

**Request for Proposal  
Application Information**

*Fiscal Years 2020 - 2022*

**Homemaking, Personal Care, Respite,  
Congregate Meals, Home Delivered Meals,  
Legal Assistance**

*Fiscal Year 2020*

**Evidence Based Disease Prevention, Elder Abuse  
Prevention, National Family Caregiver Support,  
Merit Award**



**Northeast Michigan Community Service Agency, Inc.  
Region 9 Area Agency on Aging**

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\*Aging and Adult Services Agency (formerly OSA) Standards have been provided in RFP packet and Region 9 AAA Local Policies will be sent to bidders in electronic form.

REGION 9 AREA AGENCY ON AGING  
APPLICATION INFORMATION  
FISCAL YEARS 2020-2022

*Section I*

- I. **Application Information** - Organizations proposing to deliver services through the Region 9 Area Agency on Aging (AAA) under a Multi-Year Implementation Plan must follow designated application and bidding procedures.

The following services are offered for bid in bundles (Core Programs):

In Home Services

Homemaking  
Personal Care  
Respite

Meals

Congregate  
Home Delivered

All other services are to be bid on separately. The other services are:

Legal Assistance (Multi-Year 2020-2022)  
Evidence Based Disease Prevention Program (Annual)  
Tobacco Settlement Respite Program (Annual)  
National Family Caregiver Support Program (Annual)  
Elder Abuse Prevention Program (Annual)

The Northeast Michigan Community Service Agency Inc. (NEMCSA) - Region 9 Area Agency on Aging has available **Homemaking, Personal Care, Respite, Congregate Meals, Home Delivered Meals, and Legal Assistance** for Fiscal Years 2020 – 2022 and **Evidence-Based Disease Prevention Health Promotion, Elder Abuse Prevention, National Family Caregiver Support Program and Merit Award Funds** for Fiscal Year 2020. NEMCSA - Region 9 Area Agency on Aging reserves the right to accept or reject, to fund in whole or in part any proposal received. Preference will be given to those proposals that further the area plan goals of the NEMCSA - Region 9 Area Agency on Aging and maximize participant choice.

The performance of work under this award may be terminated by NEMCSA - Region 9 Area Agency on Aging in whole or in part, when grant dollars change or whenever for any reasons, NEMCSA - Region 9 Area Agency on Aging shall determine that such termination is in its best interest. Any such termination shall be instituted by delivery to the sub-contractor of a written notice specifying the extent to which performance of work under the award is terminated and the date on which such termination becomes effective. The award shall be equitably adjusted to compensate for such termination and modified accordingly. It is understood that such equitable adjustment shall include all sub-agreement cancellation charges arising out of the termination of this award. Area Agency on Aging approved funds awarded for FY 2020 under this (RFP) must be obligated by September 30, 2020. Award of these funds does not constitute any guarantee of future financial support.

The NEMCSA - Region 9 Area Agency on Aging will provide reimbursement for documented participants/units served except for funds provided for equipment or special projects.

All submitted work provided within the scope of the contract must be supported by invoices, requisitions, activity sheets or other documentation, which can readily be traced to this contract. During each fiscal review the reimbursement in relationship to product may be reviewed. Subcontractor will recognize and accept all terms and conditions of the contract.

Recipients of grant awards shall comply with applicable program reporting and monitoring requirements as specified by NEMCSA - Region 9 Area Agency on Aging. Aging and Adult Services Agency standards will be utilized.

**Homemaking:**

The Homemaking funds are intended to provide participants 60+ with service of routine household tasks to maintain an adequate living environment for older individuals with functional limitations.

**Personal Care:**

The Personal Care funds are intended to provide participants 60+ with in-home assistance with daily living (ADL) including assistance with bathing, dressing, grooming, toileting, transferring, eating and ambulation. Personal care does not include health oriented services as specified for Home Health Aide Services.

**Respite:**

The Respite funds are intended to provide companionship, supervision, and/or assistance with activities of daily living for eligible persons with mental or physical disabilities and frail elder persons in the absence of the primary caregiver(s).

**Home Delivered Meals:**

The Home Delivered Meal funds are intended for the provision of nutritious meals to homebound older persons.

**Congregate Meals:**

The Congregate Meal funds are intended for the provision of nutritious meals to older individuals in congregate settings.

**Legal Assistance:**

The Legal Assistance funds are intended to provide participants 60+ with legal assistance through, cases, projects, community collaborations and other services that provide the most impact whether for an individual client or group of older adults.

**Evidence-Based Disease Prevention (Title III-D Level III EBDP Programs Only):**

The Evidence-Based Disease Prevention (EBDP) funds are intended to provide individual participants 60+ with information and support to assist them in avoiding illness and improving health status. This Request for Proposal (RFP) addresses the portion of funds to be used for: Evidence-based programs that assure and promote healthy senior outcomes, provide education, and link older persons to health related activities. To foster the development and testing of new approaches for sustaining the health and well-being of older adults, grants will be made on a competitive basis. All contracts for Title III D EBDP program funding must meet the Level III criteria.

### **Elder Abuse Prevention:**

The Elder Abuse Prevention funds are intended to provide individual participants 60+ with information and support to assist them in the prevention and treatment of elder abuse, neglect, and exploitation. This Request for Proposal (RFP) addresses the portion of funds to be used for: programs that assure and promote activities to develop, strengthen, and carry-out programs for the prevention and treatment of elder abuse, neglect, and exploitation. To foster the development and testing of new approaches for the prevention and treatment of abuse, neglect and exploitation of older adults, grants will be made on a competitive basis.

### **National Family Caregiver Support Program:**

The National Family Caregiver Program is intended to help family members who are struggling to care for their loved ones that are ill or have disabilities. This Request for Proposal (RFP) addresses the portion of funds to be used for: information about services, assistance to access services, individual counseling, organization of support groups, caregiver training, respite care, kinship care and supplemental services. To foster the development and testing of new approaches for sustaining the efforts of families and other informal caregivers, grants will be made on a competitive basis.

### **Merit Award:**

This Request for Proposal (RFP) addresses the portion of funds to be used for adult day care services. Priority will be given to: (a) establishing adult day care programs where none currently exist (b) expanding or enhancing existing adult day care programs and (c) the on-going support of adult day care centers.

A sliding fee scale is mandatory for all cost reimbursements. **A copy of the applicant's cost sharing schedule must be attached to the application for funding.**

### **Submission of Proposals:**

Complete the Request for Proposal application. Proposals should be completed using the electronic fillable form. If the fillable space in the form provided is not sufficient, attach additional pages.

**One original** signed proposal and **three copies** must be received at the Region 9 AAA office by 4:30 p.m., June 3, 2019. Submit proposals to: **NEMCSA Region 9 AAA; Yvette Smigelski, Business/Financial Resources Manager-Aging Programs; 2375 Gordon Rd.; Alpena, MI 49707**

- A. **Application Structure** - All applications include the following  
**Cover Page:** Applicant agency information and program selection.  
**Narrative:** Provide programmatic information regarding proposed services and the applicant agency.  
**Budget:** Provide a complete budget and narrative with yearly expense projections and unit costs. (Homemaking, Personal Care, Respite, Congregate and Home Delivered Meals do not require budget narrative.)  
**Attachments:** Required for proposals.  
**Assurances:** Include signed compliance documents and statutory assurances that will govern program operations.
  
- B. **Eligible Applicants for Funding** - Public, private nonprofit making organizations and political subdivisions of the State who offer services that meet the AAA's minimum standards and serve the Michigan counties of Alcona, Alpena, Arenac, Cheboygan,

Crawford, Iosco, Montmorency, Ogemaw, Oscoda, Otsego, Presque Isle and Roscommon are eligible applicants. Contracting with profit-making organizations requires prior approval from the Michigan Aging and Adult Services Agency formerly Office of Services to the Aging (OSA).

- C. **Eligible Services through the Competitive Bidding Process** - The types of services to be funded through the competitive bidding process are announced in the official Request for Proposals (RFP). Minimum services standards have been established for each type of service. Compliance with these standards is mandatory.
- D. **Service Area** - At a minimum, services must be provided on a county-wide basis.
- E. **Population to be Served** - All persons aged 60 and older who are residents of Region 9's service area, are eligible for federal and state-funded service delivery regardless of race, color, religion, national origin, age, sex, sexual orientation, height, weight, marital status, or income.
- F. **Target Population** - Although all individuals aged 60 and older are eligible to receive federal and state funded services, substantial emphasis must be given to serving older persons with the greatest social, economic or functional need. For targeting and planning purposes, the following poverty thresholds are to be used:

1. **2019 Poverty Guidelines**

<u>Size of Family Unit</u>	<u>Contiguous (48) States and District of Columbia</u>
1	\$12,490
2	\$16,910

For each additional family member add \$4,420.

- 2. **Handicapped** - Persons at a disadvantage or deficiency, physical or mental disability that prevents or restricts normal achievement.
- 3. **Social Need** - A participant is defined as having a social need if they: a) are physically handicapped; b) are mentally handicapped; c) do not speak English; d) live alone; or e) are geographically isolated.
- 4. **Frail/Disabled Elderly** - Persons aged 60 and over having a physical or mental disability, including Alzheimer's disease or a neurological or organic brain disorder of any type, that restricts the ability of an individual to perform individually or live independently.

Note that providers of aging services may not use a means test although methods such as location of services and specialization in the types of services most needed by these groups may be needed to meet the requirement.

**Section II**

II. **Selection Process** - The selection process is conducted in a manner that provides for free and open competitive bidding on services to be provided in the region. Awards shall be made to the service provider whose proposal is most advantageous to the AAA plan with all factors, including cost, being considered. Proposals may be denied at the determination of the Board of Directors. Established timetables will be strictly adhered to.

A. **APPLICATION TIMETABLE – FY 2020 - 2022**

April 01, 2019	Official Request for Proposal (RFP) Announced
April 22, 2019	Letters of Intent Due
May 01, 2019	Pre-bidders Conference (10:00 a.m. – 12:00 p.m)
May 17, 2019	Deadline to submit questions
June 03, 2019	Deadline to submit Request for Proposals <b>(One original signed proposal and three copies must be submitted by 4:30 p.m.)</b>
July 10, 2019	Mail Recommendations to the Northeast Michigan Regional Council on Aging
July 22, 2019	Northeast Michigan Regional Council on Aging Recommendations to NEMCSA Board
August 02, 2019	NEMCSA Board of Directors Selection
August 12, 2019	Notification of Contract Awards and Denials
October 01, 2019	Start Date for Contracts

B. **Proposal Review Process** - All proposals received will be reviewed and evaluated based on scoring criteria. Proposals scoring the minimum 40 points will be eligible for funding; however, achieving minimum scoring does not guarantee funding. The scoring process is the basis for making funding recommendations to the Northeast Michigan Regional Council on Aging, an advisory board to the NEMCSA Board of Directors. The Northeast Michigan Regional Council on Aging will then make final recommendations to the NEMCSA Board of Directors.

If only one bid is received per county for the three-year core programs (Homemaking, Personal Care, Respite, Congregate Meals & Home Delivered Meals), awards may be made to entities with demonstrated previous experience and without citations.

- C. **Request for Proposal (RFP)** - Applications for funding are reviewed and rated according to their responsiveness to the Request for Proposal.

The Northeast Michigan Regional Council on Aging, at its discretion, may recommend certain contracts for funding with an agency under current contract with the AAA by conducting an abbreviated review process, providing that an appropriate complete proposal is submitted. Conditions under which this may occur include:

1. **Competition** - Lack of competition in a specific service category;
2. **Funds** - Categorical funding resources;
3. **Funds Available** - Requests for funding do not exceed funds available for a specific service category.

Proposers with specific circumstances such as significant assessment or reassessment findings, or who have undergone recent organizational changes may be subject to a more comprehensive review process by the Northeast Michigan Regional Council on Aging.

The AAA reserves the right to accept or reject any or all proposals.

- D. **Policy Waivers** - All policies and procedures of the AAA shall be strictly adhered to except in those cases where waivers are specifically allowed under AASA rules and regulations. In such cases a written request for the waiver, including the rationale for such a request, must be submitted to the AAA for approval. Approval must be given prior to any change in operations.

Waiver requests pertaining to Minimum Service Standards should be submitted by the proposer as part of the application process. Consideration of and recommendations regarding such requests will be determined as part of the proposal review process. Minimum service standards waiver requests submitted to the AAA mid-year will be subject to approval by the NEMCSA Board of Directors.

E. **Contract Procedures**

1. **Multi-Year** – Multi-year contracts are secured under the premise of establishing stability in a provider pool and program costs, therefore, it is expected rates remain static over the contract duration. However, the AAA may be open to discussing slight adjustments for extenuating circumstances. No contract that is multi-year shall exceed the multi-year plan timeframe. All multi-year contracts shall be contingent on funds being available and receipt by the AAA of a statement of grant award.
2. **Authority** - The AAA maintains full authority and option to develop an RFP process in each geographic area for the services needed.
3. **Services** – The option as to which services to include in the annual RFP process is determined by the NEMCSA Board of Directors.
4. **New RFP** – conditions under which a new RFP is issued may include:



- a. Inadequate contractor performance;
  - b. Subsequent amendments to the Multi-Year Plan or AIP;
  - c. Significant changes in the scope or nature of the service to be provided as related to state or federal requirements;
  - d. Particularly competitive service environments that may offer opportunity for significant cost savings of federal or state dollars;
  - e. Significant contractor change in the administrative authority or organizational structure.
- F. **Notice of Award** - Written notification of Board action regarding the approval or denial of service proposals will be sent by mail within seven (7) days of action.
- G. **Appeals** - Those applicants whose proposals are denied by the AAA have the right to appeal their denial. Written intent to appeal must be sent to the AAA within ten (10) days from the official notice of the decision.
- H. **Contract Negotiations** - Final negotiation of contracts, authorized by the NEMCSA Board of Directors, will be conducted by the AAA staff after Board selections have been announced, but prior to actual project start-up on October 01, 2019, when funding conditions, if any, such as cost per unit, participant service levels, budget concerns, and related program concerns as specified in the notice of awards, are negotiated.

### ***Section III***

- A. **Funding Sources** - Both state and federal funds are available through the AAA, and are administered in like fashion. State and federal funds are to provide for direct aging service costs and are not intended to stabilize organizations or provide for their solvency.

Title III is the principal federal source of funds for planning and services for older persons through the Older Americans Act. State aging services funding was established in 1978 and provides categorical funding in three areas: alternative care services, home delivered meals and ombudsman.

- B. **Matching Requirement** - The funding philosophy of aging service programs assumes some local resources are available for local programs. Therefore, all funding is on a percentage basis with both federal and state funds requiring a match. For purposes of the RFP budget, utilize 10% of the amount requested as the figure for cash match for annual programs. Utilize the estimated match allocation worksheet for the multi-year programs. The required cash match amount will be provided with the Statement of Grant Award.

Documentation that the match is being provided is submitted as a component of the financial reporting for reimbursement. Technical assistance regarding reporting requirements will be provided to successful applicants prior to the beginning of the fiscal year. Definitions of matching sources, may be soft or hard, are provided in the AASA line item definitions.

- C. **Program Income** - Program income includes, but is not limited to, donations from participants received by a contractor for services provided with contract funds. Program income is used for budgeted line items to expand the service and reduce the need for federal funding participation. Regulations governing program income include:

1. **Opportunity** - Older persons must be given an opportunity to contribute; however, an older person who requests services cannot be denied a service because he/she “will not or cannot contribute to the cost of the service.”
2. **Privacy** - The privacy of contributions made by older persons must be protected;
3. **Expand Services** - Program income must be used to expand or increase service delivery for allowable costs only and cannot be used as match for federal or state dollars. Program income dollars are spent first, before federal or state grant funds;
4. **Budgeting** - Program income must be budgeted in the service for which it is received;
5. **Handling** - The person handling program income must be bonded and all funds must be properly counted and reported to the bookkeeper for accounting/audit purposes;
6. **Accounting** - Program income must be accounted for separately within the contractor’s accounting records;

7. **Carry-Over** - Program income cannot be carried from one fiscal year to the next.

D. **Method of Reimbursement** - The AAA will use the expense reimbursement system for subcontractors. Exceptions will be made where the AAA's funding source indicates constraints or departures from such reimbursement system. Where possible, start-up advances will be forwarded, however will be reconciled to submitted expenses.

All submitted expenses provided within the scope of the contract must be supported by invoices, requisitions, activity sheets or other documentation, which can readily be traced to this contract. During each fiscal/program assessment, the reimbursement in relationship to units may be reviewed.

## *Section IV*

### IV. **Reporting System**

- A. **Financial** - Providers will receive payment for services on a monthly-basis reimbursement method determined by the individual contract or agreement. A monthly report is due within five calendar days following the last day of the end of the month. Matching resources provided by service providers will be reported as part of the monthly reporting process.
- B. **Programmatic** - Contractors will report programmatic activities, which will be reported to the AAA utilizing the reporting system as mandated by the State and Federal Government. A participant tracking system will be utilized for reporting and will include a billing component that will be matched to care plans for payment of vendors under the purchase of service system. The system to be used is determined by the purchase of service contract or the contracted services. Reimbursements will be contingent not only on receipt and approval of the monthly financial reports or billing of the vendor, but on programmatic information and reports as well.

AAA programmatic reports and application package request information about units of service and unduplicated (UD) participant counts. Definitions for a unit of service vary for the different service categories and are stated as part of the Minimum Service Standards.

The unduplicated participant count refers to the counting of a person receiving a service only one time within the fiscal year. A participant is counted as unduplicated the first time he/she receives a particular service and is not counted again as UD for the entire contract period.

Since only new participants are reported in the UD count, it is common for the planned number of units of service to be greater than the planned number of UD participants.

Contractors must keep track of reported units of service and UD participants for each service category within their filing system. Verification of reported programmatic activity is a part of the AAA's on-site monitoring.

*Section V*

**GENERAL SPECIFICATIONS AND LIMITATIONS  
FOR  
ALL SERVICE PROGRAMS**

Grantees providing services to 60+ persons with federal or state funds must:

1. Comply with AASA Operating Standards, Section II, General Requirements for all Service Programs and Section II A. General Requirements for Nutrition Programs For The Elderly.
2. Assure the capacity to maintain fiscal and program records for periodic reporting to the grantor in accordance with established reporting requirements. Subcontractors will report to the AAA at intervals determined by the AAA and maintain recording mechanisms as determined by the AAA.
3. Establish appropriate procedures to safeguard and account for contributions. All contributions made by older persons as a result of funded services are considered program income and **MUST** be reported as such. Program income for each respective service must be used to expand that service.
4. Establish and maintain AAA approved standard intake procedures.
5. Establish and follow procedures for obtaining views of recipients about the operation of services they received.
6. Assure that any existing state and local licensure or safety requirements will be met.
7. Give minimum eligibility criteria per service to referral agencies.
8. Perform adequate outreach and advertising activities to assure participation of eligible older persons.
9. Assure that any non-eligible participant under 60, served by programs which utilize these grant funds, meets all service specific requirements, does not displace a senior and pays the full cost of the service.
10. Comply with the AAA's right to inspect the records of the service provider during normal business hours and as often as deemed necessary by the AAA.
11. Assure that current and ethical business and management practices will be implemented, including Personnel Policies, Job Descriptions, etc.
12. Assure compliance with additional standard(s) by service as required. (See Service Specifications and Aging and Adult Services Agency formerly OSA Minimum Standards)

13. Assure adoption and adherence to a Code of Ethics and adhere to all applicable policies of AAA and/or Aging and Adult Services Agency (AASA) including Aging and Adult Services Administrative Rules and Minimum Standards.
14. Provide AAA, AASA and HHS, if requested, with up to three copies free of charge any publication produced as part of contracted funds and comply with copyright and acknowledgment regulations as specified in the contract.
15. Provide documentation of the applicant's legal status. Contracts may be entered into with public, private non-profit or profit-making organizations. When the applicant is a profit-making organization, the AAA will submit the contract to AASA for prior approval.
16. Entertain any further subcontract of funds awarded under this grant proposal only with prior approval of such subcontracts by the AAA. Subcontractors shall be subject to all conditions and provisions of the contract. The contractor shall be responsible for the performance of all assignees or subcontractors; however, the AAA shall be able to monitor and assess any further subcontracts according to the specifications of the RFP and the original contract. Procedures for subcontracting as specified in the contract must be followed.
17. Assure that elderly members of Indian tribes and organizations within the PSA receive services equivalent to non-Indian elderly residents.
18. Assure participants access to Council/Commission board meeting minutes by posting them at each site.
19. Assure compliance with contract confidentiality language in accordance with and pursuant to federal and state laws and regulations, including the Health Insurance Portability and Accountability Act (HIPAA).
20. Recognize and accept all terms and conditions of the contract.
21. Special Conditions:
  - 1) Care Management clients will receive priority.
  - 2) Prior to spending Title IIIE Grandparent funds, the purpose of the funds must be endorsed by the AAA.
  - 3) Prior to release of Evidence Based Disease Prevention program funding an annual schedule of classes must be received by the AAA. Leaders of EBDP programs must have current certification and be in good standing with the certifying organization.
  - 4) Pending the outcome of the assessment performed by NEMCSA's audit firm, documentation of expenses may be required.

## HOME DELIVERED MEALS

Meals are delivered to the homes of older persons who are unable to adequately prepare their own meals or attend congregate meal site because of temporary or permanent physical or mental impairment.

**UNIT OF SERVICE:** Each meal delivered to an eligible participant.

### **SERVICE SPECIFICATIONS AND LIMITATIONS:**

1. Comply with AASA Operating Standards, Section IIA General Requirements for Nutrition Programs for the Elderly, B-5.
2. Be able to provide weekend meals and up to three meals per day to an eligible participant based on need as determined through the participant assessment.
3. Liquid supplements may be purchased with Title III funds. The liquid supplement by itself cannot be counted as a meal.
4. Accept Bridge card in lieu of cash contributions when requested by the meal participant as an alternative mode of payment.
5. Assure that persons delivering meals will be provided initial training and two additional trainings each fiscal year. Training date, topic and attendance list must be sent to the AAA.
6. Assure, to the best of its ability, that in the event of site closure or short-term natural disasters such as snow and ice storms, etc., participants will continue to receive home delivered meals.
7. Comply with AAA requirements for food protection and menu development.
8. Provide Nutrition Education to home delivered meal participants as appropriate and submit a copy, including the number of home delivered meal participants, to the AAA monthly. Nutrition Education materials must be supplied by the AAA, a registered dietician, a dietetic technician or the AAA must approve all materials prior to presentation.
9. To the extent possible, Home Delivered Meals shall be served hot versus frozen.
10. Comply with General Specifications and Limitations, Section V.

# CONGREGATE MEALS

Congregate meal programs provide low-cost, nutritionally sound meals to the elderly in group settings. Programs promote health through improved nutrition, nutrition education, reduced isolation, and provide for a variety of social experiences.

**UNIT OF SERVICE:** Each meal provided to an eligible participant.

## **SERVICE SPECIFICATIONS AND LIMITATIONS:**

1. Comply with AASA Operating Standards, Section IIA General Requirements for Nutrition Programs for the Elderly, C-3.
2. Prepare meals on site with the exception of AAA/AASA approved satellite sites.
3. Obtain waiver from AAA annually for sites not in compliance with 3 day/4 hour 10 person minimum standard.
4. Establish a fee for non-senior staff that will not be less than the suggested senior donation rate and covers the full cost of the meal.
5. Establish a policy regarding meal contributions for non-senior nutrition volunteers that may not be less than the suggested senior donation.
6. Implement a guest sign-in sheet and utilize a uniform method for documenting receipt of required program income from non-eligible participants. If utilizing software (i.e. MySeniorCenter), the participant must sign a NAPIS form.
7. Conduct in-service trainings for congregate and home delivered meal staff at least twice each fiscal year. One of the trainings must include sanitation. Training date, topic and attendance list must be sent to the AAA.
8. Conduct approximately 5 to 15 minutes of Nutrition Education and submit a copy of the program, including the number in attendance, to the AAA monthly. Nutrition Education must also be presented at satellite sites and to meal voucher participants. Nutrition Education materials must be supplied by the AAA, a registered dietician, dietetic technician or the AAA must approve all materials prior to presentation.
9. Comply with General Specifications and Limitations, Section V.

AASA Operating Standards: [www.osapartner.net](http://www.osapartner.net)



# LEGAL ASSISTANCE

Services provided include legal education, advice and representation by an attorney (including counseling and or other appropriate assistance by a paralegal or law student under the supervision of an attorney), and counseling or representation by a non-lawyer where permitted by law to older individuals.

**UNIT OF SERVICE:** Provision of one hour of an allowable service component

## **SERVICE SPECIFICATIONS AND LIMITATIONS:**

1. Comply with AASA Operating Standards, Section III, C-10 and AAA Local Policies.
2. Upon reasonable request, advise and monitor AAA staff in the substantive law and procedures of government benefit programs and client advocacy.
3. Provide backup assistance to the AAA staff on individual cases, including telephone consultation, mailing of pertinent informational material, and in limited circumstances, direct representation of clients.
4. Provide an Elder Law Outreach Program to older persons in Region 9.
5. Develop pro bono activities and senior legal assistance expertise and services with Northeast Michigan attorneys.
6. Will not provide services in fee-generating cases and will refer any fee-generating cases to local bar.
7. Prepare articles on elder issues for publication in county newsletters.
8. Provide trainings to organizations that target the 60+ population, on topics that address relevant elder issues.
9. Comply with General Specifications and Limitations, Section V.

*AASA Operating Standards: [www.osapartner.net](http://www.osapartner.net)*

# RESPIRE CARE

Respite Care provides companionship, supervision and/or assistance with activities of daily living for the mentally or physically disabled and frail elderly in the absence of the primary caregiver(s).

**UNIT OF SERVICE:** One hour of respite care provided.

**SERVICE SPECIFICATIONS AND LIMITATIONS:**

1. Comply with AASA Operation Standards, Section III, B-10.
2. Provide for personal care training and/or training manuals for service providers prior to placement in the home.

*AASA Operating Standards: [www.osapartner.net](http://www.osapartner.net)*

# AASA LINE ITEM DEFINITIONS

The following line item definitions are to be used by Area Agency contractors:

**SALARIES AND WAGES:** This category is to include the compensation paid to all permanent and part-time employees. This does not include professional fees, contractual services or personnel hired on a personal contract basis.

**FRINGE BENEFITS:** This category is to include the employer's contributions for insurance, retirement, unemployment, workman's compensation, FICA and other similar benefits for all permanent and part-time employees.

**TRAVEL STAFF:** This category is to include travel costs of permanent and part-time employees only. This includes cost for mileage, per diem, lodging, registration fees for approved seminars or conferences and other approved travel costs incurred by the employees. Travel for consultants or board of directors is included under OTHER COSTS.

**SUPPLIES:** This category is to be used for all consumable and short-term items and equipment items costing less than five thousand dollars (\$5,000.00). This includes office, janitorial, disposable food supplies, cooking utensils, etc.

**EQUIPMENT:** This category is to be used for all stationary and movable equipment. The cost of a single unit or piece of equipment includes the necessary accessories, installation costs and taxes. Equipment items costing less than five thousand dollars (\$5,000.00) are to be included in the SUPPLIES category. All expenditures for equipment must be related to the service category. Maintenance contracts for equipment are not budgeted under EQUIPMENT. All equipment purchases must have prior approval from the AAA.

**OCCUPANCY:** (1) Office Space – this includes costs for office space, which include utilities if not paid separately. (2) Utilities – this includes the costs of utilities such as heat, electricity, etc. This does not need to be budgeted separately if included in the rent.

**COMMUNICATIONS:** This is to include costs of postage, telephone, copying and printing.

**SERVICE CONTRACTS:** This is to include all contracts the Area Agency subcontractor enters into. All subcontracts must have prior approval by the AAA.

**OTHER:** This is to include costs not included in the previous categories. Examples of such costs are liability insurance, bonding, consultant fees, equipment rental and leases, volunteer travel, board travel, etc.

# APPEAL PROCEDURES FOR CONTRACTORS AND PROJECT APPLICANTS

The appeals procedure is available for contractors or applicants under the following conditions:

- Contractor placed on probation
- Contract suspended or terminated
- Administrative actions of the AAA's governing board imposes or limits requirements on either contractor or applicant whose request for approval is denied.

Appeals will be conducted in accordance with the following:

1. The contractor/project applicant must give just notice of intent to file an appeal with the Area Agency on Aging Director. The written request of appeal must be received within ten (10) days of receipt of written notice of the Area Agency on Aging's action.
2. All testimony submitted must be written and must accompany the appeal.
3. The written request must state the reason(s) for the appeal and must be received at least seven (7) days prior to the appeal.
4. The Chairperson of the NEMCSA Board of Directors will arrange the hearing time and place within ten (10) working days of receipt of the appeal.
5. The written request must be filed with the Chairperson of the NEMCSA Board of Directors who shall appoint the executive committee appellate group. The Chairperson may appoint a member of the Northeast Michigan Regional Council on Aging to the appellate group; who would have voting rights.

NEMCSA Chairperson is:      Name: Pete Hennard, President  
  Address: NEMCSA Board of Directors  
  2375 Gordon Road  
  Alpena, MI 49707

6. The Chairperson of the NEMCSA Board of Directors shall render the Board's decision within ten (10) working days.
7. It is incumbent upon the appellant group to act within the ten (10) days or the appealing party will be deemed to have won.
8. All hearing procedures will be recorded by a secretary appointed by the presiding officer.
9. Failure of the appealing party to appear dismisses the appeal.
10. If the Chairperson of the NEMCSA Board of Directors denies the request or decides the case against the contractor/project applicant, contractor/project applicant may appeal the decision to the Aging and Adult Services Agency, formerly Office of Services to the Aging, within ten (10) days of receipt of the written notice of the AAA's governing board's determination. The written request must state reason(s) for appeal to Aging and Adult Services Agency and the Agency must review and act on the appeal as provided by R400.20309(1) or to arbitration in accord with provisions of the American Arbitration Association or a similar recognized professional arbitration organization. The arbitrator shall determine the distribution of costs between parties.

The Aging and Adult Services Agency will receive all information during any appeals.

# 2020 Ranking Criteria

## **Homemaker, Personal Care, Respite, Congregate Meals, Home Delivered Meals, Legal Assistance Evidenced Based Disease Prevention Health Promotion, Elder Abuse Prevention, National Family Caregiver Support Program, Merit Award**

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Proposals will be rated and scored according to the following Ranking Criteria. The maximum possible score is 50 points for each proposed project. Any proposals scoring below 40 points will be rejected. Scoring the minimum of 40 does not guarantee funding for proposed program.

**Organization:** \_\_\_\_\_ **Score:** \_\_\_\_\_

**Proposed Project:** \_\_\_\_\_

\_\_\_\_\_ **Section I (6 points)** Amount Requested: \_\_\_\_\_

Is the purpose of the organization stated?

Do funds requested match the budget?

Is the geographical area to be served identified?

\_\_\_\_\_ **Section II (24 points)**

Is the organization described?

Is the project/service clearly defined?

Did the proposer state which goal will be met and is it appropriate for the program? Does the program comply with AASA standards?

Are the objectives clear, measurable and is the method of measuring identified?

Has the impact been described?

Is the target population and priority in which to be served identified?

Does the proposal address the priority criteria the program has to handle demand for services that exceed resources and is it reasonable?

Is the strategy for reaching the target population described?

Have staff positions been appropriately identified, their qualifications, and duties described as pertains to the specific service?

Is the past experience in providing it addressed?

Are collaborations identified?

Does the proposal address sustainability?

\_\_\_\_\_ **Section III (16 points)**

Is the budget complete? Are the other resources expenses identified?

Are all expenses allowable? Are they reasonable?

Have all expense line items been addressed? Are they categorized appropriately?

Are clients and units of service appropriate for the identified category? Has calculation been explained?

\_\_\_\_\_ **Section IV (4 points)**

Are all required attachments included and have they been completed in full?

Does the proposal adhere to format guidelines?