - c. Upon award of the contract, the provider shall establish written procedure to protect contributions and fees from loss, mishandling and theft. Such procedures shall be kept on file at the providers site.
  - d. All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.
13. Provide, at a minimum, 4 nutrition education sessions annually. Nutrition education is defined as demonstrations, presentations, lectures, or small group discussions. A registered dietitian shall provide input and approve the content of nutrition education prior to the presentation.
14. Provide meals to the following eligible populations, including older individuals age 60 and older:
  - a. The spouse of any older individual
  - b. A person with a disability under age 60 who resides in a housing facility primarily occupied by older individuals at which congregate nutrition services are provided.
  - c. A person with a disability who resides at home with and accompanies an older individual who participates in the program.
15. Provide meals to eligible volunteers:
  - a. A volunteer under age 60 may be offered a meal if doing so will not deprive an older individual of a meal.

b. A written policy for providing and accounting for volunteer meals shall be developed and implemented.

16. The program encourages the use of volunteers.

17. 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.

18. **Objectives:** The provider is required to demonstrate that each of the following program's areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

#### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

#### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

#### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

#### 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.

#### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

#### Reporting Requirements:

As a “registered service.” Detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

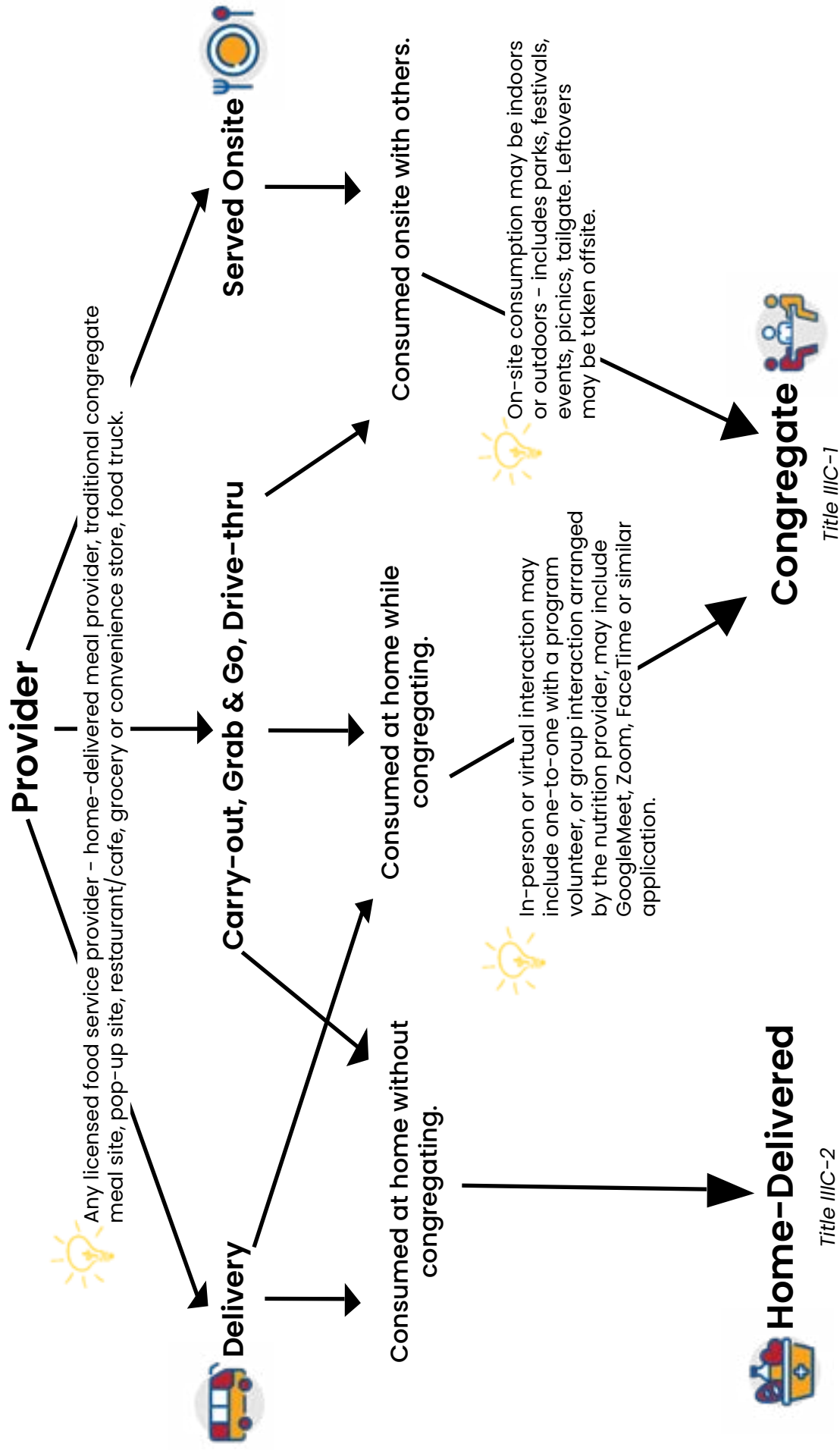
Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Nutrition Risk assessment
- Veteran Status

# Is It a Congregate or Home-Delivered Meal?

Classifying a service as Congregate (Title III C-1) or Home-Delivered (Title III C-2) will impact reporting and data collection, as well as identifying funding sources for contract and grants. States, Area Agencies on Aging and local service providers may need to review and/or update policies and procedures to ensure accurate tracking of consumer participation in provider-arranged interaction described below.





## TITLE III C: HOME DELIVERED MEAL NUTRITION PROGRAM STANDARDS

**Program Goal:** Assist older individuals in California to live independently, by promoting better health through improved nutrition, and reduced isolation through programs coordinated with nutrition-related supportive service. Aims to ensure older adults remain independent in their communities.

To reduce hunger and food insecurity and increase health and well-being of older individuals by assisting such individuals to gain access to nutrition to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

**Service Definition:** A meal provided to an eligible individual in his or her place of residence, that meets all of the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Meals must also meet the Nutrition Services Incentive Program (NSIP) requirements.

**Service Type:** Registered Service

**Unit of Service:** 1 meal = 1 unit of service

### Scope of Service & Funding

Funding available: \$250,000

Minimum funding request: \$250,000

### Service Standard:

Meal Type: Hot or Fresh meals

Units of Service: 44,720

Unduplicated Persons Served: 208

**Required Match:** The minimum cash or in-kind match is 11.11% of requested funds.

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

**Area to be Served:** Santa Clara County

**Service Area Target Population:** Provide services to all persons aged 60 and over.

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.





## Home Delivered Meal

### Program Specific Scope of Service:

1. Meal must comply with the most recent Dietary Guidelines for Americans, including at minimum of one-third (1/3) of the in the Dietary Reference Intakes (DRIs) by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences (2006), which are incorporated by reference.
2. Provide nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of meal participants.
3. Comply with the CRFC and the local health department regarding safe and sanitary preparation and service of meals.
4. Comply with the Division of Occupational Safety and Health (Cal/OSHA), California Department of Industrial Relations requirements regarding staff and participant safety.
5. At a minimum, perform quarterly monitoring for safe food handling and sanitation practices of food facilities.
6. Have a manager on staff to conduct the day-to-day management and administrative functions of the program, and have one of the following:
  - a. An associate degree in institutional food service management, plus 2 years of experience as a food service supervisor, or,
  - b. Demonstrate experience in food service, and within 12 months of hire successfully complete a minimum of 20 hours specifically related to food service management, business administration, or personnel management, or,
  - c. Two years' experience managing food services.
7. All staff, paid and volunteer, shall receive a minimum of 4 annual hours of training to perform their assigned responsibilities, including at a minimum:
  - a. Food safety, prevention of foodborne illness, and HACCP principles.
  - b. Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
8. Each home-delivered meal provider shall:
  - a. Develop and implement criteria to assess the level of need for home-delivered nutrition services of each eligible participant.
    - i. Initial determination of eligibility may be done by phone
    - ii. Complete a written assessment 2 weeks prior to the start of meal serves and shall include an assessment of the type of meals appropriate for the participant in their home environment.
    - iii. Reassessment of need shall be determined quarterly. Such reassessment shall be done in the home of the participant at least every other quarter. Two times a year.
  - b. Provide instructions in the language of the majority of the participants for handling and re-heating the meals.
  - c. The provider will develop a waiting list for home-delivered meals whenever the home delivered meals provider is unable to provide meals to eligible individuals. The decision to place eligible recipients of a home-delivered meal on a waiting list, and their position on such a list, shall be based on greatest need and/or in accordance with policy established by the home-delivered meal provider, in consultation with Sourcewise.

9. An eligible individual who receives a meal shall be given the opportunity to contribute to the cost of the meal. The provider shall develop a suggested contribution, considering the income ranges of older adults in the community. No eligible individual shall be denied participation because of failure or inability to contribute. In addition:
  - a. A sign indicating the suggested contribution for eligible individuals, and the fees for guest, shall be posted near the contribution container at each congregate meal site. A guest fee shall cover all meal costs.
  - b. The provider shall ensure that the amount of the eligible participants contribution is kept confidential.
  - c. Upon award of the contract, the provider shall establish written procedure to protect contributions and fees from loss, mishandling and theft. Such procedures shall be kept on file at the providers site.
  - d. All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.
10. Provide, at a minimum, 4 nutrition education sessions annually. Nutrition education is defined as demonstrations, presentations, lectures, or small group discussions. A registered dietitian shall provide input and approve the content of nutrition education prior to the presentation. Upon award the requirements on administering the trainings will be included.
11. The program encourages the use of volunteers. Volunteers shall be recruited and used in any phase of program operations where qualified.
12. 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.
13. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

#### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

### 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.

### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

### Reporting Requirements:

As a “registered service.” Detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Nutrition Risk assessment
- Veteran Status

## TITLE III D: DISEASE PREVENTION & HEALTH PROMOTION PROGRAM STANDARDS

**Program Goal:** To promote the health and well-being of older individuals by assisting such individuals to gain access to disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

**Service Definition:** Provide health risk assessments; routine health screening; nutrition counseling/education services; evidence-based health promotion; physical fitness, group exercise, music, art therapy, dance movement and programs for multigenerational participation; home injury control services; screening for the prevention of depression and coordination of other mental health services; medication management screening and education; gerontological and social service counseling; and education on preventative health services.

Primary activities are normally on a one-to-one basis; if done as a group activity, each participant shall be counted as one contact unit.

**Service Type:** Non-registered Service

**Unit of Service:** 1 contact = 1 unit of service

### Scope of Service & Funding

Funding available: \$126,127

The maximum grant amount is \$63,064

### Minimum Service Standard:

Units of Service: 2,300 contacts

Unduplicated Persons Served: 114 unduplicated persons

**Area to be Served, contract 1:** Santa Clara County

**Area to be Served, contract 2:** Santa Clara County, targeted to vulnerable populations including minorities in a geographically isolated or rural area

**Service Area Target Population:** Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

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

**Required Match:** Not applicable

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>



## Disease Prevention & Health Promotion

### Program Specific Scope of Service:

1. Provider shall target the delivery of Disease Prevention & Health Promotion evidence based approved programs as described in [‘Highest Tier Evidence-Based Health Promotion/Disease Prevention Program’](#) at Sourcewise designated focal points and senior centers, with a priority emphasis on outreach in geographic areas with a high concentration of ethnic minority and low-income elderly.

The remaining service effort may be delivered at other approved sites.

2. Provider shall present one-on-one and/or group trainings inclusive of education in the areas of:
  - i. Illness prevention
  - ii. Manage chronic physical conditions
  - iii. Promote healthy and independent living
  - iv. Improve older adults quality of life
3. Applicant will comply with standards outlined in the Program Memo dated 7/29/2015 from the California Department of Aging ([Appendix A](#))
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 and coordinate community resources and linkages for participants are required.
5. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

### Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

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

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

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

### Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

### 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.

### Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

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.

### Reporting Requirements:

As a “non-registered” service. Programs are required to collect information on name, zip code, and age in order to establish OAA program eligibility. Requirements include reporting estimated enrollment of clients/audience and service units on a quarterly and annual basis. Sourcewise will administer templates to submit reports and submit request of funds upon award.

# APPENDIX A: TITLE III D PROGRAM MEMO 15-10 (2015)

**CALIFORNIA DEPARTMENT OF AGING**

1300 NATIONAL DRIVE, SUITE 200  
 SACRAMENTO, CA 95834-1992  
 Internet Home Page: [www.aging.ca.gov](http://www.aging.ca.gov)  
 TDD Only 1 (800) 735-2929  
 FAX Only (916) 928-2267  
 Phone Number (916) 419-7500



## PROGRAM MEMO

CDA 1014 (Rev. 02/14)

TO: <b>Area Agency on Aging Directors</b>		NO.: <b>PM 15- 10 (P)</b>
SUBJECT: <b>Updated Title IIID Disease Prevention and Health Promotion Program Requirements Effective July 1, 2016</b>		DATE ISSUED: <b>July 29 , 2015</b>
		EXPIRES: <b>When superseded</b>
REFERENCES: <b>FY 2012 Congressional Appropriations</b>		SUPERSEDES: <b>PM 12-10 (P)</b>
PROGRAMS AFFECTED:	<input type="checkbox"/> All <input type="checkbox"/> Title III-B <input type="checkbox"/> Title III-C1/C2 <input checked="" type="checkbox"/> Title III-D <input type="checkbox"/> Title III-E <input type="checkbox"/> Title VII <input type="checkbox"/> Title V <input type="checkbox"/> HICAP <input type="checkbox"/> Other:	

**Purpose**                      The purpose of this Program Memo (PM) is to provide guidance to Area Agencies on Aging (AAA) on the new federal requirements for evidence-based Title IIID Disease Prevention and Health Promotion Programs (Title IIID), which go into effect July 1, 2016.

**Background**                The Federal Fiscal Year (FFY) 2012 Congressional appropriations law required that by FFY 2016 Older Americans Act (OAA) Title IIID funding be used only for Disease Prevention and Health Promotion programs and activities which have been demonstrated through rigorous evaluation to be evidence-based.

To guide states and AAAs in phasing in these new requirements, the Administration for Community Living (ACL) established a three-tiered set of criteria for defining OAA evidence-based interventions.

On June 4, 2014, ACL announced that this three-tiered set of criteria would no longer apply after September 30, 2016. Effective October 1, 2016, Title IIID funds shall be used only for health promotion programs and activities that meet the highest level evidence-based criteria. ACL encouraged states to work in collaboration with their AAAs to establish a target date for complying with this new standard in advance of the October 1, 2016 effective date.

In consultation with AAAs, the Department established July 1, 2016, as California's implementation date for the new evidence-based standard. This effective date aligns with the State Fiscal Year (SFY), CDA Standard Agreement contract period, and the Area Plan cycle.

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**Implementing Approved DHHS Programs**

AAAs may use the Title IIID funding to support any evidence-based program(s) that have been approved by the U.S. Department of Health and Human Services (DHHS). Included below are links to the DHHS-approved evidence-based programs.

- Administration on Community Living's, Aging and Disability Evidence-Based Programs and Practices.  
<http://www.acl.gov/Programs/CIP/OCASD/ADEPP/index.aspx>
- Center for Disease Control and Prevention's (CDC), Compendium of Effective Interventions.  
<http://www.cdc.gov/homeandrecreationalafety/Falls/compendium.html>
- Substance Abuse and Mental Health Services Administration's (SAMHSA), National Registry of Evidence-Based Programs and Practices.  
<http://www.nrepp.samhsa.gov/>
- NIH's Cancer Control Evidence-Based Portal, Research-tested Intervention programs.  
<http://rtips.cancer.gov/rtips/index.do>

**Implementing Programs Not Approved by DHHS**

If AAAs want to use Title IIID funds to support other programs, they must meet all of the five (5) criteria below:

- Have demonstrated through evaluation that they are effective for improving the health and well-being or reducing the disability and/or injury among older adults.
- Have been proven effective with the older adult population, having used an Experimental or Quasi-Experimental Design.
- Have research/evaluation results that have been published in a peer-reviewed journal.
- Have been implemented previously at the community level (with fidelity to the published research) and shown to be effective outside a research setting.
- Includes program manuals, guides, and/or handouts that are available to the public.

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**Implementation Process**

Effective July 1, 2016, Title IIID funds shall only be used for health promotion programs that comply with ACL's new evidence-based program standards.

Currently some AAAs fund Nutrition Education and Nutrition Counseling programs. These activities will not meet ACL's new standard for Title IIID evidence-based programs. AAAs may continue to fund Medication Management. However, the program must comply with ACL's new Title IIID evidence-based standards.

Contracts

By July 1, 2016, AAAs must ensure that Title IIID funded program activities comply with ACL's new Title IIID evidence-based program standards.

All Requests for Proposals (RFP) and subcontracts for SFY 2016-17 and beyond must include the new evidence-based definitions.

Area Plan

The following sections of the AAA's SFY 2016-17 Area Plan must reflect that all planned Title IIID activities meet ACL's new evidence-based standard.

- Section 9 Area Plan Narrative Goals and Objectives: The objective(s) shall clearly describe the service activity being performed and explain how the service activity meets ACL's standard for evidence-based programs.
- Section 10 Area Plan Service Unit Plan Objectives: AAAs shall enter proposed units of service and Program Goal and Objective numbers, which link to the written program description in Section 9 of the Area Plan.

Fiscal

Report the SFY 2016-17 funding amount for all Title IIID activities including Medication Management on the Disease Prevention Health Promotion (DHP) line of the Area Plan Budget. AAAs will not be able to enter Title IIID funds on the Nutrition Counseling and Nutrition Education lines of the budget since these programs will no longer be allowable activities under Title IIID.

Data

Report all SFY 2016-17 Title IIID activities under the Health Promotion service category.

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**Resources**

The following links provide additional information on implementing Title IIID evidence-based programs.

- ACL Title IIID evidence-based criteria and program examples:  
[http://www.aoa.acl.gov/AoA\\_Programs/HPW/Title\\_IIID/index.aspx](http://www.aoa.acl.gov/AoA_Programs/HPW/Title_IIID/index.aspx)
- Summary of Evidence-Based Health Promotion Programs Being Offered by California Area Agencies on Aging:

The California Department of Aging developed a matrix of Evidence-Based Health Promotion and Caregiver Support Programs used by home and community based organizations and health care providers in California. This matrix is meant to assist Area Agencies on Aging in analyzing the implementation for these evidence-based health programs. All programs on the matrix meet the evidence-based Title IIID requirements.

[http://www.aging.ca.gov/ProgramsProviders/AAA/Disease\\_Prevention\\_and\\_Health\\_Promotion/](http://www.aging.ca.gov/ProgramsProviders/AAA/Disease_Prevention_and_Health_Promotion/)

- Highest Tier Evidence-Based Health Promotion/Disease Prevention Programs. This chart is available on the National Council on Aging (NCOA) website. The chart outlines thirty programs that have undergone the Administration on Aging's Older Americans Act Title IIID evidence-based program submission process.

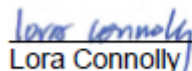
<https://www.ncoa.org/resources/highest-tier-evidence-based-health-promotion-disease-prevention-programs/>

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**Inquiries**

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Andrea Bricker at (916) 928-3324 or [adrea.bricker@aging.ca.gov](mailto:adrea.bricker@aging.ca.gov).

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Lora Connolly  
Director



## TITLE III E FCSP CAREGIVER TRAINING PROGRAM STANDARDS

**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, Caregiver Training:** An FCSP support service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and shall address the areas of health, nutrition, and financial literacy.

**OAA Service Type:** Title III E FCSP Caregiver Training (Caring for Elderly), Support Service

**Service Type:** Registered Service

**Area to be Served, contract 1:** Santa Clara County

**Area to be Served, contract 2:** Targeting geographic region of Santa Clara County, identifying targeted vulnerable population including but not limited to LGBTQ+ Caregivers, African American/Black Caregivers, Asian American, and/or Hispanic/Latinx Caregiver population.

**Service Area Target Population:** 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.

**Baseline Older American Act, Title III E Funding:**

**Funding available\*:** \$52,400

**Minimum funding request:** \$52,400

**Required Match:** The minimum cash or in-kind match is 35% of requested funds.

**Service Standard:**

**Unit of Service:** 2,400

**Minimum Unduplicated Persons Goal:** 200\*\*

**Unit of Service Type:** 1 hour = 1 unit of service

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\* \*Funding is contingent upon the availability of state and federal funds. The allocation outlined above represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change.

\*\* Unduplicated persons goal can be renegotiated dependent on the quality of the service provided and to which geographic region including the identification of vulnerable communities served as it relates to the OAA greatest economic need (22 CCR § 7125) and greatest social need (22 CCR § 7127).

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

### *Family Caregiver Support Program, Caregiver Training*

#### Program Specific Scope of Service:

1. 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. Organization has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency preferences, caregiving abilities; 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.
3. Organization has experience providing individual counseling, support groups, and training to assist caregivers with health, nutrition, and financial literacy, and in making decisions and solving problems related to their caregiving roles.
4. The Title III E FCSP encourages the use of volunteers to further expand availability of services to target population in defined geographic region. Bidder has capacity and/or experience to recruit, train, and used volunteers in any phase of program operations where qualified.
5. 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.
6. **Objectives:** The service provider is required to demonstrate that each of the following program's areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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 to further expand the provision of the Title III E program.

### Coordination

Bidder shall form and administer cooperative agreements with other community-based agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication of services.

### Public Information/Outreach

Bidders must have planned information and outreach activities, including distribution printed materials co-branded with funding agency (Sourcewise) to promote services to target populations and geographic region 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

As a “registered service” detailed client information for the client is required to be collected and reported if the bidder plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise database program, to report on services and client characteristics. The bidder must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Service providers are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each caregiver and care recipient and entered to the Data Reporting Software, Q Continuum (“Q”):

#### Caregiver Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Employment Assessment
- Create a Caregiver Record
- Veteran Status

#### Care Recipient Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- ADLs/IADLs Assessment
- Caregiver/Care Recipient Relationship File
- Veteran Status





## TITLE III E FCSP COMMUNITY EDUCATION ON CAREGIVING PROGRAM STANDARDS

**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, Community Education on Caregiving (Caring for Elderly):** Service designed to education groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g. booth at a health fair).

**OAA Service Type:** Title III E FCSP Community Education on Caregiving (Caring for Elderly), Information Service

**Service Type:** Non-registered Service

**Area to be Served:** Santa Clara County or targeting specific geographic region within Santa Clara County

**Service Area Target Population:** 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:**

Funding available\*: \$48,600

Minimum funding request: \$48,600

**Required Match:** The minimum cash or in-kind match is 35% of requested funds.

**Service Standard:**

*Based on the maximum funding request*

Unit of Service: 250

Minimum Unduplicated Persons Goal: 1,500\*\*

**Unit of Service Type:** 1 activity = 1 unit of service

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

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\* \*Funding is contingent upon the availability of state and federal funds. The allocation outlined above represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change.

\*\* Unduplicated persons goal can be renegotiated dependent on the quality of the service provided and to which geographic region including the identification of vulnerable communities served as it relates to the OAA greatest economic need (22 CCR § 7125) and greatest social need (22 CCR § 7127).

Program Specific Scope of Service:

1. 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. Organization has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency preferences, caregiving abilities; 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.
3. The Title III E FCSP encourages the use of volunteers to further expand availability of services to target population in defined geographic region. Bidder has capacity and/or experience to recruit, train, and used volunteers in any phase of program operations where qualified.
4. 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.
5. **Objectives:** The service provider is required to demonstrate that each of the following program's areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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 to further expand the provision of the Title III E program.

### Coordination

Bidder shall form and administer cooperative agreements with other community-based agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication of services.

### Public Information/Outreach

Bidders must have planned information and outreach activities, including distribution printed materials co-branded with funding agency (Sourcewise) to promote services to target populations and geographic region 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

As a “non-registered” service, awarded bidders are required to collect information on name, zip code, and age to establish OAA program eligibility. Requirements include reporting estimated enrollment of clients/audience and units of service on a quarterly and annual basis. Quarterly reports and expenditures are due on the 10<sup>th</sup> day of the following month after the quarter to Sourcewise and templates for service unit reporting will be provided.



## TITLE III E FCSP GRANDPARENT CASE MANAGEMENT PROGRAM STANDARDS

**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 Grandparent Case Management (Caring for Child):** A services provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provisions of formal caregiver-related services in circumstances where caregivers are experiencing diminished capacities due to mental impairment or temporary severe stress and/or depression.

**OAA Service Type:** Title III E FCSP Case Management (Caring for Child), Support Service  
**Service Type:** Registered Service

**Area to be Served:** Santa Clara County or targeting specific geographic region in Santa Clara County

**Service Area Target Population:** Caregiver is a grandparent or step- grandparent of a child, or a relative of a child by blood or marriage, who is 55 years of age or older and:

- Lives with the child.
- Is the primary caregiver of the child because the biological or adoptive parents are unable or unwilling to serve as the primary caregiver; and
- Has a legal relationship to the child, has legal custody or guardianship; or is raising the child informally.

Care receiver should be a child age 18 or younger.

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. 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.

**Baseline Older American Act, Title III E Funding:**

**Funding available\*:** \$46,170

**Minimum funding request:** \$46,170

**Required Match:** The minimum cash or in-kind match is 35% of requested funds.

**Service Standard:**

Minimum Unit of Service: 600

Minimum Unduplicated Persons Goal: 150\*\*

**Unit of Service Type:** 1 hour = 1 unit of service

For additional budgeting requirements read the 2024-2025 Request for Proposal Bidders Guide available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

\*Funding is contingent upon the availability of state and federal funds. The allocation outlined above represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change.

\*\*Unduplicated persons goal can be renegotiated dependent on the quality of the service provided and to which geographic region including the identification of vulnerable communities served as it relates to the OAA greatest economic need (22 CCR § 7125) and greatest social need (22 CCR § 7127).



*Family Caregiver Support Program, Grandparent Case Management (Caring for Child)*  
Program Specific Scope of Service:

1. 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. Organization has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency preferences, caregiving abilities; 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.
3. Bidder shall encourage coordination amongst staff for sharing of resources, training activities, and referrals.
4. The following four activities can be recorded as 1 hour or unit of service:
  - a. **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.
  - b. **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.
  - c. **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.
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.
6. The Title III E FCSP encourages the use of volunteers to further expand availability of services to target population in defined geographic region. Bidder has capacity and/or experience to recruit, train, and used volunteers in any phase of program operations where qualified.
7. 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.
8. **Objectives:** The service provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

### Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Bidder must form and administer cooperative agreements with other agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution printed 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

As a “registered service” detailed client information for the client is required to be collected and reported if the bidder plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise

database program, to report on services and client characteristics. The bidder must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

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

The following required characteristics must be collected from each caregiver and care recipient and entered to the Data Reporting Software, Q Continuum (“Q”):

#### Caregiver Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Employment Assessment
- Create a Caregiver Record
- Veteran Status

#### Care Recipient Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Caregiver/Care Recipient Relationship File
- Veteran Status





## TITLE III E FCSP RESPITE IN-HOME PROGRAM STANDARDS

**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, Respite In-Home:** An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents.

**OAA Service Type:** Title III E FCSP Respite In-Home (Caring for Elderly), Respite Service  
**Service Type:** Registered Service

**Area to be Served:** Santa Clara County

**Service Area Target Population:** 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:**

Funding available\*: \$32,400

Minimum funding request: \$32,400

**Required Match:** The minimum cash or in-kind match is 35% of requested funds.

**Service Standard:**

Minimum Unit of Service: 2,000

Minimum Unduplicated Persons Goal: 30\*\*

**Unit of Service Type:** 1 hour = 1 unit of service

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

\*Funding is contingent upon the availability of state and federal funds. The allocation outlined above represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change.

\*\*Unduplicated persons goal can be renegotiated dependent on the quality of the service provided and to which geographic region including the identification of vulnerable communities served as it relates to the OAA greatest economic need (22 CCR § 7125) and greatest social need (22 CCR § 7127).



*Family Caregiver Support Program, Respite In-Home*  
Program Specific Scope of Service:

1. 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. Organization has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency preferences, caregiving abilities; 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.
3. Bidder has experience recruiting, screening, and maintaining a listing of dependable, qualified, self-employed homemaker or respite care workers who may be matched with caregivers.
4. The Title III E FCSP encourages the use of volunteers to further expand availability of services to target population in defined geographic region. Bidder has capacity and/or experience to recruit, train, and use volunteers in any phase of program operations where qualified.
5. 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.
4. **Objectives:** The service provider is required to demonstrate that each of the following program areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Bidder must form and administer cooperative agreements with other agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution printed 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

As a “registered service” detailed client information for the client is required to be collected and reported if the bidder plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise database program, to report on services and client characteristics. The bidder must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each caregiver and care recipient and entered to the Data Reporting Software, Q Continuum (“Q”):

Caregiver Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Gender
- Sex at Birth
- Sexual Orientation
- Zip Code
- Rural Status
- Poverty Status
- Living Status
- Employment Assessment
- Create a Caregiver Record
- Race
- Ethnicity
- Veteran Status

Care Recipient Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Gender
- Sex at Birth
- Sexual Orientation
- Zip Code
- Rural Status
- Poverty Status
- Living Status
- ADLs/IADLs Assessment
- Caregiver/Care Recipient Relationship File
- Race
- Ethnicity
- Veteran Status



## TITLE III E FCSP RESPITE OUT-OF-HOME DAY CARE PROGRAM STANDARDS

**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, Respite Out-of-Home Day Care:** An FCSP Respite Care service 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.

**OAA Service Type:** Title III E FCSP Respite Out-of-Home Day Care (Caring for Elderly)

**Service Type:** Registered Service

**Area to be Served, contract 1:** Santa Clara County

**Area to be Served, contract 2:** Southern region of Santa Clara County (specifically Gilroy, San Martin, and Morgan Hill)

**Service Area Target Population:** 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:**

Funding available\*: \$200,000

The maximum funding request is: \$100,000

**Required Match:** The minimum cash or in-kind match is 35% of requested funds.

**Service Standard:**

Minimum Unit of Service: 23,000

Minimum Unduplicated Persons Goal: 100\*\*

**Unit of Service Type:** 1 hour = 1 unit of service

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

\*Funding is contingent upon the availability of state and federal funds. The allocation outlined above represents a planning estimate provided by the California Department of Aging and/or Federal Government and is subject to change.

\*\*Unduplicated persons goal can be renegotiated dependent on the quality of the service provided and to which geographic region including the identification of vulnerable communities served as it relates to the OAA greatest economic need (22 CCR § 7125) and greatest social need (22 CCR § 7127).



*Family Caregiver Support Program, Respite Out-of-Home Day Care*  
Program Specific Scope of Service:

1. 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. Organization has experience conducting individual assessments that identify the caregiver's willingness to provide care; duration and care frequency preferences, caregiving abilities; 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.
3. The Title III E FCSP encourages the use of volunteers to further expand availability of services to target population in defined geographic region. Bidder has capacity and/or experience to recruit, train, and used volunteers in any phase of program operations where qualified.
4. 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.
5. **Objectives:** The service provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Bidder must form and administer cooperative agreements with other agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution printed 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

As a “registered service” detailed client information for the client is required to be collected and reported if the bidder plans on providing service in these areas. The agency is required to use Q Continuum (“Q”), Sourcewise database program, to report on services and client characteristics. The bidder must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.



The following required characteristics must be collected from each caregiver and care recipient and entered to the Data Reporting Software, Q Continuum (“Q”):

Caregiver Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Gender
- Sex at Birth
- Sexual Orientation
- Zip Code
- Rural Status
- Poverty Status
- Living Status
- Employment Assessment
- Create a Caregiver Record
- Veteran Status
- Race
- Ethnicity

Care Recipient Required Data Characteristics:

- Unique participant ID
- Name
- Birthdate
- Gender
- Sex at Birth
- Sexual Orientation
- Zip Code
- Rural Status
- Poverty Status
- Living Status
- ADLs/IADLs Assessment
- Caregiver/Care Recipient Relationship File
- Veteran Status
- Race
- Ethnicity



## TITLE VII ELDER ABUSE PREVENTION PROGRAM STANDARDS

### Program Goal & Service Definition:

**Elder Abuse Prevention, Education & Training:** Activities to develop, strengthen, and carry out programs for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation). This includes training for Title III E caregivers (informal/unpaid). [OAA § 721]

**Elder Abuse Prevention Educational Materials:** Educational materials and guidance kits distributed for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).

**OAA Service Type:** Title VII Elder Abuse Prevention & Training

**Service Type:** Non-registered service

**Area to be Served:** Santa Clara County

**Service Area Target Population:** Individuals, including Title III E informal caregivers, professionals, and paraprofessionals.

### Scope of Service & Funding:

Funding available\*: \$22,079

The minimum funding request is: \$22,079

**Required Match:** Title VII does not have matching contribution requirement.

### Service Standard:

- Public Education Sessions: 11
- Training sessions for professional: 4
- Elder Abuse Prevention Education Materials: 130

### Unit of Service Type:

- Elder Abuse Prevention, Education & Training: 1 session = 1 unit of service
- Elder Abuse Prevention Educational Material: 1 product = 1 unit of service

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2024-2025 Procedure available on the Sourcewise website:

<https://www.mysourcewise.com/about/grantees/>

\*Federal grant funds, provided under Title VII of the Older Americans Act – Vulnerable Elder Rights Protection Activities.



## Elder Abuse Prevention

### Program Specific Scope of Service:

1. Contractor shall meet the requirements of:
  - Title 22, California Code of Regulations, Division 1.8( <https://govt.westlaw.com/>)
  - California Department of Aging (<https://www.aging.ca.gov/>);
  - Older Americans Act, Title VII, Chapter 3 (pages 163 – 168) ([untitled \(acl.gov\)](#))
  - National Center on Elder Abuse: ([NCEA - Home \(acl.gov\)](#))
2. The service provider shall ensure that the Elder Abuse Prevention program shall do some or all of the following:
  - i. Provide for public education and outreach to identify and prevent elder abuse, neglect, and exploitation;
  - ii. Provide for public education and outreach to promote financial literacy and prevent identity theft and financial exploitation of older individuals;
  - iii. Ensure the coordination of services provided by AAAs with services instituted under the State adult protective service program, State and local law enforcement systems, and courts of competent jurisdiction;
  - iv. Promote the development of information and data systems, including elder abuse reporting systems, to quantify the extent of elder abuse, neglect, and exploitation in the PSA;
  - v. Conduct analyses of local Adult Protective Services and Long-Term Care Ombudsman information concerning elder abuse, neglect, and exploitation and identifying unmet service, enforcement, or intervention needs;
3. Conduct training for individuals, including caregivers, professionals, and paraprofessionals, in relevant fields on the identification, prevention, and treatment of elder abuse, neglect, and exploitation, with particular focus on prevention and enhancement of self-determination and autonomy.
4. Actively participate in the development of the AAA Area Plan on Aging including annual updates regarding Elder Abuse Prevention & Training goals and objectives with Sourcewise, PSA10.
5. Develop and implement efficient processes set forth by the Older American Act, Title 22, CCR and adhere to Program Memos issued by the California Department of Aging.
6. **Objectives:** The service provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2024 – June 30, 2025. Included in the Older Americans Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

### Targeting

Bidder must have established methods, other than use of means testing, to provide services to all informal family caregivers or a grandparent, or an older individual who is a relative caregiver. Programs, services, and activities must be very specific and explicit about the communities they are attempting to address gaps in service delivery.

Additionally, demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

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

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

### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program.

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

### Coordination

Bidder must form and administer cooperative agreements with other agencies to demonstrate appropriate agency linkages and coordination to ensure comprehensive service delivery and avoid unnecessary duplication.

### Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution printed 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.

### Client Input

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

### Client Contribution

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

### Reporting Requirements:

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

Awarded applicant is required to record and report Title VII B service delivery on the CDA Form 1037 Template, provided upon award of contract. The report shall include at minimum the total Elder Abuse Prevention, Education and Training sessions and Elder Abuse Prevention, Education Materials from the Elder Abuse Prevention Quarterly Activity Report (CDA Form 1037).

As a “non-registered” service, requirements include reporting estimated enrollment of clients/audience and service units on a quarterly and annual basis. Upon award the required Title VII reporting templates will be provided by Sourcewise.