



OLDER AMERICANS ACT
TITLE III

2023 Title III Request for Proposals

For Title III-E National Family Caregivers Services to Begin
in 2024

Applications due
June 23, 2023



TRELLIS™

Area Agency on Aging

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FOR ORGANIZATIONS

2023 Title III-E Older Americans Act Funding for Family Caregiver Support Services

Application period opens May 8; proposals are due June 23

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 develops statewide policies for OAA funded programs.

Trellis is inviting proposals for OAA Title III-E services for service delivery to begin on January 1, 2024. These services target the following eligibility categories:

1. **Caregivers (age 18 and older) Caring for an Older Person**

Adult family members or other individuals 18 years of age and older, who are informal providers of in-home and community care to an individual who is 60 years of age or older, or an individual (of any age) with Alzheimer's disease or related disorder with neurological and organic brain dysfunction.

2. **Older Relative Caregivers (e.g. Grandparents raising grandchildren, Kinship caregivers)**

Caregivers who are a grandparent or an older individual who is a relative caregiver of a child, not more than 18 years of age or who is an individual (19-59 years of age) with a disability. A caregiver can include a grandparent, step-grandparent, or relative of a child by blood, marriage or adoption, who is 55 years or older and who:

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

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 in place 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

Trellis seeks innovative proposals of caregiver support services for the Older Americans Act target population. Proposal budget minimums for OAA Title III-E funding is \$50,000.

Older Americans Act (OAA) funding makes services available to caregivers over the age of 18 who care for someone that is 60 years of age or older (with the exception of those living with Alzheimer's or memory loss), or older relative caregivers who are 55 years of age or older and caring for a child under the age of 18, or an adult (19-59) with a disability. Services are available to all caregivers regardless of their income or ability to contribute to the service.

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

Service Area

Trellis will award OAA Title III-E National Family Caregiver Support Program Service funding to selected applicants who provide services to eligible caregivers 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 caregivers in greatest need of services with particular attention to the following groups: low-income caregivers, minority caregivers, or caregivers caring for a minority older adult, caregivers with limited English proficiency, and caregivers for 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 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 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.

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.

Award Information

Available Funds

A total of **\$1,284,395** is available for Title III-E National Family Caregiver Support Services in 2024. Because the American Rescue Plan Act (ARPA) funds end on September 30, 2024, Trellis is projected to have \$256,316 less in OAA Title III-E funding and will result in lower funding Title III-B funding levels beginning in 2025.

2024 - \$1,284,395

2025 - \$1,028,079

2026 - \$1,028,079

The Trellis Board of Directors has approved the following distribution of available Title III-E funds for services for each year of this three-year award cycle:

1. Older Relative Caregivers (15%)
2. Counseling (14%)

3. Group Education (12%)
4. Information and Assistance (20%)
5. Support Groups (17%)
6. Respite (18%)
7. Public Information Services (4%)

Match Requirements

Awarded applicants that receive federal Title III-E funding for National Family Caregiver Support Program Services must contribute 25% in non-federal resources as match. Allowable match sources can include cash, the value of in-kind contributions such as volunteer time, or both. See the Title III-E 2023 RFP Budget for the definition of Non-Federal Match. The Title III Federal share earned under a Title III award may not exceed 75% of the total net ([CFR 200.306](#))

Cost Sharing and Client Contributions

[Older Americans Act regulations](#) require that every older adult be offered the opportunity to financially contribute to a service. Typically, older adults make voluntary contributions through methods such as a donation box or by mail. Revenue generated from voluntary contributions is intended to supplement the cost-of-service delivery and expand the service. Awarded applicants will be asked to agree to follow our [Cost Share and Voluntary Contribution Policy](#).

Regardless of the contribution method, awarded applicants must deliver services despite a caregiver'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-E award amount at the beginning of the calendar year.

What We Will Fund in This Funding Cycle

Trellis is inviting proposals for all Title III funding areas (Title III-B, Title III-C, III-D, and III-E funding categories), for services to begin on January 1, 2024. See a [detailed description of each service](#), unit definition, and service rates for more information. Trellis will publish four (4) separate RFPs, one for each service area. This Request for Proposal is only for III-E National Family Caregiver Support Services (OAA Title III-E funding).

There is no maximum number of services for which applicants must apply, though awarded applicants may not be funded for all proposed services (see [“Selection Process”](#) below).

Example: ABC Organization applies for Support Groups, Caregiver Training and Education, and Public Information Services. The review committee awards ABC Organization funding for Support Groups, but not for the other services.

Some Title III-E National Family Caregiver Support Program Services are considered registered services that require a caregiver to complete a [National Aging Program Information System \(NAPIS\) form](#). Awarded applicants are required to enter client information (at minimum, name, and date of birth) into the State’s NAPIS system, called [PeerPlace](#), for reimbursement of Title III services.

Caregivers that complete a NAPIS form must agree on the usage of NAPIS data. The information from the NAPIS form will be used by the U.S. Health and Human Services Administration for Community Living (ACL), the Minnesota Board on Aging (MBA), and Trellis, to create statistical reports. ACL and the MBA may use the information to conduct a study and/or survey of the services for which NAPIS forms are used.

For individuals that receive Unregistered Services (e.g. Information and Assistance) a NAPIS form is not required, though providers are still required to submit generic demographic information around the people served during the previous quarter. Awarded applicants are responsible for ensuring the eligibility of the service participant for reimbursement.

Description of services

1. Caregiver Counseling

A service designed to support caregivers and assist them in their decision-making and problem solving. Counselors are service providers that are degreed and/or certified as required by state policy, trained to work with older adults and families and specifically to

understand and address the complex physical, behavioral and emotional problems related to their caregiver roles. Title III-E funded Caregiver Consultants will conduct a Caregiver Minimum Assessment with caregivers receiving ongoing support. Caregiver Consultants must meet the Minnesota Board on Aging Title III-E Caregiver Consultant Standards and Competencies (listed in the OAA Title III Assurances and Certifications). This includes counseling to individuals or group sessions. Counseling is a separate function apart from support group activities or training.

2. Caregiver Support Groups

A service that is led by a trained individual, moderator, or professional, as required by state policy, (moderators should have experience working with family, friends and/or neighbors caregiving and older adults, strong interpersonal skills, and access to regular supervision or consultation from a trained professional with comparable training or experience), to facilitate caregivers to discuss their common experiences and concerns and develop a mutual support system. Support groups are typically held on a regularly scheduled basis and may be conducted in person, over the telephone, or online. For the purposes of Title III-E funding, caregiver support groups would not include “caregiver education groups”, “peer-to-peer support groups”, or other groups primarily aimed at teaching skills or meeting on an informal basis without a facilitator that possesses training and/or credentials as required by state policy.

3. Caregiver Training

A service that provides caregivers with instruction to improve knowledge and performance of specific skills relating to their caregiving roles and responsibilities and builds caregiver capacity to provide, manage and cope with the caregiving role. Skills may include activities related to health, nutrition, and financial management; providing personal care; disease management; managing risk factors; mental health; navigating long-term care systems and communicating with health care providers and other family members. Training may include use of evidence-based programs; be conducted in-person or online and be provided in individual or group settings.

4. Respite

A service which offers temporary, substitute supports, care, supervision or living arrangements for care recipients. It provides a brief period of relief or rest for caregivers. Respite care includes (1) in-home respite; (2) out-of-home day respite; (3) out-of-home overnight respite; and (4) other respite.

In-home Respite: A respite service provided in the home of the caregiver or care receiver and allows the caregiver time away to do other activities. During such respite, other activities can occur which may offer additional support to either the caregiver or care receiver, including homemaker or personal care services. Trained volunteers may be utilized to provide companionship respite (e.g., assistance with meals, medication reminders and

general supervision). Respite volunteers are screened and trained, per Minnesota State Policy, and matched with older adults and supervised by provider.

Out-of-Home Day: A respite service provided in settings other than the caregiver/care receiver's home, including adult day care, senior center or other non-residential setting (in the case of older relatives raising children, day camps), where an overnight stay does not occur that allows the caregiver time away to do other activities. This option may be provided on a group or individual basis and includes licensed Adult Day Services, licensed adult foster care, a senior center, services by a family, friend, neighbor, or volunteer in a non licensed private residence, or escorted transportation to medical appointments or community activities.

Out-of-Home Overnight: A respite service provided in residential settings such as nursing homes, assisted living facilities, and adult foster homes (or, in the case of older relatives raising children, summer camps), in which the care receiver resides in the facility (on a temporary basis) for a full 24 hour period of time. This includes services provided in a licensed nursing facility, hospital, or registered housing site that has services provided by a licensed home care agency. The service provides the caregiver with time away to do other activities.

Other Respite: A respite service provided using Older Americans Act funds in whole or in part, that does not fall into the previously defined respite service categories. Services must contain structured activities, facilitated by an experienced individual. Services may include: virtual respite (may include but is not limited to virtual reality (VR) experiences, virtual tours, and virtual concerts, customized experiences, interactive storytelling ,music activities).

5. Public Information Services

A public and media activity that conveys information to caregivers about available statewide services, which can include an in-person interactive presentation to the public a booth/exhibit at a fair, conference, or other public event; and a radio, TV, or Web site event. Unlike Caregiver Assistance – Information and Assistance, this service is not tailored to the needs of the individual.

6. Information and Assistance

A service that links the individuals to opportunities and services that are available. To the maximum extent practicable, ensures that the individuals receive the services needed by the individuals, and are aware of the opportunities available to the individuals, by establishing adequate follow-up procedures. Information and Assistance Caregiver:

- provides the individuals with current information on opportunities and services available to the individuals within their communities, including information relating to assistive technology;
- assesses the problems and capacities of the individuals; and
- serves the entire community of older individuals particularly—
- caregivers who are older individuals with greatest social need;
- older individuals with greatest economic need;
- older relative caregivers of children with severe disabilities, or individuals with disabilities who have severe disabilities;
- family caregivers who provide care for individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction; and

- caregivers of “frail” individuals defined as: unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; and/or cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

Overview

Background

Funding under the [National Family Caregiver Support Program \(NFCSP\)](#) supports family and informal caregivers as they support their care receiver in the community, for as long as possible. Eligible caregivers receive support through counseling, support groups, education, information, and respite services.

Policies incorporated into this RFP are dictated by the federal OAA through the Administration for Community Living (ACL), the Office of Management and Budget (OMB), the MBA, and Trellis.

Funding Guidelines

Successful applicants will enter into an award agreement with Trellis for the provision of OAA Title III-E National Family Caregiver Support Program Services proposed in the application. Awarded funding amounts will be allocated annually based on performance, ability to serve targeted populations, and availability of funds.

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 Title III service proposed in the OAA Title III-E Funding Application.

Priority	Description	Score
Feasibility	Proposal clearly articulates how funding will be used to deliver services. Applicant demonstrates ability to manage federal funds.	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 for Black, Indigenous, and Other Persons of Color (BIPOC).	15%
Leadership	Proposal describes how program staff and organizational leadership reflect communities served.	5%

Application Timeline

The following timeline includes key dates for the Trellis OAA Title III-E RFP application process:

<p>May 8 Publish Request for Proposals</p>
<p>May 17 and May 23 Applicant Conferences 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: 2:00 to 3:00 PM Join the May 17 Applicant Webinar Meeting ID: 854 7844 3591 Passcode: 360926 Call-In Option: (651) 372-8299</p> <p>May 23 Applicant Conference: 8:30 to 10:00 AM Join the May 23 Applicant Webinar Meeting ID: 854 7844 3591 Passcode: 360926 Call-In Option: (651) 372-8299</p>
<p>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 style="text-align: center;"> May 22 May 30 June 5 </p>

June 12 June 14
<p>June 8</p> <p>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> <p>Last day to submit questions</p>
<p>June 23</p> <p>Proposals due</p>
<p>October 30 (approximate)</p> <p>Applicants informed of funding decisions</p>
<p>October 31 – December 20</p> <p>2024 Award negotiations</p>
<p>January 1, 2024</p> <p>Funding and services begin</p>

Information for Applicants

General Provisions

Services outlined in the OAA Title III-E Funding Application must reflect the needs of caregivers 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

Applicants must agree to follow the guidelines regarding participant registration forms known as NAPIS (National Aging Program Information System). These forms are to be used in the

PeerPlace database. Trellis will not reimburse awarded applicants for services provided to participants ineligible for a Title III-E service, which includes individuals who do not complete a NAPIS form for registered Title III-E services.

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 service.

When providing services priority must be given to:

- At risk caregivers identified with high levels of stress who: are caring for someone with intense physical care needs, behavioral issues and/or health and safety issues; report their own health as fair to poor, have a financial hardship, and/or with intent to place the care receiver in a long-term care facility.
- Caregivers who are older individuals (60+), with the greatest social and economic need, with particular attention given to low-income caregivers (200% of [federal poverty guidelines](#)), minority caregivers, and those with limited English proficiency.
- Caregivers who provide care for care recipients who are older individuals, with the greatest social and economic need, who are not yet eligible for the Elderly Waiver and Alternative Care programs, with particular attention to low-income minorities.
- Caregivers who provide care for older individuals (60+) with Alzheimer's Disease and related disorders with neurological or organic brain dysfunction.
- Relative caregivers (excluding parents) who are 55 years or older and providing care for:
 - Children with severe disabilities (minor children age 0 to 18 years of age); or
 - Individuals 18-59 years of age, with severe disabilities.
- Caregivers or care receivers who identify as Lesbian, Gay, Bisexual, or Transgender.

Eligibility Criteria

Adult family members or other individuals 18 years of age and older, who are informal providers of in-home and community care to:

1. An individual 60+ years of age or

2. An individual (of any age) with Alzheimer’s disease or a related disorder with neurological and organic brain dysfunction.

Caregivers defined above receiving respite care and supplemental services must be caring for a person who is determined “frail” in accordance with the conditions specified in the Older Americans Act:

- a. Unable to perform at least two activities of daily living without substantial human assistance, including verbal cueing, or supervision; or
- b. Due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

Older Relative caregivers

1. Caregivers who are a grandparent or an older individual who is a relative caregiver of a child, not more than 18 years of age or who is an individual (19 – 59 years of age) with a disability. A caregiver includes a grandparent, step-grandparent, or a relative of a child by blood, marriage or adoption, who is 55 years or older and who:
 - a. Lives with the child;
 - b. Is the primary caregiver of the child because the biological or adoptive parents are unable or unwilling to serve as the primary caregiver of the child; and
 - c. Has a legal relationship to the child, such as legal custody or guardianship, or is raising the child informally.
2. Caregivers who are 55 years or older and a parent, grandparent, or other older relative by blood, marriage, or adoption of an individual with a disability [as defined in Section 3 of the Americans with Disabilities Act of 1990 (42 USC 12103)] ages 19-59 and is an informal provider of in-home and community care. The caregiver:
 3. Lives with the individual.

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 not to 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 to provide Counseling, Respite, and Information and Assistance. The review committee awards ABC Organization for Respite only.

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 agreement that includes a description of the services, state and federal funding regulations, 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 monthly basis using PeerPlace and other reporting mechanisms as required by the MBA and Trellis.

Awarded applicants will be required to cover the cost of PeerPlace. PeerPlace costs are an allowable expense under Title III and can be included in the budget. The costs are as follows:

- \$750 per licensed user (annual cost per license)
- \$1,500 for a new organization (plus one program, e.g., Chore); \$800 for each added program (one time cost)
- \$1,000 to add a new service for an existing organization in PeerPlace; \$800 for each added program (one time cost)

For Awarded Applicants

Awarded applicants must agree to obtain the information and documents below as part of the final Title III 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-E National Family Caregiver Support Program Funding Application

[OAA Title III-E National Family Caregiver Support Program Funding Proposal](#)

[OAA Title III-E National Family Caregiver Support Program Proposal 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