



Your Life,
Your Way,
At Home

Somerville-Cambridge Elder Services

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SOMERVILLE-CAMBRIDGE ELDER SERVICES, INC.—AREA AGENCY ON AGING Request for Proposals Older Americans Act Title III-B and Title III-D

Available: Friday, April 21, 2023
Due: By midnight on Friday, May 26, 2023

Contact: Colleen Morrissey
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ABOUT SCES AND OLDER AMERICANS ACT FUNDING

Through our role as a federally designated Area Agency on Aging, Somerville-Cambridge Elder Services (SCES) administers Older Americans Act (OAA) funds, also known as Title III funding, every other year.

This funding allows SCES to provide small grants to nonprofits that serve **Somerville and/or Cambridge residents ages 60 and over with the greatest economic need** (at or below the poverty line), as well as **those ages 60 and over with the greatest social need**, as defined by the OAA (which includes social isolation due to physical and mental disabilities; language barriers; and cultural, social, or geographic isolation).

The Title III allocations that we make under the OAA include:

- Title III-B awards for legal services, in-home services, and services that facilitate access to existing services, and
- Title III-D awards for evidence-based programs for medically underserved older adults and older adults with the greatest economic need for services.

Please note that eligible programs for Title III-D funding are [defined by the Administration for Community Living](#); contact Colleen Morrissey at 617-628-2601 or colleen.morrissey@eldercare.org for more information.

Who We Are

For the past 50 years, Somerville-Cambridge Elder Services (SCES) has helped older adults (ages 60 and over) and adults with disabilities of all ages maintain independence and well-being in the setting of their choice. Our mission is focused on helping people age in place regardless of income level.

SCES is a state and federally designated access point for elder services. We provide many services at no cost or on a sliding fee scale. Our primary services are case management and service coordination, information and referral, protective services, and Meals on Wheels. SCES also offers many support programs, including money management assistance, Medicare counseling, mental health support, and caregiver support.

SCES values, and our clients benefit from having, perspectives from different backgrounds and experiences, including, but not limited to, age, disability, race and ethnicity, family, or marital status; sexual orientation, gender, gender identity, and expression; language, national origin, physical and mental ability, religion, socio-economic status, or veteran status.

HOW TO APPLY

[Proposals should be submitted online, using the application portal.](#) If you are unable to access this portal or submit online for any reason, please contact Colleen Morrissey by phone or email. (See contact information on page 1.)

Guidelines

1. Typical single year funding awards range from \$4,000 to \$8,000. The Allocation Committee prefers funding requests within this range, but will consider all proposals.
2. Applicant agencies must be registered to do business within the state of Massachusetts.
3. Applicant agencies must perform Criminal Offender Record Information (CORI) checks on employees and volunteers who have contact with clients or client information.
4. Proposals must be complete to be considered for funding.
5. Applicants may submit two separate proposals, if applying for one Title III-B and on Title III-D program.

Instructions to complete the answers to questions, project workplan, projected clients and services chart, project budget and project budget narrative follow.

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PRIORITIES FOR FUNDING

General Older Americans Act Priorities

Services provided with Older Americans Act funds must give priority to elders with:

- The greatest economic need - “need resulting from an income level at or below the poverty line”
- The greatest social need - “need caused by non-economic factors”, which include:
 - physical and mental disabilities
 - language barriers
 - cultural, social, or geographic isolation, including isolation caused by racial or ethnic status that restricts the ability of an individual to perform normal daily tasks, or threatens the capacity of the individual to live independently

The OAA requires that local **Title III-B** allocations include awards for legal services, in-home services, and services that facilitate access to other existing services (such as benefits counselors who help older adults access health insurance, SNAP benefits, etc.).

Services provided under **Title III-D** of the OAA must give priority to medically underserved elders and elders with the greatest economic need for the services. These funds can only be used for [evidence-based programs as defined by the Administration for Community Living](#).

Local Service Priorities

Additional Title III-B priorities include the following local service priorities as identified in the [Area Plan on Aging](#):

1. transportation—expanded and improved options;
2. in-home or community-based services that:
 - address isolation and loneliness;
 - support access to services and supports for ethnic and linguistic minorities;
 - support the unique needs of LGBTQ older adults; or
 - support the ability of older adults to remain in their homes or prevent eviction.

Examples of Previously Funded Projects

Title III-B:

- Legal assistance to prevent evictions for low-income older adults living in Somerville or Cambridge
- Social and wellness activities, technology training and support, and case management for Chinese-speaking older adults living in Somerville and Cambridge
- Senior center and case management for Portuguese-speaking older adults in Cambridge and Somerville

Title III-D:

- Chronic Disease Self-Management Programs
- Diabetes Self-Management Programs

GRANT REVIEW & ALLOCATION PROCESS

An Allocation Committee, comprised of Area Agency on Aging (AAA) Advisory Council Members and staffed by the Area Planner, will review proposals and make funding recommendations to the SCES Board of Directors. In July, the board votes to accept, reject, or change the recommendations. The board’s decision of the board is final, although applicants do have an appeal process if they regard the decision as arbitrary or capricious. Organizations are notified by mail and/or email following the board’s vote.

The allocation of Title III-B and III-D funds is based on need, but the AAA gives consideration to ensuring balanced support for projects serving Somerville and those serving Cambridge. Please note that funds are extremely limited and contingent on continuation of federal funding.

Grant Awards

Upon notification of funding, SCES may require revisions of the grantee's proposed project budget and workplan, in accordance with the project's funding level. These revisions are required prior to the signing of a contract between

SCES and the grantee on or before October 1. SCES may attach conditions or provisions to contracts as needed to best serve the interests of elders in Somerville and Cambridge.

Title III-B and Title III-D awards will be made for FY 2024 (October 1, 2023 to September 30, 2024) and are renewable for FY 2025 contingent upon satisfactory program performance and reporting. Proposed project workplan, budget, and projected clients and services are required for FY 2025 projected activities prior to contracting for year two.

Reporting, Billing & Project Requirements

Grantees will be required to submit quarterly program reports and monthly fiscal reports to SCES. These reports are due within 15 calendar days after the end of the month or quarter for which the reports are made. Granted funds are disbursed on a cost reimbursement basis. The grantee incurs expenses and receives reimbursement only upon submission of the required reports. Reimbursements usually take two to three weeks.

SCES evaluates grantees on-site at least once per year. The evaluation is based on compliance with requirements of the contract, the stated workplan, and the budget. Grantees are required to develop and use a formal mechanism for gathering and incorporating client or participant opinion on the services supported with Title III-B/III-D funding. Grantees must also give clients or participants the opportunity to make voluntary, confidential contributions to the cost of Title III-B/III-D funded services. These contributions must be spent on the funded project during the fiscal year in which they are collected.

Any increase or decrease in federal monies available for allocation by SCES will be reflected in a contract amendment or, in the case of an increase, another RFP process may be conducted at the discretion of the agency.

APPLICATION PREVIEW & INSTRUCTIONS

Application Preview

** Required field*

Organization Name *
EIN *
Address *
Project Name *

Name *
Title *
Email *
Phone Number *

Title III Program *
III-B III-D

Project Description (limit to 75 words) *

Funds Requested *

All grantees for Title III funds must perform Criminal Offender Record Information (CORI) checks on employees and volunteers who have contact with clients or client information. Does your agency comply with this requirement? * (If you answer no to this question, your agency cannot be considered for funding.)

Name of Person Authorized to Submit Proposal *

Title *

Proposal Questions

Briefly describe your agency and its goals. What have been the agency’s objectives and accomplishments in serving elders, particularly in the past year? (limit to 500 words) *

If this is a request for continued funding, please give a progress report on the current fiscal year’s objectives. If objectives are not being achieved or have changed, please explain. (limit 250 words). *

Describe the proposed project. Be as specific as possible. Please describe specifically how the second year of your project will build on the objectives of the first. (limit to 500 words). *

Describe specifically how the proposed project addresses one or more of the Title III-B, III-D priorities as described under “General Older Americans Act Priorities” and “Local Service Priorities.” (limit to 250 words) *

What is the target population (include only Somerville-Cambridge elders)? How will you ensure the project reaches the targeted group? In what ways does the project particularly meet the needs of low-income minority elders? Describe your outreach plans to these groups. (limit to 250 words) *

Describe how this project is coordinated with existing community services. How is this project different from others that may be providing similar services? (limit to 250 words) *

What are your efforts to acquire other funds for this project, both in this Title III-B/III-D funding period and for future funding periods? Include specific information on other potential funding sources. (limit to 250 words) *

Projected Clients and Services

Projected Clients and Services estimates the number of elders the project will reach during the first federal fiscal year, year one of your project.

1. Unduplicated Number of Elders to Be Served. Please provide a count of the unduplicated number of older adults to be served by this program from October 1 through September 30. An unduplicated count means that each older adult, regardless of the number of times they come in contact with your program, is counted only once.
2. Number of Economically and/or Socially Needy Elders. Provide estimates of the numbers of older adults this program expects to serve in each of the listed categories. Definitions follow.
 - a. **Elders or Caregivers in Poverty** have incomes at or below the poverty threshold established by the Office of Management and Budget.
 - b. **Minority Elders or Caregivers** are African American, Haitian, Hispanic, Asian, or Native American.
 - c. **Disabled Elders or Caregivers** have a physical or mental handicap that substantially limits one or more major life activities such as caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, or working.
 - d. **Socially Needy Elders or Caregivers** have a need caused by non-economic factors: physical and mental disabilities; language barriers; cultural, social or geographic isolation. The need restricts the ability of an individual to perform normal daily tasks, or threatens the capacity of the individual to live independently.

An individual may be counted several times in this section. For example, a low-income Haitian elder who lives in a nursing home would be counted as low-income, minority, disabled and socially needy.

Total # Unduplicated Elders *

Total # Minority Elders *

Total # Elders in Poverty *

Total # Disabled Elders *

Total # Non-English Speaking Elders *

Total # Socially Needy Elders *

Projected Services and Units

Provide estimates of the kinds and quantity of services you will be providing to Somerville and/or Cambridge elders under the proposed project in the same period (between October 1 and September 30).

First, identify up to three primary services that you will be providing to older adults under your proposed project. For each of the primary services you will be providing, enter the number of clients and units of services projected for one federal fiscal year.

Remember, an individual elder might receive several units of service.

Projected Legal Assistance Clients Served
Legal Assistance Units of Service (1 Hour = 1 Unit)

Projected Transportation Clients Served
Transportation Units of Service (1 One Way Trip = 1 Unit)

Projected Outreach Clients Served
Outreach Units of Service (1 Contact = 1 Unit)

Projected Information & Assistance Clients Served
Information & Assistance Units of Service

Projected Health Promotion Clients Served
Health Promotion Units of Service (1 Session = 1 Unit)

Recreation Units of Service (1 Session = 1 Unit)
Projected Recreation Clients Served

Project Workplan

Outline a workplan for your proposed project for fiscal year 2024. A workplan consists of project goal(s) with a minimum of two specific objectives for each goal. Examples follow.

1. **State the goal or goals for your project.** A goal is a general statement that is long-range and conceptual, developed in response to an identified need. A goal does not have to be measurable, but should be defined so that progress towards it can be identified.

Examples:

- To assist disabled elders to stay safely in their homes.
- To provide legal services to elders with consumer disputes in order to reduce economic harm.

2. **Provide at least two objectives for each goal.** An objective is a specific statement that measures concrete progress towards a goal. Clearly define what and how much will be done for each objection as well as how and when it will be done.

Examples:

- Install 50 grab-bars for at least 40 unduplicated elders by September 30, 2024.
- Provide 35 hours of legal representation to 20 older individuals by September 30, 2024.

Agency Budget

Provide a copy of the annual total budget for your agency, including current funding sources. Please be specific about funding sources.

Project Budget Instructions

Outline the **TOTAL** budget for the project [using the template included in this document](#) and upload using the application portal. Budget figures must include all project costs and income from all sources. Please note that there is a **15% match requirement for Title III-B/III-D funds**. The match may be met with either other non-federal cash funds or with in-kind support. Indicate funds that meet the match requirement with an asterisk.

Cost Categories:

Please itemize the costs in each of the following categories:

- **Personnel** costs include both direct and indirect personnel necessary for the proposed project. Identify staff by position title. Include fringe benefits as a percentage of personnel costs.
- **Purchased Services** are obtained from a third party for the achievement of project objectives (e.g., adaptive equipment and materials).
- **Support Costs** are administrative costs associated with the project (e.g., postage and supplies).

Line Item Costs:

Column A: Project Cost details the expenses for each of the cost categories. All the other columns, B through E, should add up to the totals in column A.

Columns B through E indicate how the project will be funded.

- **Column B: Amount Allocated to Title III-B, III-D** is the amount you are requesting in this proposal.
- **Column C: Other Cash Sources** is income from all other cash sources (except generated income) contributing to the operations of the proposed project.
- **Column D: In-Kind Support** is the cash value of any non-cash support contributing to the operations of the proposed project. This support includes the value of donated space, donated supplies, and the support of volunteers.
- **Column E: Generated Income** is money raised through voluntary contributions or other types of fundraising as a result of project activity. These funds must be used within the project year to expand or supplement proposed project activity. The proposed project must show some projected income, an estimate of how much money will be raised through voluntary confidential contributions.

Project Budget Narrative Instructions

Provide a specific, line-by-line narrative explanation for each item listed in the proposed project budget using the [Project Budget Narrative form](#). Please be specific about sources of non-Title III-B/III-D income.

- **Personnel**—indicate titles, hourly rates or annualized salaries, number of hours and a breakdown of the fringe benefits offered.
- **Purchased Services**—indicate the anticipated service vendor.
- **Support Costs**—itemize each cost.

**TEMPLATE
TITLE III-B/III-D PROJECT BUDGET - FFY 2024**

AGENCY/PROJECT _____

COST CATEGORIES	LINE ITEM COSTS	LINE ITEM COST ALLOCATIONS (B+C+D+E = A)			
	A. PROJECT COST	B. TITLE III-B TITLE III-D	C. OTHER CASH	D. IN-KIND SUPPORT (NON-CASH)	E. GENERATED INCOME (CLIENT DONATIONS)
PERSONNEL					
TOTAL PERSONNEL					
PURCHASED SERVICES					
TOTAL PURCHASED SERVICES					
SUPPORT COSTS					
TOTAL SUPPORT COSTS					
TOTAL BUDGET					

- * Indicate with an asterisk all non-federal cash or in-kind funds which will satisfy the 15% match requirement.
- * Please be sure all columns add up properly, down and across, prior to proposal submission.

**TEMPLATE
PROJECT BUDGET NARRATIVE - FFY 2024**

ITEM	EXPLANATION	REVENUE SOURCE	AMOUNT
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PERSONNEL

FRINGE BENEFITS

PURCHASED SERVICES

SUPPORT COST