



OLDER AMERICANS ACT
TITLE III

2023 Title III Request for Proposals

For Title III- D Evidence-Based Health Promotion and
Disease Prevention Programs to Begin in 2024

Applications due
June 23, 2023



TRELLIS™

Area Agency on Aging

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FOR ORGANIZATIONS

2023 Older American Act Funding for Evidence-Based Health Promotion and Disease Prevention Programs

Applications open on May 8, 2023; proposals are due June 23, 2023

Introduction

Trellis is the Area Agency on Aging for the seven-county Twin Cities metro area. In this role, Trellis administers federal Older Americans Act (OAA) funding for services that help older adults and caregivers live safely and independently in their communities.

The Minnesota Board on Aging (MBA), the State Unit on Aging, allocates OAA funding to Area Agencies on Aging (AAAs), including Trellis, to implement OAA services in their designated areas. In addition, the MBA further develops statewide policies for OAA funded programs.

Trellis is inviting proposals for OAA Title III-D services to begin on January 1, 2024:

Evidence-Based Health Promotion and Disease Prevention (Title III-D)

Providers of this service offer evidence-based programs to educate older adults and caregivers about chronic diseases and provide prevention-focused public health on topics like reducing falls, managing chronic pain, weight loss and stress management.

We're Taking Action on Our Commitment to Equity

Trellis is committed to making the Title III application process accessible to organizations serving people facing disparities, including those serving communities of color and older adults with low incomes.

*Trellis' mission is to **assist individuals to age well and build the capacity of communities to care for an aging population.** Our management of federal Older Americans Act funding, known as Title III, is one of our most important strategies for fulfilling this mission. Title III services help older adults age in their communities by providing funding for the services individuals need to age at home and the information communities need to support older adults.*

We're taking action on our commitment to equity.

- Trellis is committed to reducing disparities in access to funding and services and to ensuring equity and inclusivity.
- The 2023 Request for Proposals is an open invitation to all nonprofits, for-profit and government entities serving older adults in the seven-county metro area, and we've updated our processes to make funding more accessible and inclusive.

We're making funding for all OAA services available at one time.

- This will make it possible for organizations to apply for funding to support a comprehensive set of services to older adults that provide for their overall well-being.

Get Assistance

We are available to assist you in applying for these funds. If you have a question or need help, we are available to provide technical assistance to prospective applicants and would like to hear from you! We encourage you to attend one of two applicant conferences, visit with our staff at a weekly virtual open house, or email your question to title3@trellisconnects.org.

- **Applicant Conferences** –
 - May 17, 2023, from 2:00 to 3:00 PM – [Click here to join the meeting](#).
 - May 23, 2023, from 8:30 to 10:00 AM – [Click here to join the meeting](#).
- **Weekly technical assistance Open Houses** – Visit our [website](#) for virtual meeting links.
- **Submit questions in writing** to title3@trellisconnects.org through June 16, 2023. All questions received in written form will be answered and posted to the website for all to review. In fairness to all applicants, questions, and responses from applicant conferences and technical assistance sessions will also be posted online. Trellis will not identify the source of the question in our posting.

About the Funding

Older Americans Act (OAA) Title III-D programs are available to older adults age 60 or over. Evidence-Based Health Promotion and Disease Prevention programs are available to all older adults and caregivers regardless of their income or ability to contribute to the service. Proposal budget minimums for Title III-D funding is \$5,000.

In 2023, Trellis awarded \$10.7 million in [OAA funding to community organizations](#) for services such as home-delivered meals, transportation, caregiver support, respite, evidence-based health promotion programs and more.

Service Area

Trellis will award OAA Title III-D Evidence-Based Health Promotion and Disease Prevention funding to selected applicants who provide services to eligible participants in Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, and Washington counties. No minimum service area is required, and multi-county service areas are permitted. Applicants based outside of the seven-county metro may apply for funds to provide services in a manner that is reasonably convenient to the service recipient.

Trellis staff, with the Trellis Board of Directors' approval, will negotiate service boundaries with awarded applicants during contract negotiations (see [Application Timeline](#)).

Target Population

Proposed services must be targeted to people age 60 and older in greatest need of services with particular attention to: low-income older adults, minority older individuals, older individuals with limited English proficiency, and older adults at risk for institutional placement. Services must be person-centered, sensitive to cultural differences, and responsive to the changing needs of communities.

Applicant Eligibility

Eligible Applicants

Nonprofit and for-profit organizations and units of government who have experience in providing the services outlined in this RFP are eligible to apply. Trellis is required to obtain a waiver from the [Minnesota Board on Aging](#) (MBA) prior to funding for-profit organizations. Waivers for funding for-profit organizations are generally reviewed and voted on by MBA members in October.

Applicants may, and are encouraged, to partner with other nutrition service providers to meet the needs of a broader target population in the applicant's proposed service area.

Applicants are encouraged to apply for any and all services available through Trellis' OAA Title III Request for Proposals. One application and budget are required for each proposed service under Title III-B, Title III-C, Title III-D, and Title III-E (see [Title III Service Definitions on our website](#)). There is no minimum or maximum number of services for which applicants must apply.

Organization Capacity

Services proposed in the application must reflect services the applicant organization has the capacity to provide. Reviewers and Trellis staff will determine capacity, for purposes of the award, based on the applicant's submitted proposal. Modification of the proposal will only be accepted if requested by Trellis.

Applicants must complete and submit all [required documents](#) with their proposal. Upon receiving a Title III award, successful applicants must ensure all sub recipients meet the requirements of [2 CFR 200.332](#).

Any misrepresentation within the proposal is grounds for disqualification from the review process.

Award Information

Funding Period

Awarded applicants will be eligible to receive OAA funds for calendar years 2024 through 2026. Funds will be awarded to selected applicants annually. The initial period of the funding

agreement is January 1, 2024 – December 31, 2024. Renewal for calendar years 2025 and 2026 is contingent upon acceptable performance, availability of OAA funds, and agreement of terms between Trellis and the awarded applicant.

Available Funds

A total of **\$245,350** is available for Title III-D Evidence-Based Health Promotion and Disease Prevention services in 2024. Because the American Rescue Plan Act (ARPA) funds end on September 30, 2024, Trellis is projected to have \$88,732 less in OAA Title III-D funding, which will result in lower Title III-D funding levels beginning in 2025.

2024 - \$245,350

2025 - \$156,618

2026 - \$156,618

Match Requirements

Awarded applicants that receive federal Title III-D funding are not required to contribute matching funds.

Cost Sharing and Client Contributions

[Older Americans Act regulations](#) require that every older adult be offered the opportunity to financially contribute to a service. Cost sharing is one way to contribute. Cost share contributions are based on a sliding fee scale using an older adult's income and the cost of the service provided.

Typically, older adults make voluntary contributions through methods such as a donation box or by mail. Revenue generated from cost sharing or contributions are intended to supplement the cost of service delivery and expand the service. Awarded applicants will be asked to follow our [Cost Share and Voluntary Contribution Policy](#).

Regardless of the contribution method, awarded applicants must deliver services regardless of an older adult's ability to contribute to the service.

How Trellis Reimburses for Delivery of Title III Services

Awarded applicants are reimbursed on a monthly or quarterly basis for services and expenditures from the previous month or quarter. Payment is based on the reports submitted from January through December. Reports include the following required information:

1. Eligible expenses (verified as eligible through the budget negotiation process)
2. Revenue generated from cost share or client contributions
3. Other cash from non-federal sources used in the program (e.g., foundation funding)
4. Persons served data (some services require entry of person served data in the state mandated system, [PeerPlace](#))

5. Units of service provided (see [service definitions for unit definitions](#))
6. Number of people on a waitlist (if applicable)

Awarded applicants will have an opportunity to negotiate final budgets that reflect costs needed to support program delivery, with a goal for service rates to fall within the rate range (included in the [service definition document](#)). While payment is not based on unit rates, it serves as a guidepost to create consistency of service rates across the region.

Awarded applicants may request an advance of up to 15% of the Title III-D award amount at the beginning of the calendar year.

What We Will Fund in This Funding Cycle

Trellis invites proposals for Title III-D Evidence-Based Health Promotion and Disease Prevention programs. [See a detailed description of the Evidence-Based Health Promotion classes and the unit cost rate ranges per class.](#)

Title III-D services are considered Unregistered Services. Although Unregistered Services are not required to complete a NAPIS form and utilize PeerPlace, awarded applicants will be required to submit generic demographic information about the people served during the previous month/quarter. Awarded applicants are responsible for ensuring the eligibility of the service participant for reimbursement.

Description of Programs

Evidence-Based Health Promotion and Disease Prevention (Title III-D)

Providers of this service offer [evidence-based programs](#) to educate older adults and caregivers about chronic diseases and provide prevention-focused public health on topics like reducing falls, managing chronic pain, weight loss and stress management.

Trellis seeks proposals for the following Title III-D Programs:

1. Aging Mastery Program (AMP)
2. Bingocize
3. Diabetes Prevention Program
4. FallsTalk
5. Living Well with Diabetes
6. Living Well with Chronic Conditions
7. Living Well with Chronic Pain
8. Matter of Balance (MOB)
9. Powerful Tools for Caregivers (PTC) - This program can also be supported by Title III-E funding.
10. Program to Encourage Active, Rewarding Lives (PEARLS)
11. Stay Active and Independent for Life (SAIL)
12. Stepping On
13. Tai Ji Quan: Moving for Better Balance

14. Walk with Ease

Our Funding Priorities

The table below lists our funding priorities with a description and score for how applications will be considered. Reviewers will provide scores for every service proposed in the Title III-D Funding Application.

Priority	Description	Score
Feasibility	Proposal clearly articulates how money will be used to deliver services. Applicant demonstrates ability to manage federal funds and a history of meeting service outcomes in proposed program(s). Additionally, applicant demonstrates strong referral and outreach partnerships in proposed community.	35%
Community Connection	Proposal clearly describes how the community served provided input on the services proposed, or how the community will be engaged in finalizing the service and delivery approach. Applicant should also show how they have engaged or plan to engage older adults in defining their needs to give an understanding of older adults in your community.	30%
Impact	Proposal clearly articulates how services will impact the lives of older adults and any strategies the applicant will employ to leverage Title III funds for added impact.	15%
Equity	Proposal clearly expresses how services or activities address inequities and disparities in BIPOC communities	15%
Leadership	Proposal describes how program staff and organizational leadership reflect communities served	5%

Application Timeline

The following timeline includes key dates for the RFP application process at Trellis:

<p>May 8 Publish Request for Proposals</p>
<p>May 17 and May 23 Applicant Conferences</p> <p>Webinars will provide an overview of Trellis, clarification on the funding and services and instructions for completing the application and budget. Pre-registration is not required.</p> <p>May 17 Applicant Conference: Join the July 20 Applicant Webinar Meeting ID: 885 7199 8671 Passcode: 251310 Call-In Option: (651) 372-8299</p> <p>May 23 Applicant Conference: Join the July 20 Applicant Webinar Meeting ID: 849 2884 5023 Passcode: 795742 Call-In Option: (651)372-8299</p>
<p>May 17 through June 14 May 17 through June 14 - 1:00 to 2:00 Virtual Applicant Technical Assistance Open Houses Meeting ID: 848 4156 8837 Passcode: 614878 Call-in Option: 651-372-8299</p> <p>May 22 May 30 June 5 June 12 June 14</p>
<p>June 8 Deadline to submit Applicant Interest Form (optional)</p> <p>Trellis would like to hear from organizations that are interested in applying for Title III funding. We will use this information to support interested applicants and connect with service organizations outside of Title III funding for future collaboration opportunities. As Trellis works to be an equitable funder of services, we may reach out to organizations for feedback on our updated process to continue to improve on our goal for equitable access to Title III services and funding. Submit an Applicant Interest Form.</p>
<p>June 16</p>

Last day to submit questions
June 23 Proposals due
October 30 Applicants informed of funding decisions
October 31 – December 20 2024 Award negotiations
January 1, 2024 Funding and services begin

Information for Applicants

General Provisions

Services outlined in the OAA Title III-D Funding Application must reflect the needs of older persons to be served, be person-centered, responsive to cultural preferences, demonstrate service to the target population, and be responsive to the dynamic needs of communities in the service area.

Applicants must design service delivery systems that are cost-effective, responsive to the needs of older people and provide equitable services, assuring fair and non-discriminatory practices.

Applicants must implement services in accordance with the standards outlined in this RFP unless Trellis grants an applicant a temporary or permanent waiver. Applicants seeking an exemption must include this request in their proposal.

Participant Eligibility and Target Population

A means test may not be used to determine eligibility for programs funded under Title III of the OAA.

Applicants must provide all participants with the option to contribute to the cost of the service(s) provided. Services may not be denied to an eligible participant based on their willingness or ability to contribute towards the cost of the meal.

Target Populations

The OAA requires targeting services to older adults with the greatest economic and social need and who are at risk for institutional placement.

The OAA, the MBA, and Trellis have implemented targeting policies OAA Title III services. These policies state that providers must give priority to eligible individuals with incomes at or below 200% of the [federal poverty guideline](#) and who meet at least one of the following criteria:

- Is a member of a diverse population
- Has limited English proficiency
- Is at risk of institutional placement

Trade Secrets

Pursuant to [Minnesota Statute § 13.599](#), responses to Requests for Proposals (RFP) are public information “after a granting agency has completed the evaluation process” with the exception of “trade secret data” as defined and classified in [Minn. Stat. § 13.37\(b\)](#), which reads:

“(b) "Trade secret information" means government data, including a formula, pattern, compilation, program, device, method, technique or process (1) that was supplied by the affected individual or organization, (2) that is the subject of efforts by the individual or organization that are reasonable under the circumstances to maintain its secrecy, and (3) that derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.”

Applicants submitting proposals under this RFP may mark submitted information as “trade secret information” under this statute. Such information will be kept secret pursuant to the law. Please indicate location and content of trade secret information in a cover page to the proposal narrative.

OAA Assurances and Certifications

Awarded applicants must accept the terms and conditions in the [Older Americans Act Assurances and Certifications](#) as a condition of the award.

Selection Process

Trellis will convene a review committee comprised of community members and members of Trellis’ Board of Directors. Board members that participate in the review will carry the funding and service recommendations of the review committee to the full Board of Directors.

Trellis’ Board of Directors, at its sole discretion, will select the proposals and services within the proposal that best meet the needs of the population served, Trellis’ funding priorities, target population and service area. Trellis will notify all applicants of the funding decision and services in writing. Unsuccessful applicants have the right to appeal in accordance with Trellis’ appeal process.

Trellis has the discretion to not fund all proposed services within an application or award proposals at the requested amount. The review committee will review proposals and make recommendations for funding services that align with Trellis priorities.

Example: ABC Organization applies for Matter of Balance, Tai Ji Quan, and SAIL. The review committee awards ABC Organization funding for Matter of Balance and Tai Ji Quan, but not for SAIL.

An OAA Grant Manager will reach out to awarded applicants to negotiate a final budget and service outcomes.

Award Process and Reporting Requirements

If your organization is awarded funding, Trellis will create an award that includes a description of the services, state and federal funding rules, and administrative and financial terms and conditions. The proposal will become a binding component of the agreement.

Awarded applicants must maintain financial systems and procedures in accordance with federal regulation [45 CFR Part 75.302](#) and must submit reports to Trellis on a quarterly basis using PeerPlace and other reporting mechanisms.

For Awarded Applicants

Awarded applicants must agree to obtain the information and documents below as part of the final Title III-D award with Trellis:

1. [Insurance Certification Limits for Awarded Applicants](#)
2. [Cost Share and Contribution Policy](#) (Sample Policy and sliding fee scales available in Trellis' Cost Share and Voluntary Contribution Policy)
3. **Client Complaint Policy and Procedure**
4. **Targeting Policy**
5. [OAA Assurances and Certifications](#)
6. **Full Title III Budget**
7. **Board of Directors with Terms**
8. **PeerPlace Memorandum of Understanding** (Title III Persons Served Database for registered services)

Title III-D Evidence-Based Health Promotion and Disease Prevention Funding Application

[OAA Title III-D Funding Application](#)

[OAA Title III-D Budget](#)

Complete Application Checklist (what needs to be included)

Please reach out to Trellis staff at title3@trellisconnects.org if you have questions about how to obtain or complete these required documents.

- Application (includes organization information and narrative)
- Budget and persons served
- Organization chart
- IRS Tax Exempt Letter
- Indirect cost rate (if a federally approved rate)

- 501(c)(3) incorporation, if a non-profit
- Insurance certification (allowable if not at required limits)
- Latest financial audit, or financial statements

Submit your completed application and supporting documents to title3@trellisconnects.org