



Western Reserve

Area Agency on Aging

-
- **Older Americans Act Technical Assistance Meeting**
 - October 12, 2023



Western Reserve

Area Agency on Aging

Welcome & Introductions

Karen Webb, MSW, LSW

Director, Program Development and Planning

Funded Services

- Supportive Services (IIIB)
- Nutrition Services (IIIC1, IIIC2)
- Evidence-Based Health Promotion (IIID)
- Family Caregiver Support (IIIE)

Timeline

- **Submission Due Date** **October 20th 3pm**
- **Tentative Award announcement** **November 2023**
- **First Day of Service** **January 1, 2024**
- **Last Day of Service** **December 31, 2024**

Helpful Reminders

- Review: Ohio Department of Aging (ODA) Rules BEFORE completing application; reflect the current rules in your responses to questions.
- Rules are available from the ODA Website
 - <https://aging.ohio.gov/wps/portal/gov/aging/agencies-and-service-providers/rules-and-forms/currently-effective-rules>
- Review: “Sample Contract” carefully
- Thoroughly read through “all documents before completing the proposal.”
- Each question and all required documents are scored.

Application Overview

Application Materials available at:

- <https://www.areaagingsolutions.org>
 - 2024 Agency Overview
 - 2023 Sample Contract
 - Service Specific Questions
 - RFP Instructions & Forms
 - Contract Workbook
 - FW9
 - Dropbox Instructions

Application Overview

- Required forms are in Microsoft Word, Excel and PDF format
- All responses must be typed in a legible font style and size
- Handwritten responses are not acceptable
- Send questions to:
RFPQuestions@areaagingsolutions.org
until Noon on October 19th

Application Overview

BEFORE SUBMITTING YOUR PROPOSAL

- REVIEW
- Proposal Document Checklist
(Page 15 of 20: Instructions and Forms)
- Signatures And Dates
- Review Answers to ALL “Questions”

OAA APPLICANT PROPOSAL DOCUMENT CHECKLIST

All forms should be compiled in order and double-checked for completion and appropriate, original signatures. A copy of the entire application should be made. The original and copy of the application should be submitted in a single packet to WRAAA by the due date.

Please use this checklist to organize all application documents in your Application Proposal

Type Applicant Name: _____

☐ This application proposal includes all materials needed to apply for Older Americans Act Title IIIB, C and/or E funding, including appropriate original signatures, and one copy of the application.

Your Checklist	Application Order	Form Type and Document Name	Applicant Provides	Document	Forms in State Workbook
<input type="checkbox"/>	1	Application Proposal Document Checklist		Instructions & Forms	
<input type="checkbox"/>	2	Application Information Sheet			X
<input type="checkbox"/>	3	Applicant Authorization to Submit Certification		Instructions & Forms	
<input type="checkbox"/>	4	General Assurance		Instructions & Forms	
<input type="checkbox"/>	5	Proof of registration with the Ohio Secretary of State as a non-profit organization or as a for-profit business	X		
<input type="checkbox"/>	6	Evidence of at least one million dollars of commercial liability insurance coverage	X		
<input type="checkbox"/>	7	Evidence of insurance coverage for consumer loss due to theft or property damage	X		
<input type="checkbox"/>	8	A copy of the written procedure describing the step-by-step instructions a consumer may follow to file a claim	X		
<input type="checkbox"/>	9	Grievance Policy	X		
<input type="checkbox"/>	10	Form IRS W-9		Form W-9	
<input type="checkbox"/>	11	Department of Health and Human Services Assurance of Compliance with Section 504 of the Rehabilitation Act of 1973, as amended		Instructions & Forms	
<input type="checkbox"/>	12	Certification Regarding Debarment, Suspension and Other Responsibility Matters		Instructions & Forms	
<input type="checkbox"/>	13	Organizational Chart	X		
<input type="checkbox"/>	14	Applicant Overview Questions		Service Specific Questions	
<input type="checkbox"/>	15	Mission Statement	X		
<input type="checkbox"/>	16	Strategic Plan	X		
<input type="checkbox"/>	17	Current Annual Report	X		
<input type="checkbox"/>	18	Most Recent Audit Statement	X		
<input type="checkbox"/>	19	Conditions of Participation Questions		Service Specific Questions	
<input type="checkbox"/>	20	Service Application Questions (Complete the questionnaire for each service you propose to provide)		Service Specific Questions	
<input type="checkbox"/>	21	Contract Service Page and supporting worksheets (1 set per service)			X
<input type="checkbox"/>	22	Meal Worksheet(s) 1 per nutrition site proposed if proposing nutrition services			X

Application Overview

EXCEL WORKBOOK

- Read the instructions and fill out the workbook starting at the top of each page.
- Matching Funds : Requirements
(See: Application Overview p. 11 of 16)
- 40% match for catered Congregate, Home Delivered Meals
(Restaurant Voucher 15% match)
- 15% match for Title IIIB & Title IIID Services
- 25% match for Title IIIE Services (Family Caregiver Support Services)
- **Match can be any combination of “cash” and “in kind”**

Excel Workbook

- Excel documents required
 - One (1) Applicant Information Sheet
 - For each service = one set of documents
 - *One set = three (3) pages*
 - *Contract Service Page*
 - *Cost of Service Detail Page and*
 - *Sources of Revenue and Narrative Page*
 - And a set for each county, if multiple counties are served

Application Overview

- Evaluation Criteria
 - Need for service in proposed area
 - Applicant meets conditions of participation
 - Applicant has experience and capability to meet service specifications
 - Applicant demonstrates cost effectiveness
 - Applicant has experience serving older adults
 - Applicant has outreach capability

What happens next?

- Applications: Evaluated, Reviewed and Scored (Team of WRAAA Staff)
- Funded Applicants will receive contracting documents and their *award* amounts
- Final contracts are issued (only if all contracting materials are complete and correct for service to begin JANUARY 1, 2024)

APPLICATION DEADLINE REQUIREMENTS

- One (1) Competitive Proposal packet with original signatures, must be delivered to the Western Reserve Area Agency on Aging (WRAAA) at 1700 East 13th Street, Cleveland, Ohio, 44114 AND One (1) Competitive Proposal packet with signatures submitted **via Dropbox** using the link below by 3pm on Friday, October 20, 2023.
- <https://www.dropbox.com/request/yVBQpDfMXU3uUbt5hXsL>

Application Overview

READY TO SUBMIT PROPOSAL

Submit Complete proposal packet and Dropbox packet due OCTOBER 20th

- Must include:
 - **All documents:** See Application Document Checklist which includes...
 - **Service-Specific Questions** (p 1 of 63) (Agency Overview, Conditions of Participation and answer all the service specific questions)
 - **EXCEL Workbook Pages (OAA)** for each service.
 - If the application is “incomplete”; (i.e.: missing documents or no signatures) **The proposal will not be accepted**

Dropbox Instructions

- 1. Before going to Dropbox compile all the required proposal documents on your computer.
 - a. Place them all in a folder that includes your agency name.
 - b. Name each separate file with the Application Order # (including any leading zeroes) before the file name.
- 2. When all of the competitive proposal documents are complete:
 - a. Click on Dropbox Address. (Address will not work with Internet Explorer)
- **<https://www.dropbox.com/request/yVBQpDfMXU3uUbt5hXsL>**

Dropbox Instructions (2)

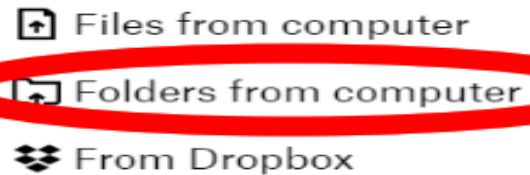
Donnie Gill sent you this request

OAA Community Based Services Proposal Link

Add files

or drag stuff here

- c. Click on Add Files
- d. Choose Folders from computer

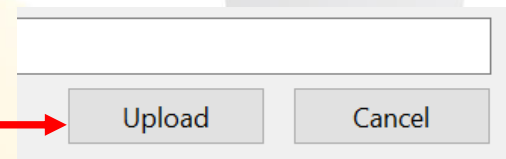


Files from computer
Folders from computer
From Dropbox

Dropbox Instructions (3)

- e. Browse your computer and find the location of the folder containing the Proposal Documents.

- f. Click on that folder and click Upload.



- g. Uploading may take a moment, please be patient.
- h. We will receive notification that your files have been uploaded via Dropbox.

***** As a reminder please deliver your complete competitive proposal with original signatures. *****



ADVOCACY. ASSISTANCE. ANSWERS ON AGING AND DISABILITIES.