

**DETROIT AREA AGENCY ON AGING**  
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**Grants**  
**Part 1 of 2**

**REQUEST FOR PROPOSALS (RFP)**  
**FISCAL YEARS 2017**

**SPECIALIZED SERVICES**

**Instructions**  
**(Part 1 of 2)**

**Elder Abuse Prevention**

*Funded through State Funds*

**Planning and Service Area - Region 1-A:**

**Detroit, Grosse Pointe, Grosse Pointe Farms,  
Grosse Pointe Park, Grosse Pointe Shores,  
Grosse Pointe Woods, Hamtramck, Harper Woods,  
and Highland Park**

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**WAYNE W. BRADLEY, SR.**  
**Chairperson, Board of Directors**

**PAUL BRIDGEWATER**  
**President and CEO**

**DETROIT AREA AGENCY ON AGING  
REQUEST FOR PROPOSALS  
INSTRUCTIONS  
FISCAL YEARS 2017**

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**INSTRUCTIONS  
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## SCHEDULE OF ACTIVITIES

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The Detroit Area Agency on Aging is accepting proposals for Elder Abuse Prevention Services to be funded through State Funds for Fiscal Year 2017, covering the period July 1, 2017 to September 30, 2017.

### FISCAL YEAR 2017 REQUEST FOR PROPOSALS CALENDAR

RFP Notices published (Sunday Edition Newspaper) Sunday, April 9, 2017

RFP available on DAAA Website \* Thursday, April 13, 2017

Technical Assistance Workshop Monday, April 17, 2017 (9:00 a.m. – 11:00 a.m.)

(Detroit Area Agency on Aging, 1333 Brewery Park Blvd, Detroit, MI 48207, Rose Aguilar Conference Room 2nd Floor. Please call (313) 446-4444 ext. 5227 to R.S.V.P. your attendance.)

**NO ASSISTANCE WILL BE PROVIDED AFTER THIS TIME.**

<b>Proposals Due at DAAA Office **</b> <b>(Typed original and three copies)</b>	<b>Friday, May 5, 2017</b> <b>5:00 p.m. EST</b>
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<b>The official clock for the determination of the 5:00 p.m. EST will be the DAAA's office clock. Bids received after that date and time will not be considered. Bids that are incomplete, not properly endorsed or signed, will be rejected.</b>
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Proposal Review Process May 8, 2017 – May 12, 2017

Award/Denial Notifications May 23 – June 16, 2017

Contract Negotiations and Contract Completion June 19 – 23, 2017

Contract Distribution June 26 – 30, 2017

Commencement of Contract July 1, 2017

\* DAAA Website is: [www.detroit seniorsolution.com](http://www.detroit seniorsolution.com)

\*\* DAAA Office is located at: 1333 Brewery Park Blvd., Suite 200, Detroit, MI 48207-4544.

<b>Handwritten proposals will be rejected.</b> <b>Faxed and Emailed proposals will not be accepted.</b>
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## INTRODUCTION

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This Request for Proposals (RFP) contains the information and instructions required for submitting an application to the Detroit Area Agency on Aging (DAAA) for services to collaborate with faith-based organizations to determine unique characteristics of elder abuse and intervention/prevention in urban areas with large minority populations, and to train and support faith-based organizations in elder abuse identification, reporting and service interventions of seniors 60 years of age and older and/or their caregivers (as indicated). The funding period will be for fiscal year 2017 covering the period July 1, 2017 to September 30, 2017.

The Detroit Area Agency on Aging is a private, non-profit organization responsible for planning, coordinating, developing, and funding elder care services in the cities of Detroit, Grosse Pointe, Grosse Pointe Farms, Grosse Pointe Park, Grosse Pointe Shores, Grosse Pointe Woods, Hamtramck, Harper Woods, and Highland Park.

Founded in 1980, it is one of sixteen Area Agencies on Aging (AAA) in Michigan authorized under the Older Americans Act (OAA) of 1965, as amended. Under this federal act, all area agencies on aging receive federal funding and are responsible to their state unit on aging and indirectly to the Administration on Aging for the delivery of services to the older adults within their particular region. In the State of Michigan, Public Act 180 of the Older Michiganians Act of 1981 authorizes the Michigan Aging and Adult Services Agency to serve as the designated state unit on aging and specifically outlines the responsibilities of the state's sixteen area agencies on aging. It also authorizes the State to augment federal Older Americans Act dollars with funding from the state's general revenue budget.

Within planning and service area (PSA) 1-A, DAAA plans, coordinates, and monitors services to 153,511 older adults through the distribution of federal and state funds to human services agencies. Currently, twenty-three different services are provided through OAA (including National Family Caregiver Support Program), Older Michiganians Act, or Wayne County funding. In addition, DAAA also provides additional services to older adults, professionals in the field of aging, and others through public and private grants and contributions.

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## **PROGRAM NARRATIVE**

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This elder abuse prevention program will award grants to faith-based organizations addressing elder abuse concerns and how to promote elder abuse prevention, particularly in the areas of financial, abandonment, neglect/self-neglect, physical, sexual, emotional/psychological abuse.

Special attention will be given to those applications proposing community action projects; those with significant involvement by community or faith-based organization members who may have been victims of elder abuse or who are experiencing elder abuse problems (see types of abuse mentioned above), and projects that encourage collaboration between community members and various organizations to prevent elder abuse.

### **Examples of community action projects are as follows:**

- An elder abuse prevention program for caregivers of elderly to encourage individuals and other caregivers to speak out against elder abuse, and take action steps to get those who have witnessed elder abuse to report it, and share ways to prevent it from happening to others.
- A group developing surveys and collecting data about the types of elder abuse that have taken place in their community and using a tool kit to provide resources to the elderly on how they can prevent elder abuse.
- A group developing a video for elder abuse prevention.

These faith based organizations will implement their projects, and report the results of their projects to the Detroit Area Agency on Aging.

The program will award up to three grants to faith-based organizations within the DAAA jurisdiction. The program will consider proposals from faith based organizations whose interests are consistent with the goals of the program. The program will not consider grant proposals for retroactive funding of projects already completed.

### **Types of eligible projects**

Grants are to be awarded to up to three faith-based organizations for attempts to recognize the following abuse problems:

- Financial
- Abandonment
- Neglect/Self Neglect
- Physical
- Sexual
- Emotional/Psychological

Eligible projects are those that attempt to provide educational/training programs, collect surveys and data regarding abuse, or provide resources related to specified areas of Elder Abuse concerns.

### **Types of projects preferred**

Projects with significant involvement by FBO and community members who are affected by the problem are given priority. For example, a project focusing on prevention of financial or emotional abuse should involve current or former victims of abuse, or elderly at risk of being abused. Projects in which 50% or more of the applicants are affected by the problem will be given preference over those with less substantial involvement by the target population. Projects that encourage collaboration among community members and other FBO organizations are also given priority.

### **Types of projects not eligible**

- a) Direct subsidy of care for the elderly
- b) Direct subsidy of existing services by community organizations
- c) Projects identified with political parties of any kind
- d) Projects sponsored by a for profit organization
- e) Organizations that practice discrimination of any kind
- f) General contributions to capital campaigns
- g) Organizations who are not categorized as a faith base organizations
- h) Endowment programs
- i.) Construction projects or real estate acquisitions

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## **PLANNED FUNDING FOR SERVICE CATEGORY**

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### **A. PLANNED FUNDING FOR SERVICE CATEGORY**

Applicants may submit proposals for providing Elder Abuse Prevention during fiscal year 2017. **Applicants must review and adhere to the service definition and minimum standards for the service category as defined by the Michigan Aging and Adult Services Agency Operating Standards for Service Programs and/or Detroit Area Agency on Aging.** A copy of the standard is contained in this proposal. **Service delivery must occur within DAAA's geographic planning and service area.**

#### **1. ELDER ABUSE PREVENTION (Community)**

**Total Planned Level of Funding: \$17,000**

**Seeking up to 3 providers.**

Activities to develop, strengthen, and carry-out programs for the prevention and treatment of elder abuse, neglect, and exploitation.

### **B. TARGETING OF SERVICES**

The DAAA targets service provision to persons considered to be in the greatest economic or social need, with emphasis on serving **low-income, minority** individuals age 60 and over. The Older Americans Act includes the following statement:

The Urban Solutions Elder Abuse Initiative's methodology is to determine unique characteristics of elder abuse and intervention/prevention in urban areas with large minority populations.

### **C. REVIEW / SELECTION PROCESS**

Proposals must address the components outlined in the RFP, which were developed by DAAA in accordance with governing policies and authorizing rules, standards, and regulations. Proposals must contain the authorized organizational signatures, complete and accurate information as requested, and appropriate documentation as required.

Proposals will be reviewed and evaluated using established criteria. Proposals will also be evaluated and selected for reasonableness and competitiveness of costs and services; a program design that meets the needs as indicated in the proposal; equitable geographical distribution in our planning and service area; severity of need; past performance, if applicable; and availability of funding.

All applicants will be notified in writing of the funding decisions.

**Information provided by the applicant that is willingly, knowingly, and purposely false,**



**inaccurate, or misleading will be grounds for not considering a proposal for funding, for not awarding a contract, or for canceling a contract, if awarded.**

**D. SUBMISSION DATE**

**Proposals are due not later than Friday, 5:00 p.m. EST, May 5, 2017**, at the Detroit Area Agency on Aging office, 1333 Brewery Park Blvd., Suite 200, Detroit, MI 48207-4544.

**NOTE: A Pre-Proposal Technical Assistance Workshop will be held on Monday, April 17, 2017, at 9:00 a.m. at Detroit Area Agency on Aging, 1333 Brewery Park Blvd, Detroit, MI 48207. This Technical Assistance Workshop is the primary means of addressing questions and comments concerning this RFP. *NO ASSISTANCE WILL BE PROVIDED AFTER THIS TIME.***

**Submit one (1) original AND three (3) copies. (Late applications will be rejected).**

**E. FUND DISTRIBUTION IN PSA 1-A FOR FISCAL YEAR 2017**

As in past years, the DAAA will utilize a competitive bid process for distribution of funds within PSA 1-A.

The DAAA Board of Directors' awards shall be made to the responsible bidder whose bid is responsive to the RFP and is most advantageous to the area agency with all factors, including cost, being considered. All bids may be denied at the determination of the DAAA Board of Directors and a second request for proposals issued.

The DAAA Board of Directors has the discretionary authority to restructure the priority ranking of service objectives and/or the anticipated dollar amounts which apply to the services listed. Further, the Board has the authority to add or delete service objectives that are to receive funding for fiscal year 2017.

Contracts will be awarded to agencies whose applications best meet the stated criteria and are most advantageous to the DAAA goals of effective delivery of quality services.

Should the DAAA Board of Directors feel this is not reflected in applications received, it reserves the right to deny all applications and issue a second request for proposals for the specific service. All applicants have the responsibility for identification of goals, the development of a project plan to meet those goals, and the identification of gaps in current services. Well-planned and realistic service elements should be able to be implemented with a minimum of delay. Proposals must give priority to developing those activities and services which will assist and benefit seniors and their caregivers, as applicable, who are in the greatest social and economic need; low income and/or minority; frail elderly; physically and/or mentally impaired; and non-English or limited English speaking. Planning functions and the preparation of the grant application should be coordinated with participatory community groups and agencies.

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## APPLICATION GUIDELINES

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The Request for Proposals (RFP) process is to ensure that a fair and objective method is used for acquiring services for older persons and their caregivers with the public funds administered by Detroit Area Agency on Aging.

This RFP, however, does not commit DAAA to award a contract, to pay any cost incurred in the preparation of an application in response to this request, or to procure a contract for services or supplies.

DAAA reserves the right to accept or reject any or all proposals received as a result of the request, to negotiate with all qualified sources, or to cancel, in part or in its entirety, this RFP if it is in the best interest of this planning and service area. Further, all requested funds are subject to reduction based upon final award selections.

Budget development should reflect reasonable costs to implement the program or service proposed. In the case of an ongoing project, the applicant's existing financial commitment must be maintained during the period of Area Agency support.

In addition, all proposals shall have outcomes that are measurable and consistent with the service standards developed by the Michigan Aging and Adult Services Agency. These standards are available through the Detroit Area Agency on Aging and will also be available at the Pre-Proposal Conference.

Once a contract is issued to an applicant agency, that organization becomes fully responsible for administration of the program and expenditures of awarded funds, according to State Regulations and other policies or regulations. Each organization will be liable for any disallowed expenditures of funds and should discuss in the proposal how disallowed costs will be repaid to DAAA by the contractor.

**Applicants that do NOT meet the minimum eligibility criteria stated in Section A will NOT be considered. If Section A is met then applicants must meet the minimum eligibility criteria stated in Section B to be considered.**

**A. ELIGIBILITY CRITERIA**

- ✓ **The applicant must have been in existence for a minimum of three (3) years. Any public, private non-profit, or for-profit corporation (pursuant to P.A. 284 of 1972), which is incorporated in accordance with State statutes and authorized to conduct business in the State of Michigan is eligible to apply.**
- ✓ **The applicant must be financially viable as demonstrated by having a positive fund balance or retained earnings (as demonstrated by a financial report with balance sheet showing a positive fund balance or retained earnings).**
- ✓ **The applicant must demonstrate that they are current in all local, state and federal taxes.**

## **B. CRITERIA FOR ACCEPTANCE AND REVIEW OF APPLICATIONS**

1. The utilization of the DAAA format is required.
2. All applications submitted to DAAA for State funding must meet the following basic criteria if an application is to be considered:
  - a. Each agency must submit a *Section I: Agency Information* packet. A **separate** *Section II: Program Information* section of the application must be submitted for the service category.
  - b. Applications **must** be typed. Handwritten applications are unacceptable and will not be reviewed.
  - c. An **original** and **three copies** of full proposal is required. This includes *Section I: Agency Information*, and an **original** and **three copies** of *Section II: Program Information* of the proposal.
  - d. Proposals must be received in the DAAA office at 1333 Brewery Park Blvd., Suite 200, Detroit, MI 48207-4544 by **Friday, May 5, 2017**. (**Late applications will be rejected.**)
  - e. Proposals must address the published service category only, as included and described in this RFP.
  - f. All required documentation requested in the application and listed on the application checklist must be included with the proposal.
  - g. A copy of the insurance certificates, audit finding information, certified audit (or financial statements), IRS Form 941 with proof of payment, IRS Form 990, 501 c (3) notification letter, and the agency annual report are required, if applicable.
  - k. The applicant is required to submit a completed budget with application.
  - l. Authorized personnel must sign the application and all required forms.

## **C. PROPOSAL REVIEW CRITERIA**

Proposals received in response to this RFP will be reviewed and scored in four categories as follows:

1. **AGENCY QUALIFICATIONS AND EXPERIENCE** will be evaluated for the agency's ability to demonstrate their proficiency to operate the program or service for which it is applying, including, but not limited to, its legal status, mission, governance, leadership, experience in serving the population to be served by this proposal, and experience in providing the proposed service.

2. **MANAGEMENT AND FINANCIAL CAPACITY** will be evaluated for the agency's ability to demonstrate their capability to perform all contract requirements, including, but not limited to, its financial viability, entrepreneurial activities, organizational structure, administrative qualifications, management information system, technological capabilities, accounting system, audit procedures, internal control systems, past and pending legal issues, and previous audit/monitoring findings, if applicable, etc.
3. **PROGRAM DESIGN** will be evaluated for completeness of the program, given the problems identified and described in the problem need statement, and given the requirements of the service definition. Also, the staffing positions, qualifications of the program staff, and their ability to implement the proposed program or service will be reviewed for reasonableness, in addition to any current implementations of best practices research and models. Program design will also be evaluated for:
4. **PROPOSED BUDGET** will be evaluated for its reasonableness in assigning costs (i.e., reasonable costs to implement the program or services proposed), the staffing costs, and the overall budget relationship of costs to program design.

**D. REVIEW PROCESS**

1. EXECUTIVE COMMITTEE

The DAAA Board Executive Committee will review the recommendations for final report to the DAAA Board of Directors.

2. BOARD OF DIRECTORS

The DAAA Board of Directors will review recommendations at an open meeting. They will select fiscal year 2017 providers, funding levels, levels of service to be provided, and contract conditions (if any).

The Board of Directors reserves the right to:

- a. Reject any and all proposals.
- b. Modify, during the course of the bidding, selection, and contracting process, any and all parts of the process for valid reasons, as determined by the Board.
- c. Accept any proposal for specified reasons regardless of scoring or evaluation by any committee or other entity.
- d. Offer a contract to any applicant for a service or service area different from that proposed.
- e. Require any applicant to resubmit or modify a proposal under specified

conditions.

- f. Reject any proposal as incomplete or non-responsive, as determined by the Board.
- g. Contact an applicant for additional information or clarification.

#### 4. NOTIFICATION TO APPLICANTS AND APPEALS

After funding recommendations have been approved by the Board, all applicants will be notified of the decisions made by the Board. DAAA's Appeals Procedure will be sent to all unsuccessful applicants and is available upon request at the DAAA office.

#### 5. CONTRACTS

Contracts will be signed, and reimbursement will take place when all the contract conditions (stipulations) noted have been satisfactorily resolved. DAAA staff will be available to discuss with contractors negotiable contract conditions after the DAAA Board of Directors awards contract funds.

### E. REPORTING REQUIREMENTS

#### 1. MONTHLY REPORTS

- a. Financial Status Report (FSR) due monthly by the tenth of each month
- b. Program Performance Report (PPR) due October by the tenth of the month

#### 2. DUE DATES

**All reports are due in the DAAA office on the tenth of the month following the end of the report period. If the tenth falls on a day the DAAA is closed, the reports are due the first working day thereafter.** Failure to provide accurate and timely reports will delay reimbursement and may lead to probationary status, as defined in the contract.

### F. PROGRAM DOCUMENTATION REVIEW

DAAA will conduct a review of all documentation after the final month of service. The review will focus on all documentation related to the program.

The review may be conducted at the appropriate contractor site(s) or at the DAAA office.

The review is to ensure that contractors are providing and managing services in the best interests of both the clients being served and the taxpayers whose funds are supporting the service. It is both our responsibility and desire to help all contractors achieve this goal.

## **G. CONTRACT PERIOD**

In most cases, the contract will be executed for the period from July 1, 2017 through September 30, 2017. Unless the contract specifies such a part-year period, contractors must maintain the capacity to provide service during the entire contract period. Contractors providing levels of service below projected levels may be subject to a reduction of funding.

## **H. CONDITIONS AND DISCLAIMERS**

1. All funding allocations and planned levels of services are exclusively for the Planning and Service Area (PSA) of the Detroit Area Agency on Aging.
2. DAAA will accept no fiscal responsibility for costs related to the preparation of any proposal. Contracted levels of service are not to be adversely affected by proposal preparation.
3. All copies of proposals become the property of DAAA upon submission. Proposals will be available for public inspection upon selection of contractors by the Board of Directors of DAAA unless an applicant demonstrates that DAAA is obligated to maintain confidentiality. At the time of submission, the applicant must designate and label all confidential material and submit a statement as to why it is confidential. All requests for continued confidentiality are subject to approval of DAAA.
4. Procurement of all equipment and supplies for a service under contract with DAAA will be the responsibility of the applicant. Title to all equipment with costs in excess of \$5,000 and with a useful life of more than one year will remain with the State of Michigan. At the conclusion of the contract period of any contractor whose contract is not renewed in whole or in part by DAAA, any equipment purchased under any current or prior contract with DAAA shall be subject to repossession or redistribution by the state of Michigan or its authorized agent.

## **I. NON-DISCRIMINATION/FACILITY COMPLIANCE**

Applicant agencies must assure compliance with the following:

### **Civil Rights Compliance**

Programs must not discriminate against any employee, applicant for employment, or recipient of service because of race, color, religion, national origin, age, sex, height, weight, or marital status. Each program must complete an appropriate MDHHS (Federal Department of Health and Human Services) form assuring compliance with the Civil Rights Act of 1964. Each program must clearly post signs at agency offices and locations where services are provided in English and other languages as may be appropriate, indicating non-discrimination in hiring, employment practices, and provision of services.

### **Equal Employment**

Each program must comply with equal employment opportunity and affirmative action principles.

**Universal Precautions**

Each program must evaluate the occupational exposure of employees to blood or other potentially hazardous materials that may result from performance of the employee's duties and establish appropriate universal precautions. Each provider with employees who may experience occupational exposure must develop an exposure control plan, which complies with Federal regulations implementing the Occupational Safety and Health Act.

**Drug Free Workplace**

Each program must agree to provide drug-free workplaces as a precondition to receiving a federal grant. Each program must operate in compliance with the Drug-Free Workplace Act of 1988.

**Americans with Disabilities Act**

Each program must operate in compliance with the Americans with Disabilities Act.

**Workplace Safety**

Each program must operate in compliance with the Michigan Occupational Safety and Health Act (MIOSHA). Information regarding compliance can be found at [www.michigan.gov](http://www.michigan.gov).

**J. DEBARMENT AND SUSPENSION**

With the completion of this application, the prospective recipient certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

**K. AUDIT PROVISIONS**

Successful applicants must, under certain circumstances, arrange to pay for audits of their organizations and programs. Therefore, it is important that each applicant determine what audits will be required and provide sufficient funds in its budget if it must conduct audits. Information relative to audit requirements may be obtained from your accountant, the IRS, and/or the DAAA Finance Department.

**L. INSURANCE**

The Applicant Agency, at its expense, must maintain during the term of the contract the following insurance:

- A. Workers' Compensation Insurance which meets Michigan statutory requirements. Employers' Liability coverage with limits of \$500,000 each employee for bodily injury by accident, and \$500,000 each employee for bodily injury by disease.
- B. Commercial General Liability Insurance with minimum limits, for bodily injury and property damage, of \$2,000,000 per occurrence and \$2,000,000 in the aggregate including products/completed operations, premises, and advertising injury/personal

injury coverages.

- C. Commercial Automobile Liability owned, non-owned, and leased vehicles, with minimum combined single limits of \$1,000,000.
  - D. Umbrella or Excess Liability Insurance with limits of at least \$2,000,000 that provides coverage over primary policies.
- All insurance must be affected under valid and enforceable policies and underwritten by an insurance company with an A.M. Best Company rating of A- or above.
  - Insurance policies must name the DAAA as an additional insured and loss payee, and must not be canceled or materially changed without at least 30 days prior notice from the Applicant Agency to the DAAA. The Applicant Agency must submit all certificates evidencing insurance to the Risk Management Division at the time the Applicant Agency executes the contract, and at least 15 days prior to the expiration dates of expiring policies.
  - If, during the term of the contract, changed conditions or other pertinent factors occur which in the reasonable judgment of the DAAA render inadequate the insurance limits, the Applicant Agency will furnish on demand such additional coverage as may reasonable be required and available under the circumstances, issued by recognized, responsible Michigan insurers which are well-rated by national rating organizations.

#### Indemnification

- Except for claims arising from the DAAA's gross negligence, the Applicant Agency agrees to indemnify, defend, and save harmless the DAAA against, and from any and all liabilities, obligations, damages, penalties, claims, costs, charges, and expenses (including, without limitation, fees and expenses of attorneys, expert witnesses, and other consultants) which may be imposed upon, incurred by, or asserted against the DAAA because of any of the following occurring during the term of the contract:
- The Applicant Agency agrees that it is its responsibility and not the responsibility of the DAAA to safeguard the property and materials that the employees of the Applicant Agency use in performing the contract. The Applicant Agency must hold the DAAA harmless for costs and expenses resulting from any loss of the property and materials used by its employees pursuant to the performance of the Applicant Agency under the contract.
- Nothing in the contract shall be deemed to relieve the Applicant Agency of its duty to defend the DAAA, as specified, pending a determination of the respective liabilities of the Applicant Agency and the DAAA, by legal proceeding or agreement. The DAAA shall cooperate with the Applicant Agency in the defense against the suit. In no event shall the Applicant Agency make any admission of guilt or liability on behalf of the DAAA without the DAAA's prior, written consent.
- For purposes of the contract, the term "DAAA" includes the Detroit Area Agency on Aging and all other associated, affiliated, or subsidiary departments or divisions now existing or to be created, their agents and employees.
- This indemnity applies without regard to whether the claims, damage, liability, or expense is based on breach of contract, breach of warranty, negligence, strict liability, or other tort. This indemnity survives delivery and acceptance of services.



The applicant agency shall furnish the DAAA with a certificate of insurance showing the limits of liability, policy dates and insurance carrier (see page A - 6 of the Bid Application).

**M. APPEALS PROCEDURES**

**DAAA's Appeals Procedure** will be sent to all unsuccessful bidders and is available upon request at the DAAA office.

**N. HIPAA REQUIREMENTS**

Agencies that receive funding from the Detroit Area Agency on Aging are required to be in compliance with the Health Insurance Portability and Accountability Act (HIPAA). Specific requirements are described in the Business Associate Agreement that is to be signed and attached to the application as indicated in the application instructions.

**O. LEGAL REFERENCES**

The following is a list of applicable legal references:

- AASA-MS Aging and Adult Services Agency minimum standards (pertinent parts are enclosed). Specific citations are coded as follows:
  - AASA-MS-General General Requirements for All Service Programs
  - AASA-MS-Access General Requirements of Access Service Programs
  - AASA-MS-In-Home General Requirements of In-Home Service Programs
  - AASA-MS-(Letter)-(Number) Service Definitions and Specific Minimum Standards for each service, subdivided into Access (letter "A"), In-Home (letters "B") and Community (letter "C").
  - AASA-OSAAA Operating Standards for Area Agencies on Aging, specifically:
    - AASA-OSAAA-C-4 Contracting for Service Provision (referenced in AASA-MS-General #1).

All of these materials are available for inspection and copying (at a nominal cost) at the DAAA office. Most local libraries should have at least the Federal materials.

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## APPLICATION INSTRUCTIONS

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The application packet has been designed to standardize and expedite the review of your grant application. **No other format will be accepted.** Long or elaborate responses will not enhance the prospects of approval. Unless otherwise required by instructions, we urge constraint in attaching extra sheets or paper to answer these questions. If, however, additional pages are needed as an attachment to a particular form, these pages may be added.

**Each applicant agency is only required to submit the *Section I: Agency Information* packet once for this RFP.**

**A separate *Section II: Program Information* section of the application must be submitted for each service category for which a bidder is applying.**

### SECTION I: AGENCY INFORMATION

#### **SECTION I - COVER SHEET**

Complete the application cover sheet, page A-1, with agency information.

#### **ASSURANCES AND COMPLIANCE WITH APPLICABLE LAWS/REGULATIONS**

The forms on page A - 2 and A - 3 should be reviewed and signed by the person duly authorized to conduct the agency's legal responsibilities.

#### **ASSURANCE OF COMPLIANCE WITH TAX REQUIREMENTS**

Complete the table on page A - 4 according to the instructions provided on the page. If necessary, attach additional information directly behind page A-4. Sign the page.

#### **MINORITY CONTRACTOR STATUS/BOARD OF DIRECTORS**

1. Indicate whether or not your agency is a minority contractor using the designated criteria on page A - 5.
2. Indicate the total number of Directors on the Board and the frequency of meetings.
3. List the board members, noting those who are minority with an asterisk (\*) and their credentials. Provide copies of the minutes from the last three (3) board meetings labeled as **Attachment A** at the end of the *Section I: Agency Information* portion of the proposal.

## **INSURANCE**

Indicate on the chart on page A - 6 the amount of insurance coverage that the applicant agency has. Attach copies of the cover page for each type of insurance, to be included as **Attachment B** at the end of the *Section I: Agency Information* portion of the proposal. If the agency does not currently have the minimum requirements, indicate intent to purchase the required insurance upon notice of a grant award.

## **AGENCY INFORMATION NARRATIVE**

Provide a concise narrative addressing each question on pages A - 7 through A - 9. Long or elaborate responses will not enhance the prospects of approval. Unless otherwise required by instructions, we urge constraint in attaching extra sheets or paper to answer these questions. Label the narrative as **Attachment C**.

### **Agency Profile**

Provide a brief description of the agency's background, mission, length of operations, experience in serving the target population, experience providing the proposed service(s), and total services offered. Include an organizational chart as **Attachment D** at the end of the *Section I: Agency Information* portion of the proposal.

### **Financial Management**

Provide a description of the agency's financial management of the agency. Include details regarding any audit findings as **Attachment E** at the end of the *Section I: Agency Information* portion of the proposal. Also include a copy of the certified audit (or financial statements) as **Attachment F**; IRS Form 941 with proof of payment as **Attachment G**; IRS Form 990 or 1120 as **Attachment H**; agency's 501 c (3) notification letter as **Attachment I**; and a copy of the most recent Annual Report as **Attachment J**.

### **Agency Administration**

Provide a description of the agency's administrative capabilities, by answering each question concisely. Attach copies of resumes of management to demonstrate experience and qualifications at the end of the application as **Attachment K**.

## **BUSINESS ASSOCIATE AGREEMENT**

Attach a completed and signed copy of the Business Associate Agreement (Appendix A) to assure compliance with the Health Insurance Portability and Accountability Act (HIPAA) as **Attachment L**.

## **SECTION II: PROGRAM INFORMATION**

**REMINDER: Complete additional Section II – Program Information packets in their entirety for each separate service category!**

### **SECTION II - COVER SHEET**

Complete the program information cover sheet on page A - 10. Be sure to indicate the appropriate Service Category and the amount of funding requested. Note the number of clients to be served and the number of units to be provided. Refer to the specific service definitions in the RFP Instructions for the definition of a unit of service.

### **PROGRAM NARRATIVE**

Provide a concise narrative addressing each question on pages A - 11 through A - 12. Long or elaborate responses will not enhance the prospects of approval. Unless otherwise required by instructions, we urge constraint in attaching extra sheets or paper to answer these questions. Label the narrative as Attachment 1 at the end of the *Section II: Program Information* portion of the proposal.

#### **Statement of Need**

Clearly state the specific need the proposed project will address. Demonstrate an understanding of how the proposed project will impact needs.

#### **Service/Program Description**

1. **OVERVIEW** – State the service to be delivered by your project to meet the need stated under Statement of Need. In completing this section, it is recommended that you reference the applicable service definition. Within the stated guidelines, please keep in mind that we are asking for a description of your proposed services and programs.
2. **PROGRAM DESIGN** – Provide clear, concise responses to all the items listed. Additional information is requested for specific service categories only (as indicated).
3. **COMMUNITY TO BE SERVED** – If not serving the entire PSA, provide a sketch of a map showing the exact boundaries where your service(s) will be provided. Include this map as Attachment 2 at the end of the *Section I: Program Information* portion of the proposal.
4. **TARGET POPULATION** – Plans for targeting frail, low-income, minority, and disabled older adults should be clearly developed and stated. Also, the statement must assure that elderly members of Native American tribes and organizations will be provided access to services.

**NOTE:** Successful applicants will be required to provide a comprehensive work plan

including goals, objectives, and time lines.

**Project Management and Staffing**

Provide detailed management plans that clearly delineate each program member's area of responsibility and how key staff will be accountable for carrying out their responsibilities. Include job descriptions as **Attachment 3** at the end of the *Section I: Program Information* portion of the proposal. Describe the management and direct service experience of the program staff. Describe the duties and qualifications of current staff and of any staff to be filled.

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## GENERAL BUDGET INFORMATION

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### A. ELIGIBLE AND INELIGIBLE EXPENSES

#### 1. Eligible Expenses

The following list indicates generally allowable cost categories for which Title III funds may be expended:

Advertising	Meeting Costs
Communications	Printing and Reproduction
Compensation for Personnel	Professional Services
Services (such as wages, salaries, and employee fringe benefits)	Training and Education
Insurance and Indemnification	Travel
Material Costs	Volunteer Reimbursement Expenses

#### 2. Ineligible Expenses

Ineligible costs are generally the following:

Bad Debts	Labor Relations Costs
Construction	Losses
Contingencies and Miscellaneous Expenses	Organization Costs
Contributions and Donations	Purchase of Vehicles
Fines and Penalties	Relocation Costs
Interest and Other Financial Costs	Severance Pay

### B. INDIRECT COSTS

Indirect costs are also ineligible. While it is recognized that MDHHS does permit such costs, with regard to the administration of Title III programs, MDHHS policy also permits individual state discretion on determining the eligibility of claiming such costs.

For the State of Michigan, the Commission on Services to the Aging has adopted a policy that does not permit an applicant agency to claim indirect costs to carry out the operation of a Title III funded project. Examples may include, but are not limited to, executive salaries, accounting, auditing, and budgeting salaries, clerical, receptionist, switchboard, and other clerical service salaries.

If an applicant agency is awarded a grant but does not keep adequate and detailed time records of these expenses, DAAA will declare such expenses as indirect costs and will disallow them.

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## LINE ITEM BUDGET INSTRUCTIONS

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**READ THE FOLLOWING INSTRUCTIONS IN THEIR ENTIRETY BEFORE COMPLETING THE BUDGET FORMS.**

**Complete the Supporting Budget Schedules BEFORE completing the Budget Summary.**

The Supporting Budget Schedules are designed to relate line item costs (listed under Budget Category) with the activities to be undertaken by the project during the proposed budget year.

### **BUDGET CATEGORIES (BY LINE ITEMS)**

#### **1. SALARY**

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.*

#### **2. FRINGE BENEFITS**

This category is to include the employer's contributions for insurance, retirement, FICA, unemployment insurance, and other similar benefits for all permanent and part-time employees. For each position listed under salaries.

#### **3. TRAVEL**

This category is to include the travel costs of all full-time and part-time employees, as well as volunteer reimbursements for travel. This includes costs for mileage, per diem, lodging, registration fees for approved seminars and conferences, and other travel costs incurred by employees.

#### **4. SUPPLIES**

This category is to be used for all consumable and short-term items (less than two years) or small equipment items consisting of less than five thousand dollars (\$5,000) per item. Costs related to the cost of training, education and workshops.

#### **5. CONSULTANTS**

This category is to include the cost of independent contractors (as defined by the Internal Revenue Service).

#### **6. OTHER COSTS**

This category is to include miscellaneous items such as speakers for trainings.

Describe the type of Other Cost.

**C. CHECKLIST**

A “Checklist for Application Submission” is provided on the following page for use upon completion of your application. Please review the items to make sure you have complied with all appropriate requirements listed on the checklist, and that the application you are submitting is complete. **Documents should be labeled as indicated in the application, and fastened together in the order listed on the checklist.**



## CHECKLIST FOR APPLICATION SUBMISSION

### **DOCUMENTS MUST BE SUBMITTED IN THE ORDER BELOW**

*If an attachment is not applicable, insert a blank page labeled as the appropriate attachment and indicate that it is not applicable. **Proposals AND copies MUST contain all the attachments listed.***

<b>REQUIRED DOCUMENTS</b>	<b>X</b>	<b>LABEL</b>
<b>SECTION I: AGENCY – (fasten documents together)</b>		
A typed original and three copies (total of 4) of <i>Section I: Agency Information</i> .		Pages A - 1 through A - 6
Copy of minutes from last 3 board meetings		<i>Attachment A</i>
Copy of cover page from applicable insurances, indicating coverage amounts.		<i>Attachment B</i>
Agency information narrative		<i>Attachment C</i>
Agency organizational chart.		<i>Attachment D</i>
Details of previous audit findings and resolution. If applicable		<i>Attachment E</i>
Certified audit (or specified financial statements if no certified audit).		<i>Attachment F</i>
Copy of IRS Form 941 with proof of payment.		<i>Attachment G</i>
Copy of current IRS Form 990		<i>Attachment H</i>
Copy of 501 c (3) notification letter. If applicable		<i>Attachment I</i>
Copy of most recent Annual Report. If applicable		<i>Attachment J</i>
Resumes of management staff (include with original & copies)		<i>Attachment K</i>
Completed and signed Business Associate Agreement (Appendix A).		<i>Attachment L</i>
<b>SECTION II: PROGRAM – (fasten documents together)</b>		
A typed original and three copies (total of 4) of <i>Section II: Program Information</i> .		Page A-10
Program narrative (Include flow chart and logic model )		<i>Attachment 1</i>
If not serving entire PSA, include map with street boundaries and zip codes indicated.		<i>Attachment 2</i>
Job descriptions of key program management & professional staff.		<i>Attachment 3</i>
Line Item Budget		<i>Attachment 4</i>
<b>FINAL REVIEW PRIOR TO SUBMISSION</b>		
Submitted proposal(s) are for published service categories as indicated in this RFP?		
Proposal(s) reviewed for technical accuracy?		
All applicable questions answered and application complete?		
Required signatures on all documents?		
Proposal and 3 copies assembled in the order, and fastened, as outlined above?		