



OLDER AMERICANS ACT
TITLE III

2023 Title III Request for Proposals

For Title III-B Supportive Services to Begin in 2024

Applications due
June 23, 2023



TRELLIS[™]

Area Agency on Aging

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FOR ORGANIZATIONS

2023 Title III-B Older American Act Funding for Supportive 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 further develops statewide policies for OAA funded programs.

Trellis is inviting proposals for OAA III-B Supportive Services for service delivery to begin on January 1, 2024:

1. Supportive Services (Title III-B)

These crucial services include rides to appointments, home modifications, help with chores in or outside of the home or apartment, and delivery of grocery items to make it easier for older adults to age at home in their community. These services also include providing legal education and services, and activities that link older adults to community and government services that are not easily accessible due to language and/or cultural barriers.

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

Trellis seeks proposals for supportive services that support consumer choice and increase social and community connections for the Older Americans Act (OAA) target population. OAA Title III-B Supportive Services are available to older adults age 60 or over. Services are available to all older adults and caregivers regardless of their income or ability to contribute to the service. Proposal budget minimums for OAA Title III-B funding is set at \$50,000.

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

Service Area

Trellis will award OAA Title III-B Supportive Services 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 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 **\$2,345,757** is available for Title III-B Supportive Services in 2024. Because the American Rescue Plan Act (ARPA) funds end on September 30, 2024, Trellis is projected to have \$826,055 less in OAA Title III-B Supportive Service funding and will result in lower funding Title III-B funding levels beginning in 2025.

2024 - \$2,345,757

2025 - \$1,519,702

2026 - \$1,519,702

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

1. Assisted Transportation (27%)
2. Chore (16%)
3. Homemaker (15%)
4. Home Modification (2%)
5. Legal Services (12%)
6. Special Access (28%)

Match Requirements

Awarded applicants that receive federal Title III-B funding for Supportive Services must contribute 15% 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 Title III-B Supportive Service budget for the definition of Non-Federal Match. The Title III Federal share earned under a Title III award may not exceed 85% 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. 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-B 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-B Supportive Services (OAA Title III-B 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 Special Access, Homemaker, Nutrition Services, and Caregiver Support Groups. The review committee awards ABC Organization funding for Special Access and Homemaker, but not for the other services.

Some Title III-B Supportive Services are considered registered services that require an older adult 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.

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 (e.g. Legal 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.

Description of Title III-B Support Services

1. **Assisted Transportation:** Services or activities that provide or arrange for the travel, including travel costs, of individuals from one location to another. This service includes escort or other appropriate assistance for a person who has difficulties (physical or cognitive) using regular vehicle transportation. Provides a gentle arm for assistance from the first door of the rider's residence to any type of vehicle and from the vehicle to the first door of the destination. Assistance with mobility devices and other types of assistance to ensure the older individual is supported within this service delivery. 1 unit = 1 one-way ride
2. **Chore:** Performance of heavy household tasks (including but not limited to washing floors, windows and walls; basic home maintenance; or moving or removal of large household furnishings and heavy appliances) provided in a person's home and possibly other community settings. Tasks may include yard work or sidewalk maintenance in addition to heavy housework. 1 unit = 1 Hour
3. **Homemaker:** Performance of light housekeeping tasks provided in a person's home and possibly other community settings. Task may include assistance such as preparing meals, shopping for food and other personal items, managing money, answering or making telephone calls /other electronic communication or doing light housework (including but not limited to laundry). 1 unit = 1 Hour
4. **Home Modification:** Physical adaptations to the home and vehicle that are necessary to ensure the health and safety of an individual or that enables the individual to function with greater independence in their home. Not more than \$ 500.00 per client may be expended under this part for such modification (per CFR 1321.3). 1 unit = 1 Project
5. **Legal Assistance:** Legal advice and representation provided by a licensed attorney in good standing to older individuals with economic or social needs; and includes to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of a licensed attorney in good standing; and counseling or representation by a non-lawyer where permitted by law. Legal advice and representation may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services (including preparing legal documents), and pro se assistance. Community legal education efforts to educate, train, and

empower older adults to know their legal rights when provided by an individual authorized to provide legal assistance. 1 unit = 1 Hour

6. **Legal Education:** Education and information provided to older adults by an individual authorized to provide legal assistance, which informs individuals about legal rights or benefits and how to access legal services statewide. 1 unit = 1 Project
7. **Special Access (Individual and Group):** Activities that link elders to community and government services that are not easily accessible due to language and/or cultural barriers. Individual Services include information and referral, advocacy, outreach, phone contact, escort, translation, home visits, form completion, service coordination, and limited case management. Group activities may include education, social, cultural, support groups, or others (e.g. wellness or health fairs). 1 unit = 1 Hour

Additional Information for Legal Services Applicants

Definitions

Legal assistance and education is measured on an hourly basis (1 hour = 1 unit of service) and means:

- a) Legal advice and representation provided by a licensed attorney in good standing to older adults with economic or social needs; and
- b) Includes-
 - i. To the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of a licensed attorney in good standing; and
 - ii. Counseling or representation by a non-lawyer, where permitted by law
 - iii. Community legal education efforts to educate, train, and empower elders to know their legal rights when provided by an individual authorized to provide legal assistance.

Legal advice and representation may be provided face-to-face, by telephone or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services (including preparing legal documents) and pro se assistance.

Direct supervision is oversight of the services provided by a professional who is licensed to provide such services in order to ensure appropriate quality and scope of those services. Direct supervision includes but is not limited to a personal review of work product and real time availability to respond to questions from the persons being supervised.

Participant Eligibility and Target Population for Legal Services

Eligible individuals must be 60 years of age or older with services targeted to individuals with incomes at or below 200% of the federal poverty limits and who meet one of the following criteria:

1. Is a member of a diverse population
2. Has limited English proficiency

Older Adults who are most vulnerable should be considered for priority legal assistance, including:

- Homeless or housing-insecure older adults
- Older adults who are part of a historically marginalized group such as black, indigenous, persons of color, and LGBT communities
- Physically and/or socially isolated older adults, such as those living in rural areas, those living with mobility limitations, diminished vision or hearing and those who are living with disabilities
- Older adults born outside the United States, regardless of immigration status, with a special focus on those who are crime victims, those looking to access or maintain eligibility for benefits and those looking to amend or remove guardianship conditions
- Older adults who are victims of elder abuse, neglect, or exploitation (including fraudulent and deceptive financial and consumer practices)

- Older adults with chronic health problems or problems with access to health care,
- Older veterans
- Locally identified target populations

General OAA Title III-B Legal Information

Annually or every other year, awarded applicants shall meet with Trellis staff in joint planning and development sessions regarding the provision of legal needs within the planning and service area and service areas of the awarded applicant.

Under the direction of the State Legal Assistance Developer and Trellis, awarded applicants will participate in a statewide survey and assessment of community legal needs to be conducted on a regular basis, approximately every 3-4 years, to update and inform State and Area plan priorities.

On an annual basis, awarded applicants will meet with a representative of the Office of the Ombudsman for Long-Term care to discuss ongoing coordination, communication and appropriate targeting of services to the populations served.

On an annual basis, awarded applicants will meet with a regional Senior Linkage Line representative from Trellis to enhance understanding, ensure appropriate referral protocols and establish stronger working relationships.

Awarded applicants will have office hours and targeted outreach efforts (including, but not limited to off-site clinics or legal kiosks) and will be available to make home visits as necessary to make legal assistance reasonably accessible to vulnerable and isolated older persons.

Awarded applicants will have in place written procedures for case intake, acceptance and rejection. Awarded applicants will also have a written grievance process for disposition complaints made by or on behalf of older adults.

Awarded applicants shall include a minimum of \$1,000 per year for the purpose of skills development.

Awarded applicants will use the Older Americans Act Performance System (OAAPS) guidelines to collect and report client and case data to Trellis and MBA on a quarterly basis. The MBA will provide reporting instructions and specific definitions to ensure compliance with the OAAPS system. The OAAPS system follows a federal fiscal year, beginning each October 1 and ending September 30.

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 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 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: 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 Click Here May 22 May 30 June 5 June 12 June 14</p>
<p>June 8 Deadline to submit Applicant Interest Form (optional) 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 Last day to submit questions</p>
<p>June 23 Proposals due</p>
<p>October 30 Applicants informed of funding decisions</p>
<p>October 31 – December 20 2024 Award negotiations</p>
<p>January 1, 2024 Funding and services begin</p>

Information for Applicants

General Provisions

Services outlined in the OAA Title III-B 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.

Applicant proposal budget minimum is set at \$50,000.

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-B service, which includes individuals who do not complete a NAPIS form for registered Title III-B 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 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 Special Access, Homemaker, Nutrition Services, and Caregiver Support Groups. The review committee awards ABC Organization funding for Special Access and Homemaker, but not for the other services.

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 within the award, 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 quarterly 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-B Supportive Services Funding Application

[OAA Title III-B Supportive Services Funding Proposal](#)

[OAA Title III-B Supportive Services 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

Title III-B Supportive Services Funding Application

[OAA Title III-B Supportive Services Funding Proposal](#)

[OAA Title III-B Supportive Services 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 (simplified) 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