



Trellis 2023 RFP Applicant Conference

May 17 and 23, 2023



Our mission is to assist individuals age well and develop the capacity of communities to care for an aging population.

We provide services, information and innovations to help people **optimize well-being** as they age.




WHAT WE DO

Connect people with services and resources

Fund community organizations that provide services to older adults

Bring networks together for collaborative action

Lead the charge to connect health care and social care



Trellis is the
Area Agency on Aging
for the seven-county metro area.

We administer federal Older Americans Act funding for services that help older adults and caregiver live safely and independently in their communities.

Taking Action on Our Commitment to Equity



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.

Acting 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.

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're taking steps in the process 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 to provide for 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 want to hear from you!

- **Applicant conferences** – May 17 and May 23.
- **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 webinars, technical assistance ‘open house’, or one-on-one consultations will be posted online. Trellis will not identify the source of the question in our posting.





About the funding

- Federal Funds
- Minimum Award Amounts
- Eligibility for Title III Services
 - Title III-B: Age 60+
 - Title III-C: Age 60+
 - Title III-D: Age 60+
 - Title III-E:
 - Age 18+ caring for a person 60 years of age or older
 - Age 18+ caring for a person of any age with dementia
 - Age 55+ caring for a child under the age of 18, or an adult with a disability age 19-59
- 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.

RFP Open for all Title III Services

Title III-B Supportive Services

Title III-C Senior Nutrition Services

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

Title III-E National Family Caregiver Support Program

**Awards Begin on January 1,
2024**



What We Will Fund this Cycle



Title III-B Supportive Services

These crucial services provide a variety of services to address functional limitations, maintain health and independence, and promote access to services that are not easily accessible due to language and/or cultural barriers.

Trellis will fund the following services under Title III-B in this award cycle:

1. Assisted Transportation (door through door)
2. Chore
3. Homemaker (includes grocery delivery)
4. Home Modification
5. Legal Services
6. Special Access (Individual and Group)

Title III-B award minimum is set at \$50,000 (see RFP for Home Modification exception).

What We Will Fund this Cycle



Title III-C Senior Nutrition Services The purpose of Title III-C funds are to:

- (1) reduce hunger and food insecurity;
- (2) promote socialization of older adults; and
- (3) promote the health and well-being of older individuals.

Title III-C award minimum is set at \$275,000.

The Title III-C services Trellis will fund for 2024 – 2026 include:

Congregate Meals (Title III-C1)

- A meal provided by a qualified nutrition provider to an eligible individual in a Congregate or group setting.

Home-Delivered Meals (Title III-C2)

- A meal provided to an eligible individual in his/her place of residence.
- This includes meals that leave a congregate setting to be enjoyed at home.



What We Will Fund this Cycle

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

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. The classes Trellis will fund are:

A Matter of Balance	Powerful Tools for Caregivers
Stay Active and Independent for Life (SAIL)	Program to Encourage Active, Rewarding Lives (PEARLS)
Living Well with Diabetes	Stepping On
Living Well with Chronic Conditions	Bingocize
Living Well with Chronic Pain	Walk with Ease
Tai Ji Quan: Moving for Better Balance	Aging Mastery Program
FallsTalk	Diabetes Prevention Program (DPP)

Title III-D award minimum is set at \$5,000.

What We Will Fund this Cycle



National Family Caregiver Support Program (Title III-E)

These services are designed to support caregivers of older adults and older relatives raising children.

The III-E services Trellis will fund for 2024 – 2026 include:

- Caregiver Counseling
- Caregiver Support Groups
- Caregiver Training
- Respite
 - In-Home
 - Out-of-Home Day
 - Out-of-Home Overnight
 - Other (e.g. Virtual)
- Public Information Services
- Information and Assistance

Title III-E award minimum is set at \$50,000



OAA Title III Service Area

- Funds provided through this RFP are intended to serve the target population 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.



Target Population

- Proposed services must be targeted to people age 60 and older in greatest need of services, with particular attention to:
 1. Low-income older adults and caregivers
 2. Minority older individuals and the people that care for them
 3. Older adults and caregivers with limited English proficiency
 4. Older adults at risk for institutional placement
- Services must be person-centered, sensitive to cultural differences and responsive to the changing needs of communities.
- III-B Legal Services and III-C Senior Nutrition Services have additional targeting priorities listed in the RFP.



Applicant Eligibility

- Nonprofit and for-profit organizations and units of government who have experience in providing the services outlined in this RFP are eligible to apply.
- Applicants are encouraged to apply for any and all services available through this funding competition.
- One application and budget are required for each proposed Title III funding category.
- There is no maximum number of services for which applicants must apply.
- Applicants may, and are encouraged to, partner with other service providers to meet the needs of a broader target population.



Funding Period

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



Available Funding

Title III-B Supportive Services

- A total of **\$2,345,757** is available for Title III-B Supportive Services in 2024
 - **\$1,519,702** available for 2025 and 2026
- The Trellis Board of Directors has approved the following distribution of available Title III-B funds for services in this three-year award cycle:
 - Assisted Transportation - 27%
 - Chore - 16%
 - Homemaker - 15%
 - Home Modification - 2%
 - Legal Services - 12%
 - Special Access - 28%



Available Funding

Title III-C

2024

- A total of \$1,766,068 is available for Title III-C1 Congregate Dining
- A total of \$6,141,416 is available for Title III-C2 Home Delivered Meals

2025

- A total of \$1,766,068 is available for Title III-C1 Congregate Dining
- A total of \$4,797,277 is available for Title III-C2 Home Delivered Meals

2026

- A total of \$1,766,068 is available for Title III-C1 Congregate Dining
- A total of \$4,797,277 is available for Title III-C2 Home Delivered Meals

Available Funding



Title III-D

2024:

- **\$245,350** is available for Title III-D Evidence-Based Health Promotion and Disease Prevention programs.
 - **\$156,618** is available for calendar years 2025 and 2026

Title III-E National Family Caregiver Support Program

2024:

- **\$1,284,395** is available for Title III-E National Family Caregiver Support Program services.
 - **\$1,028,079** is available for calendar years 2025 and 2026



Notes on Available Funding

- The minimum amounts that may be requested for each funding source is:
 - III-B \$50,000
 - III-C \$275,000
 - III-E \$50,000
 - III-D \$5,000



Match Requirement

- Awarded applicants that receive federal **Title III-B** and **Title III-C** funding must contribute **15%** of non-federal resources as match. Allowable match sources include cash and the value of in-kind contributions such as volunteer time. (CFR 200.306)
- Awarded applicants that receive federal **Title III-E** funding must contribute **25%** of non-federal resources as match. Allowable match sources include cash and the value of in-kind contributions such as volunteer time. (CFR 200.306)
- **Title III-D** does not have a match requirement.



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.
- Another method is for older adults to voluntarily contribute to a service (e.g. donation box).
- Cost Sharing is **not** required for III-C services, though providers are still required to inform older adults of the option to contribute to the cost of the meal.



Cost Sharing and Client Contributions

- 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 agree 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. 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)

Data Collection Requirements

Registered Services require that an older adult 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.

Older adults 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, 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.

Registered Services require a completed NAPIS form

Unregistered Services do not require a completed NAPIS form but demographic information still needs to be gathered



Supportive Services Program Registration			
Please complete this form to the best of your ability. Heavily outlined items are for office use only.			
Contact Date	AAA Region	Office Staff Select	
Section A. Basic Demographics			
Last Name	First Name	Middle Initial	
<input type="checkbox"/>	Gender: <input type="radio"/> Female <input type="radio"/> Male	Date of Birth:	
	<input type="radio"/> Unspecified		
Address:		Address #2:	
City:	State: MN	Zip Code:	County:
Home Phone:	Mobile Phone:	Work Phone:	
Section B. Social History			
Race (Check all that apply): <input type="radio"/> American Indian or Alaska Native <input type="radio"/> Asian or Asian American <input type="radio"/> Native Hawaiian or Pacific Islander <input type="radio"/> Black or African American <input type="radio"/> White		Ethnicity (Check one): <input type="radio"/> Hispanic or Latino <input type="radio"/> Non-Hispanic	
Household Size (Check one): <input type="radio"/> I live alone. <input type="radio"/> I live with others.			
Section C. Financial			
<input type="radio"/> I live alone.....and my monthly income is between (Check one)			
<input type="radio"/> \$1,215/month or less <input type="radio"/> \$1,216 - \$1,823/month <input type="radio"/> \$1,824-\$2,430/month <input type="radio"/> More than \$2,430/month			
<input type="radio"/> I live with my spouse.....and our monthly income is between (Check one)			
<input type="radio"/> \$1,643/month or less <input type="radio"/> \$1,644-\$2,465/month <input type="radio"/> \$2,466-\$3,287/month <input type="radio"/> More than \$3,287/month			
Section D. Contacts			
Emergency Phone:	Emergency Contact Name	Emergency Contact Relationship:	
Section E. Activities of Daily Living			
Can you walk around inside without any help? <input type="radio"/> Yes <input type="radio"/> No	Can you bathe or shower without any help? <input type="radio"/> Yes <input type="radio"/> No		
Can you sit up or move around in bed without any help? <input type="radio"/> Yes <input type="radio"/> No	Can you use the toilet without any help? <input type="radio"/> Yes <input type="radio"/> No		
Can you comb your hair, shave, wash your face, or brush your teeth without any help? <input type="radio"/> Yes <input type="radio"/> No	Can you dress without any help? <input type="radio"/> Yes <input type="radio"/> No		
Can you get in and out of bed or chair without any help? <input type="radio"/> Yes <input type="radio"/> No	Can you manage eating without any help? <input type="radio"/> Yes <input type="radio"/> No		

Section F. Independent Activities of Daily Living	
Can you answer the telephone or make a phone call without help? <input type="radio"/> Yes <input type="radio"/> No	Can you do heavy house cleaning, like yard work and laundry, without any help? <input type="radio"/> Yes <input type="radio"/> No
Can you shop for food and other things you need without help? <input type="radio"/> Yes <input type="radio"/> No	Can you take your medications without help? <input type="radio"/> Yes <input type="radio"/> No
Can you prepare meals for yourself without help? <input type="radio"/> Yes <input type="radio"/> No	Can you handle your own money, like keeping track of bills without help? <input type="radio"/> Yes <input type="radio"/> No
Can you do light housekeeping, like dusting or sweeping, without help? <input type="radio"/> Yes <input type="radio"/> No	Can you use public transportation or drive beyond walking distances without help? <input type="radio"/> Yes <input type="radio"/> No
Section G. Use of Information	
<p>I understand that the information I am providing on this form is for registration purposes. The information will be used by the U.S. Health and Human Services Administration for Community Living (ACL), the Minnesota Board on Aging (MBA) and the local Area Agency on Aging to create statistical reports. ACL, MBA or its assignees may use this information to conduct a study and/or survey of this service. In addition, information provided here, may be used by other service providers to help identify other services from which I may benefit. This information will not be released to anyone other than the above mentioned parties in a way that will identify me as an individual unless I sign a separate consent for that purpose.</p> <p>My signature (written or typed) indicates my agreement for this information to be used as indicated above.</p>	
Signature: _____	Today's Date: _____

MBA 02/2023

Our Funding Priorities



This table 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 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 informed 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 older adults in defining the needs or how they plan to engage older adults in defining the needs with an understanding of older adults in your community.	30%

Our Funding Priorities



This table 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 Funding Application.

Priority	Description	Score
Equity	Proposal clearly expresses how services or activities address inequities and disparities in BIPOC communities.	15%
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%
Leadership	Proposal describes how program staff and organizational leadership reflect the communities served.	5%

Application Timeline



May 8

Publish Request for Proposals

May 17 and May 23

Applicant Conferences

June 8

Submit Applicant Interest Form (optional)

June 16

Last day to submit questions

June 23

Proposals due

October 30

Applicants informed of funding decisions

Get Assistance

We are available to assist you in applying for these funds. If you have a question or need help, we want to hear from you!

- **Applicant conferences** – May 17 and 23
- **Virtual technical assistance open houses** – May 22 and 30; June 5, 12, and 14
- **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 webinars, technical assistance ‘open house’, or one-on-one consultations will be posted online. Trellis will not identify the source of the question in our posting.



Interest Form

June 8

Submit Applicant Interest Form (optional)

Trellis would like to hear from organizations that are interested in applying for Title III funding in this competition. 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.

Application Checklist and Submission Instructions



- Application (includes organization information and narrative)
- Budget (simplified) and persons served
- Organization chart
- IRS Tax Exempt Letter if a non-profit
- 501(c)(3) incorporation if a non-profit
- Insurance certification (allowable if not at required limits)
- Indirect cost rate (if a federally approved rate)
- Latest financial audit or financial statements

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

Application Checklist and Submission Instructions, cont.



In addition to the previous documents, **III-C applicants** must also submit the following additional documents:

- Copy of contract or award template used for subrecipients or subcontractors
- Copy of most recent menus or proposed menus
- Copy of Disaster Plan or Continuity of Operations Plan (COOP)
- Food procurement policy
- Policies to follow required nutritional guidelines

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



Next Steps for Awarded Applicants

- 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 for III-B, III-D, and III-E may request an advance of up to 15% of the Title III award amount at the beginning of the calendar year. Advances are not available for Title III-C.



Website Orientation and Budget Example



Thank you!

Contact us at:

title3@trellisconnects.org



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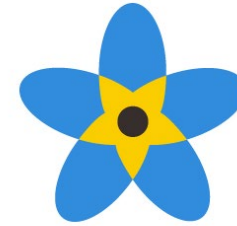


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**Dementia
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