



BOARD OF HEALTH – PROGRAM, POLICY, & APPEALS COMMITTEE
Agenda for August 15, 2022 at 1:00 PM

Meeting Location: Branch County Courthouse, Commissioner’s Meeting Room,
31 Division St., Coldwater, MI

1. Call to Order
 - a. Roll Call
2. Public Comment
3. New Business
 - a. AAA IIIC Grant Review – FY2022 Request for Proposal
4. Public Comment
5. Adjournment

Public Comment:

For the purpose of public participation during public hearings or during the public comment portion of a meeting, every speaker prior to the beginning of the meeting is requested but not required to provide the Board with his or her name, address and subject to be discussed. Each speaker will be allowed to speak for no more than three (3) minutes at each public comment opportunity. Board of Health By-laws, Article V, Section 3

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: 1CONG HDM
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Congregate & Home Delivered Meals **REVIEWED BY: LAS/NRS**
(Bidder combined applications)

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
Restaurant Voucher program – 4 participating restaurants
New meal site in Union City proposed/in process
RD subcontracted to support menu development
Many scratch made items on menus

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
Page 7, 20

4. Person-Centered Thinking activities/intent is identified? YES NO
Page 7, 21
Menu item alternates available – lactose free, ethnic foods, chopped/pureed, preferences

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
Commodity food programs, collaborate widely – Page 8
AARP, Michigan Works, faith community, AAA IIIC, Community Network, MDHHS/APS, head start/early head start, many others
- C. Other Funds to Support the Program(s)? YES NO
Suggested donation \$3.00/meal (HDM and Congregate)
CSBG – community services block grant to support both grants
\$49,000 HDM; \$15,000 CONG
- D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Bureau standards, Page 10-11, specific accommodations for LEP outlined
- E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe: feedback from participants #1
Page 11-12; Pages 25-26

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

- A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder HDM / CONG	Other Comparison FY22 budgets
Grant Funds Requested	\$144,813 / \$48,533	\$150,502 / \$40,240
Total Unit Rate	12.49 / 13.77	10.95 / 12.43
Grant Unit Rate	12.49 / 13.77	9.51 / 12.43
Number of Units	13,500 / 4,200	15,830 / 3,900
Program Income	5,000 / 3,000	3,300 / 3,900
Unduplicated Clients Served	80 / 200	72 / 200

Notes:
HDM delivery by volunteers at min of 3 days/week, more if needed

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____



Area
Agency on
Aging (IIIIC)
Branch-St. Joseph

570 N. Marshall Road, Coldwater, MI 49036

Phone: (517) 278-2538

www.bhsj.org/aaa

APPLICATION FORMS & ASSURANCES

FISCAL YEAR 2021-2022

**BRANCH-ST. JOSEPH AREA AGENCY ON AGING (IIIC)
Funding Application ~ Cover Page ~ Fiscal Year 2021-2022**

Agency: 1CONG HDM

Date: July --, 2022

Address: 175 Main Street
Battle Creek, MI 49014

Contact: Courtney lobe
Phone: 269-441-1616

Area Served: Branch County

Hours: 8 am-4pm

Federal Tax ID#: 38-1794361

Minority-Owned/Operated/Targeted Provider? Yes No

Are one-half of the organizations' board members minority individuals? Yes No

Legal Status: Private For Profit Private, non-profit Other _____

In-Home Services: Medicare Certified JCAHO Approved Medicaid Registered

Estimated Service By County: Branch 100 % St. Joseph _____%

PROGRAM PLAN

SERVICE(s):	Home Delivered Meals	Congregate Meals	
GRANT FUNDS REQUESTED	\$144,813	\$48,533	\$
TOTAL UNITS	17,446	5,282	
a. Grant	See budget form for details	See budget form for details	
b. Match (13% required)			
1. Cash			
2. In-Kind			
c. Program Income			
d. Other Resources			
Unit Rate	\$12.49	\$13.77	\$
Grant Unit Rate	\$12.49	\$13.77	\$
Client Cost	\$	\$	\$
Unduplicated Clients	105	242	
Minority	1	0	
Low Income	35	31	

PART I PROGRAM NARRATIVE

Congregate & Voucher Meal Program Narrative

OBJECTIVES/PROGRAM PLAN

This plan is predicated upon receiving both Home Delivered Meal and Congregate Meal program awards.

After reviewing the service specific minimum standards, describe in detail your agency's plan to implement the proposed project. Include information about unique and innovative aspects that will contribute to the overall success of the program.

Provide program outcomes for each service that your agency is applying for. Objectives must be measurable, verifiable, and time-limited. A format including specific outcomes, activities and time lines is preferred. Outcomes will be monitored at least annually by the AAA.

Provide an overview of your agency's intent to utilize a more person-centered approach to service provision. Also include the person-centered philosophy/values that your organization holds or may develop if they are not already in practice currently.

A. Program Eligibility

The Congregate program will serve participants meeting specific eligibility criteria (OSA Operating Standards, III C-3):

- Seniors age 60 years and over, or the spouse of a person age 60 years of age, or older.
- At the provider's discretion, individuals with disabilities who have not obtained 60 years of age but who reside in housing facilities occupied primarily by the elderly at which congregate services are provided.
- At the provider's discretion, non-senior individuals with disabilities who reside in a non-institutional household with and accompany an eligible older individual.
- At the provider's discretion, a non-senior volunteer who directly supports the meal site and/or food service operations may be provided a meal.

Capacity and Locations

1CONG HDM has the capacity to prepare, deliver, and serve congregate meals up to four days per week. 1CONG HDM will serve eligible seniors at Coldwater Church of Christ located at 360 Grand St. Coldwater, Michigan from the hours of 11:30 am – 12:30 pm. Coldwater Church of Christ is a barrier-

free facility, maintains compliance with local fire safety standards, and is licensed by the local Health Department (please see attachment 1). The church is focused on senior ministry and being a point for seniors to gather, socialize, and gain access to nutritious food. With approval, 1CONG HDM plans to open an additional congregate site in Union City at the new Union City Senior Center at 501 N. Broadway, Union City.

1CONG HDM also provides a Meal Voucher Program in which seniors may redeem vouchers for selections from an approved menu at participating restaurants.

Current restaurants:

<u>Resturant</u>	<u>Resturant Address</u>	<u>Days of Week</u>	<u>Times</u>
Broadway Grille - Union City	204 N Broadway, Union City, MI	Monday - Thursday	11:00 am to 10:00 pm
		Friday - Saturday	11:00 am to 11:00 pm
		Sunday	11:00 am to 9:00 pm
Broadway Grille - Coldwater	19 S Monroe St., Coldwater, MI	Monday - Thursday	11:00 am to 10:00 pm
		Friday - Saturday	11:00 am to 11:00 pm
		Sunday	11:00 am to 9:00 pm
Quincy Diner	174 E. Chicago St., Quincy, MI	Tuesday - Saturday	7:00 am to 3:00 pm
Mel's Diner	200 N Broadway, Union City, MI	Monday - Saturday	6:00 am to 2:00 pm

With the combination of the Congregate dining site and the Restaurant Voucher Program 1CONG HDM has been able to serve seniors throughout the entire Branch County area and provide them with more menu choices and locations for their nutritional needs. Data recently compiled by 1CONG HDM (please see attachment 2) indicates that by implementing the Restaurant Voucher Program 1CONG HDM has been able to expand service to all areas of Branch County and increase the number of individuals served.

Staffing

1CONG HDM is a Drug Free Work Place and Equal Opportunity Employer, which recruits, hires, and trains staff accordingly. Potential candidates receive background checks, drug screens, and reference checks as a requirement of hire and in accordance with AAA III-C policies. New Congregate staff receive agency orientation and specific training related to the Congregate program. Topics include, but are not limited to: introduction to the Congregate program, the aging network, the aging process, identification of abuse, neglect, exploitation, mandated reporting, food safety, universal precautions,

ethics, confidentiality, accident reporting, and emergency procedures. Staff receive all agency trainings and in addition to least twice per year department meetings, information and in-service trainings as needed. Policy and Procedure Manuals for the Congregate program are maintained and used for training.

1CONG HDM has a comprehensive Employee Handbook that clearly outlines additional employee policies and procedures. This can be available upon request.

Menu development and Nutrition Education

1CONG HDM contracts with a Registered Dietician to create the menu for congregate sites (please see attachment 3) in accordance with OSA Operating Standards and meets 1/3 of the Recommended Daily Allowance (RDA). Each monthly menu highlights a featured food (seasonally appropriate) and provides nutritional education relevant to that item (please see attachment 4). Education provided may include nutritional content, value, how to prepare the item, and recipes inclusive of the featured food. We also provide education when introducing new food items so that participants can make informed decisions regarding their nutrition.

The majority of meals are home-made and incorporate a variety of fresh or frozen fruits and vegetables, and whole grains. Once a year prior to the menu being sent for approval by the Registered Dietician, 1CONG HDM does a food survey to find clients food likes and dislikes. All meals are low in sodium and fat. Meals are a combination of comfort foods and ethnic foods. Examples of home-made comfort foods include: meatloaf, turkey stew, chili, and beans with ham. Examples of home-made ethnic foods include: sweet and sour chicken, tacos and baked ziti.

Meal Production

Congregate meals are prepared in the 1CONG HDM's owned kitchen at 85 Bennett Street, Battle Creek, Michigan. This kitchen meets all OSA requirements and is licensed by the local Health Department (please see attachment 5). Meals are cooked and served each day by trained and experienced kitchen staff and numerous volunteers. All kitchen staff are certified in food safety through the local Health Department. Volunteers also receive food safety training either by 1CONG HDM kitchen staff or through the local Health Department.

Meals are prepared according to standardized recipes, and are safely prepared, packaged, and delivered according to the current Michigan Food Code. A copy of the Michigan Food Code and established

Standard Operating Procedures are maintained in the kitchen and available for reference. Meals are served within four hours of preparation; temperature is monitored and recorded throughout the process in compliance with food safety regulations. Product is dated at time of receipt and preparation in order to ensure its use before expiration. Product is also used and rotated according to the First In, First Out (FIFO) inventory control method in order to ensure quality and safety, and to reduce waste.

Staff prepares meals according to appropriate serving size indicated in the OSA Operating Standards. Staff receives training on portion control and use standardized utensils to ensure correct portions.

The majority of food product purchased through a group-purchasing contract that has been determined to be the most cost effective purchasing model. The main vendor in this contract is Gordon Food Service (GFS). 1CONG HDM documents food cost and inventory monthly in order to ensure cost effectiveness and control waste.

Meal Service

Congregate staff and volunteers serve meals with standardized utensils appropriate for the correct serving size of each item. Congregate staff are licensed by the local Health Department in food safety. In addition, congregare staff receives training on proper food service and serving sizes at hire and at least once per year.

Each participant completes a simple intake form (please see attachment 6). Participants are then asked to sign in each day they receive a meal and to reserve for upcoming meals as soon as they can. Congregate site supervisors are responsible for assisting participants with this process and ensuring that documentation is accurate.

Voucher Program:

Vouchers are distributed each month to participants after they fill out an intake form on an annual basis. The monthly allocation is based on available funding. Currently 1CONG HDM is distributing 2-3 vouchers per person per month. Distributions sites include drive-thru serve at Church of Christ in Coldwater and Union City Senior Center and at 1CONG HDM Office in Coldwater. Clients sign for vouchers and have the opportunity to donate at each distribution. The suggested donation rate is currently \$3.00 per voucher. The menu selections available at the participating restaurants have been approved by a registered Dietitian for breakfast, lunch and dinner items. Participating restaurants have a much wider range of service hours available outside of normal congregare dining hours.

1CONG HDM believes that because of the greater number of menu items and hours of service, combined with a broader outreach in Branch County, that the Restaurant Voucher Program provides a greater choice of meal options and flexible meal times in addition to the congregate setting.

Donations

Client donations are collected in an anonymous manner and are completely voluntary. The suggested donation rate is currently \$3.00 per meal. Donations are collected and counted each day. (please see attachment 7).

Outcomes and Objectives

1CONG HDM's Congregate staff are trained on additional community resources and attend community meetings to learn about other programs and services to be able to better refer clients. 1CONG HDM's Congregate program will provide participants with nutrition information, assistance and connections to additional resources and socialization. 1CONG HDM utilizes a database, CAREeVantage, which not only stores participant information, but allows us to evaluate program data and outcomes.

1CONG HDM will achieve the outlined goals/objectives above, reporting successful outcomes and measurements as indicated.

Person Centered Approach

As stated in the 1CONG HDM Community 2019-21 Strategic Plan our values include:

We are committed to our clients, staff and communities through:

- **Caring:** We believe in treating all people with dignity and respect. We believe all people can achieve success and increased independence.
- **Service:** We believe in meeting the individual needs of those we serve. We believe in providing responsive and supportive services.

- **Action:** We believe in being responsible and trustworthy stewards of our resources. We believe in immediate action to prevent and resolve concerns. We believe in being an active community partner who advocates for the people that we serve.

Additionally 1CONG HDM will provide a person centered approach in the Congregate and Restaurant Voucher Programs by offering clients greater choice in menu items and locations as well as days and times of service. Clients will be encouraged to participate in the Project Council and to provide input to program staff through the use of surveys and daily interactions. Staff is trained to assist clients with referrals for other needed services and programs.

B. ACCESS/UTILIZATION/QUALITY CONTROL

1. Does the agency participate in collaborative activities to enhance the lives of older adults and/or their families? Please describe. Explain which organizations you coordinate service(s) with most frequently and why. Will you collaborate with any particular entity for these (this) grant? Include an explanation of when referrals are made. How are services with multiple providers coordinated?

1CONG HDM is involved in numerous partnerships and collaborations with various community agencies throughout every 1CONG HDM program. For those relevant to serving seniors:

- 1CONG HDM partners with AARP and Michigan Works as work placement sites for employment programs.
- 1CONG HDM has collaborative relationships with other area organizations that donate services and resources such as the United Methodist Church. Church members gather life necessities like toiletries, household products and pet supplies, and donate care bags to HDM clients throughout the year.
- 1CONG HDM partners with Coldwater Church of Christ for congregate meal site.

Partnerships and Collaborations for referrals and resource coordination:

- 1CONG HDM is currently contracted with AAA III-C for HDM and Congregate meal service.
- 1CONG HDM collaborates with AAIII-C to distribute Senior Project Fresh vouchers.
- 1CONG HDM collaborates with local health care providers for referral and resource coordination.
- 1CONG HDM is a member of the Branch County Community Network.
- 1CONG HDM has a partnering relationship with Adult Protective Services to coordinate referrals and resources.

- 1CONG HDM continuously establishes new and innovative partnerships and collaborations designed to better serve all customers.

2. Explain the criteria your agency uses in determining service priority for when demand exceeds resources. How are waiting lists established (if appropriate)? Do you have a Waiting List Policy/Procedure? If so, please include it with the proposal.

In the event that the demand for the Congregate Dining Service and the Restaurant Voucher Program provided by 1CONG HDM exceeds the funding available, a wait list procedure will be implemented. This procedure will first reduce the amount of vouchers distributed in order to allow the Congregate Dining Site and Restaurant Meal Voucher Program to continue to provide service without a disruption. If after this the demand still exceeds, funding the Meal Voucher Distribution may be further reduced or suspended. If after this the demand still exceeds funding, a waitlist will be established for the Congregate Meal Service and prioritized based on social, functional, and economic need. In addition, if demand were to exceed resources, 1CONG HDM would consult with AAA III-C to evaluate congregate participation and explore alternative options to leverage other resources (please see attachment 8)

3. How will you prioritize/target services to older adults in the greatest social and economic need with substantial emphasis given to low income and minority individuals? How will you coordinate services and prioritize serving Community Living Program participants referred to you by the Area Agency on Aging IIIC? Please include how your organization will address accessibility of services for and outreach to minority groups including black, indigenous, and people of color and LGBTQ+ communities.

Participation is targeted towards those in greatest social and economic need, with an emphasis on low-income and minority individuals. 1CONG HDM is an organization that continues to serve exactly this population.

Congregate participants are of greatest social need, as they are often isolated and live alone. Currently, 40% of congregate participants we serve live alone. Although congregate eligibility is not determined by income, we request income information on a voluntary basis in order to evaluate that we are serving those in greatest economic need. Many clients refuse to provide this information.

In order to access congregate services, an intake form is completed on-site. If the person is determined eligible, meals may begin that day. The Intake form was created according to information required by OSA in accordance with Operating Standards. This form is used to determine and verify eligibility.

Those ineligible for a congregate meal under OSA standards are offered the opportunity to purchase a meal at full price.

1CONG HDM is an equal opportunity provider. 1CONG HDM will target services to low-income and minority individuals through outreach in geographic areas with high concentrations of these individuals, such as senior housing complexes and low-income neighborhoods. 1CONG HDM also has a unique position in that we serve hundreds of low-income and minority individuals throughout other programs. These programs serve as a venue for additional outreach and referrals. 1CONG HDM will also direct outreach to additional organizations that serve low-income and minority individuals to establish partnerships to promote services. The United States Census Bureau shows that for Branch County, 94.3% of the total population is Caucasian so the minority number will continue to be low.

1CONG HDM's vision is to be a leader that provides respected and excellent programing by using data to drive decision. The agency endeavors to be a model of excellence that attracts unity with community partners and clients. The agency's goal is to be vibrant and nimble, responding to the changing client and community needs.

As part of this mission and vision, we are committed to providing excellent services to all individuals, regardless of race or demographic. We will continue to be thoughtful in service delivery and policies that create inclusion and access. We are committed to diversity in our staffing and board and will continue to provide training in equity and diversity.

4. How will you promote/market/advertise the service(s) which you are proposing to the public and target audience? Explain specific marketing techniques and resources. Please address the availability of and/or need for translation services to assure access to services.

1CONG HDM promotes and advertises Congregate Meals through a variety of media outlets and utilizes several strategies.

- Published literature, individual conversations and brochures that are distributed throughout the community including: 278-SAFE, Adult Protective Services, other human service and aging resource organizations.
- Participation in area health and senior fairs.
- Promotion internally across other 1CONG HDM programs.
- 1CONG HDM participates in several local collaborative bodies/committees that often serve as an outlet for service promotion and education.

- Presentations are given throughout the community to promote, educate, and recruit for participants and volunteers for Congregate. Examples include, but are not limited to: local colleges, high schools, Rotary clubs, for-profit businesses, and retirement organizations.
- 1CONG HDM encourages seniors to market the program among their social networks.
- Social media outlets such as Facebook and Twitter, as well as the 1CONG HDM website.

1CONG HDM will take reasonable steps to ensure that persons with Limited English Proficiency (LEP) have meaningful access and an equal opportunity to participate in our services, activities, programs and other benefits. The policy of 1CONG HDM is to ensure meaningful communication with LEP clients and their authorized representatives. All interpreters, translators and other aids needed to comply with this policy shall be provided without cost to the person being served, and clients and their families will be informed of the availability of such assistance free of charge. Full LEP policy is attached (please see attachment 9).

Marketing materials, program materials, and press releases include the statement “Funded by Area Agency on Aging III-C and Office of Services to the Aging” at a minimum.

5. Discuss how your agency assures the quality of the service(s) provided. Do you use a recognized quality improvement process? How do you maintain consistent quality of care as you work with individuals and their family? Is quality assurance incorporated in program job descriptions? Please address how you implement staff training. Please share policies/procedures related to quality improvement/assurance.

1CONG HDM has multiple layers of program evaluation, quality control, and improvement that infiltrate the program from agency level through to the customer.

- 1CONG HDM contracts an outside auditing firm to complete an agency-wide audit annually. Results of this audit are shared with all funding entities. (In the event of areas of concern, issues are immediately corrected and documented in a Plan of Corrective Action.)
- A Community Needs Assessment is completed every three years and is used in agency-wide strategic planning.
- AAA III-C conducts annual monitoring reviews of the Congregate Meals program. (In the event of areas of concern, issues are immediately corrected and documented in a Plan of Corrective Action.)

- On a quarterly basis ICONG HDM Directors perform an in-house Risk Management Assessment on each agency program. This assessment includes: program compliance with grant and agency procedures and protocols; review of monitoring concerns or issues, such as temperature logs; and reporting and data system accuracy.
- The Health Department completes inspections every six months of the agency's kitchen facilities to verify that the facility is maintained in a clean and safe environment, this is especially vital when preparing meals for at-risk populations. (In the event of areas of concern, issues are immediately corrected and documented in a Plan of Corrective Action.) All inspection reports are shared with AAA III-C.
- Congregate management staff completes internal audits of the congregate program, including site inspections, file review, and internal data review and analysis.
- Feedback from customers is the most important piece of the quality assurance model. This is done in several ways. Staff encourage and solicit feedback throughout the year. First, the customer completes an annual survey. Modifications to program delivery are made accordingly, if feasible and allowable under the OSA Operating Service Standards and AAA III-C guidelines. Second, clients are encouraged to attend Project Council meetings to offer feedback. Third, staff encourage customers to call the office or communicate any comments to their site supervisor on a daily basis. All comments are recorded and addressed if needed.
- Adequate and quality training of staff is another vital aspect of assuring quality program delivery. At hire, staff receives orientation and training pertinent to program guidelines and procedures. In addition, there are two department trainings per year that cover topics including, but not limited to: the aging network, the aging process, ethics, elder abuse, neglect, and exploitation, mandated reporting, emergency procedures, maintenance of records and files, person-centered planning, customer service, confidentiality, food safety, universal precautions, and incident/accident reporting. Additional training is provided at regular weekly, monthly, or quarterly staff meetings. Staff also regularly attends Office of Services to the Aging (OSA) or AAA sponsored trainings and workshops.
- Staff is hired in compliance with AAA III-C hiring guidelines and requirements such as completing background checks and drug screens. Thereafter, staff receives annual performance reviews.

- Cost comparisons of vendors are completed at a minimum of every three years in order to evaluate expenses, and changes are made accordingly. In addition, raw food cost is constantly monitored and reviewed. Each meal is costed out and meals must meet a monthly average cost target.

C. ORGANIZATIONAL CAPABILITY

1. Describe the experience your agency has in administering similar programs.

1CONG HDM operates many programs which serve older adults such as: Senior Transportation, Home Delivered and Congregate Meals, Senior Minor Home Repair, Senior Home Heating Assistance, the Foster Grandparent Program, Supportive Services for Veteran Families and Commodities Food Distribution. In addition, the agency administers programs that provide services to low-income families of all ages from the Head Start/Early Head Start programs to Home Repair and Weatherization. Each one of these programs is operated under grant requirements specific to the funding source. The funding sources and outside auditors regularly monitor the agency in order to assure compliance with all program standards.

2. Does your agency operate other programs within Branch or St. Joseph Counties? Does your agency provide services to populations other than 60+? Describe.

1CONG HDM's mission is carried out through numerous programs, in Branch and St. Joseph Counties, with three major program areas:

Education and Children's Services, which oversees:

- Head Start (St. Joseph, Calhoun and Barry Counties) provides a quality educational and social experience for children of low- to moderate- income families ages 3 to 5 years.
- Early Head Start (St. Joseph, Calhoun and Barry Counties) provides full year/full day childcare for employed, low-income families with children from birth to three years of age, and offers services to expectant mothers.

Programs, which oversees:

- Commodities Supplemental Food Program (CSFP) provides nutritious food for qualified seniors 60 years of age and older on a monthly basis
- The Emergency Food Assistance Program (TEFAP) provides low-income individuals and families with food every three months.

- Home Delivered Meals program provides homebound seniors (who are unable to cook and shop for themselves) with nutritious meals Monday through Friday
- Congregate Meal Program provides seniors 60 years of age and older with hot, nutritious meals during the week.
- Head Start and Early Head Start meal program provides children in the program with nutritious meals and snacks during their day.
- Home Weatherization program provides weatherization services to save energy and lower utility bills for those meeting the low-income guidelines.
- Minor Home Repair and Emergency Repair for low-income senior homeowners.
- Transportation provides vans, with and without lifts, which are available to transport seniors over age 60 and disabled persons 18 years of age and over to medical appointments, employment sites, congregate meal centers, grocery shopping, and other necessary trips in Calhoun County.
- Supportive Services for Veteran Families focuses on helping individuals and families access and sustain permanent rental housing, increase income through employment and benefits, and address issues that can interfere with their housing stability.
- Lead Safe Program provides lead abatement in homes where a child is present that has an elevated blood lead level.

Development which oversees:

- Emergency Services assists low-income families and individuals with eviction prevention and utility assistance.
- Foster Grandparent Program provides an opportunity for low-income senior citizens to love, nurture, and educate at-risk and special needs children in school or childcare environments.

3. Are Older American's Act funds the primary fund source for the program? If not, what percentage is provided by other funds? What is the source of those funds & how will they be used? Discuss the primary funding source available to support programming of the proposed project.

Primarily the Congregate and Voucher Meal program will be funded by state and federal grants provided by the Area Agency on Aging. The total budget for this program is \$57,842. Funding is provided by program income of \$3,000 and volunteer in-kind hours and space provided valued at \$6,309, which is 13% of the overall budget for this program. In addition other resources from 1CONG

HDM CSBG funding, in the amount of \$14,901, are expected to be needed to support the proposed number of units.

This budget is prepared with the assumption that Home Delivered Meal and Congregate and Voucher Meal program funding are both received.

See Congregate Meal Program Attachment Packet

Home Delivered Meal Program Narrative

OBJECTIVES/PROGRAM PLAN

This plan is predicated upon receiving both Home Delivered Meal and Congregate Meal program awards.

After reviewing the service specific minimum standards, describe in detail your agency's plan to implement the proposed project. Include information about unique and innovative aspects that will contribute to the overall success of the program.

Provide program outcomes for each service that your agency is applying for. Objectives must be measurable, verifiable, and time-limited. A format including specific outcomes, activities and time lines is preferred. Outcomes will be monitored at least annually by the AAA.

Provide an overview of your agency's intent to utilize a more person-centered approach to service provision. Also include the person-centered philosophy/values that your organization holds or may develop if they are not already in practice currently.

Program Eligibility

The Home Delivered Meal (HDM) program will serve participants meeting specific eligibility criteria (OSA Operating Standards, III B-5):

- Seniors age 60 years and over, the spouse of a person age 60 years and over, or an individual with disabilities who resides in a non-institutional household with a person eligible for and receiving home delivered meals.
- Homebound
- Unable to participate in congregate dining, due to physical or emotional difficulties
- Unable to obtain food or prepare complete meals
- No adult living in the same residence or vicinity that is able or willing to prepare meals
- Dietary needs can be appropriately met by the program
- Must be able to feed himself/herself
- Must agree to be home when meals are delivered or provide notification if absence is unavoidable
- Spouse or unpaid caregiver may receive a meal if it is determined to be in the best interest of the client.

Capacity

Meals will be available to eligible participants at a minimum of five days per week and up to seven days per week, depending upon need and funding. Three meals per day may also be available to participants depending upon need and funding. Currently, funding only allows for one meal per day up to five days per week based on participant need. However, 1CONG HDM has the capacity to support additional funding (if available) and an increase in meal production up to 3 meals per day, seven days per week.

Staffing

1CONG HDM is a Drug Free Work Place and Equal Opportunity Employer, which recruits, hires, and trains staff accordingly. Potential candidates receive background checks, drug screens, and reference checks as a requirement of hire and in accordance with AAA III-C policies. New HDM staff receives agency orientation and specific training related to the HDM program. Topics include, but are not limited to: introduction to the HDM program, the aging network, the aging process, identification of abuse, neglect, exploitation, mandated reporting, food safety, universal precautions, ethics, confidentiality, accident reporting, and emergency procedures. Staff receive additional training at least twice per year during department in-service trainings and attend staff meetings weekly or as needed. Policy and Procedure Manuals for the HDM program are maintained and used for training, which are easily accessible to staff for reference.

1CONG HDM has a comprehensive Employee Handbook that clearly outlines additional employee policies and procedures. This can be available upon request.

Menu development and Nutrition Education

1CONG HDM contracts with a Registered Dietician to create the menu (please see attachment 1) in accordance with OSA Operating Standards and meets 1/3 of the Recommended Daily Allowance (RDA). Each monthly menu highlights a featured food (seasonally appropriate) and provides nutritional education relevant to that item (please see attachment 2). Education provided may include nutritional content, value, how to prepare the item, and recipes inclusive of the featured food. We also provide education when introducing new food items so that participants can make informed decisions regarding their nutrition.

The majority of meals are home-made and incorporate a variety of fresh or frozen fruits and vegetables, and whole grains. All meals are low in sodium and fat. Meals are a combination of comfort foods and ethnic foods. Examples of home-made comfort foods include: meatloaf, turkey stew, chili, and beans with ham. Examples of home-made ethnic foods include: sweet and sour chicken, tacos and baked ziti.

Meal Production

Home Delivered Meals are prepared in the 1CONG HDM Kitchen which is owned and located at 85 Bennett St. in Battle Creek, Michigan. This kitchen is licensed by the local Health Department and meets all OSA requirements (please see attachment 3). Meals are cooked and served each day by kitchen staff and numerous volunteers. All kitchen staff are certified in food safety through the local Health Department. Volunteers also receive food safety training either by 1CONG HDM kitchen staff or through the local Health Department.

Meals are prepared according to standardized recipes, and are safely prepared, packaged, and delivered according to the current Michigan Food Code. A copy of the Michigan Food Code and established Standard Operating Procedures are maintained in the kitchen and are available for reference. Meals are served within four hours of preparation and temperature is monitored and recorded throughout the process in compliance with food safety regulations. Product is dated at time of receipt and preparation in order to ensure its use before expiration. Product is also used and rotated according to the First In, First Out (FIFO) inventory control method in order to ensure quality and safety, and to reduce waste.

Staff prepares meals according to appropriate serving size indicated in the OSA Operating Standards. Staff receives training on portion control and use standardized utensils to ensure correct portions.

The majority of food product is purchased through a group purchasing contract that has been determined to be the most cost effective purchasing model. The main vendor in this contract is Gordon Food Service (GFS). 1CONG HDM documents food cost and inventory monthly in order to ensure cost effectiveness and control waste.

Participant Intake and Assessment

Participants for HDM can be self-referred or referred by a friend, family, physician, care provider, other agency, neighbor, or basically anyone. All initial intakes are completed over the phone by

completing a simple eligibility questionnaire and intake form (please see attachment 4). If determined eligible at this time, meals can start as soon as the next delivery day.

According to OSA Operating Standards, once a participant begins receiving meals, an in-home assessment must be completed within 14 days in order to verify the need and eligibility for HDM services. Thereafter, reassessments are completed every six months. The ICONG HDM Branch County Program Coordinator is responsible for completing an in-depth assessment in collaboration with the participant utilizing a person-centered approach. The Program Coordinator and the participant complete the assessment tool together and identify strengths, needs, and requests for additional services. The Program Coordinator is then responsible for providing referrals to the participant (please see attachment 5).

Delivery

Meals will be delivered by volunteer staff at a minimum of three (3) days per week. Delivery drivers are trained on food safety and utilize temperature control delivery equipment to maintain proper temperature.

Drivers, however, are trained to deliver more than a meal. Drivers deliver smiles, conversation, friendship, education, resources, and peace of mind each day. Currently, approximately 60% of HDM participants live alone; the driver is often the only person the participant sees in a day. According to the most recent survey of HDM participants, 70% say interaction with their driver is extremely important to them. This verifies that the relationship with the driver is an important aspect of enhancing the social life of homebound seniors. In addition to socialization, drivers serve as an access point and connection to additional resources and education. They often deliver literature and communication about community events, resources, or fraud alerts. They receive in-depth training at hire and twice per year on several topics relevant to serving seniors including, but not limited to: identification of abuse, neglect, exploitation, mandated reporting, the aging network, the aging process, and emergency procedures. Educating delivery staff on these topics further enhances the HDM program. As the driver develops a rapport with the participant and becomes familiar with their needs, they can easily recognize when additional support is needed. Drivers serve as a liaison and advocate for the participant, relaying concerns or requests to the nutrition office for follow-up, resulting in referrals to additional resources such as transportation programs.

Donations

At the beginning of service, seniors are informed that donations are accepted, completely voluntarily and at their own determination. Each month, customers are provided with a statement that summarizes the meals provided along with a suggested donation rate (\$3.00 per meal). The statement clearly reads that donations are completely voluntary and services will not be denied or adjusted based on donations received. The statement also includes a postage-paid return envelope that allows the customer to donate in a confidential manner, honoring the seniors' economic contributions (please see attachment 6).

Outcomes and Objectives

1CONG HDM's HDM program will provide nutrition, education, information and assistance, connections to additional resources, and socialization to participants. This is accomplished and measured throughout participation in the program. 1CONG HDM utilizes a database, CAREeVantage, which not only stores participant information, but also allows us to evaluate program data and outcomes. 1CONG HDM monitors participants' nutritional risk, ADL's, meal plans, referrals, participant feedback, and demographic information through the CAREeVantage database.

1CONG HDM will achieve the outlined goals objectives below, reporting successful outcomes and measurements as indicated.

Additional Outcomes and Measurements

- 1CONG HDM will serve between 17,000 and 18,000 meals to approximately 80-100 seniors.
- 1CONG HDM will target low-income and minority seniors and increase participation of these individuals.
- 1CONG HDM will provide nutrition education to 100% of participants.
- 1CONG HDM will decrease isolation and increase socialization to 100% of participants.
- 1CONG HDM will increase access to fresh fruit and vegetables. This will occur through meals provided and partnering with AAA III-C to administer Senior Project Fresh coupons to participants and through partnerships with Community Organizations who donate fresh food items.
- 1CONG HDM partners with Branch Area Food Pantry to supply weekend meal boxes for those in the greatest need.

- 1CONG HDM will use person-centered planning to support the seniors' choices to 100% of participants.
- 1CONG HDM will continue to strengthen and develop innovative partnerships and collaborations through research and participation in local initiatives.

Summary and Highlights

- Participants can choose a combination of milk, no milk, lactose-free milk, chopped or pureed meals.
- Registered Dietitian to create menus and provide nutrition education and counseling
- All participants have increased access to information and resources in their home due to assessment process
- Strong partnerships with the Aging Network, other area non-profits, and for-profit businesses
- Consistent and reliable delivery drivers trusted by seniors
- Staff are trained on topics relevant serving seniors with heavy emphasis on recognizing and reporting abuse, neglect, and exploitation
- Dedicated to continuous improvement and innovation.

Person Centered Approach

As stated in the 1CONG HDM Community 2019-21 Strategic Plan our values include:

We are committed to our clients, staff and communities through:

- **Caring:** We believe in treating all people with dignity and respect. We believe all people can achieve success and increased independence.
- **Service:** We believe in meeting the individual needs of those we serve. We believe in providing responsive and supportive services.
- **Action:** We believe in being responsible and trustworthy stewards of our resources. We believe in immediate action to prevent and resolve concerns. We believe in being an active community partner who advocates for the people that we serve.

1CONG HDM will provide a person centered approach in the Home Delivered Meal program by interacting daily with clients through meal delivery. Additionally, staff will provide referrals to other

services or programs that may meet a client's needs. Staff will encourage feedback from clients regarding menu items or delivery issues and will be integral in the assurance of a client's wellbeing.

B. ACCESS/UTILIZATION/QUALITY CONTROL

1. Does the agency participate in collaborative activities to enhance the lives' of older adults and/or their families? Please describe. Explain which organizations you coordinate service(s) with most frequently and why. Will you collaborate with any particular entity for these (this) grant? Include an explanation of when referrals are made. How are services with multiple providers coordinated?

1CONG HDM is involved in numerous partnerships and collaborations with various community agencies throughout every program 1CONG HDM program. For those relevant to serving seniors:

- 1CONG HDM partners with AARP and Michigan Works as work placement sites for employment programs.
- 1CONG HDM has collaborative relationships with other area organizations that donate services and resources.

Partnerships and Collaborations for referrals and resource coordination:

- 1CONG HDM is currently contracts with AAA III-C for HDM and Congregate.
- 1CONG HDM collaborates with local health care providers for referral and resource coordination.
- 1CONG HDM is a member of the Branch County Collaborative Network.
- 1CONG HDM has a collaborative relationship with the Commission on Aging.
- 1CONG HDM has a partnering relationship with Adult Protective Services to coordinate referrals and resources.
- 1CONG HDM continuously establishes new and innovative partnerships and collaborations designed to better serve all clients.

2. Explain the criteria your agency uses in determining service priority for when demand exceeds resources. How are waiting lists established (if appropriate)? Do you have a Waiting List Policy/Procedure? If so, please include it with the proposal.

In the event that demand exceeds resources, a waitlist will be established and prioritized based on social, functional, and economic need. An assessment is completed over the phone that utilizes a Care Management Screening tool, Nutritional Risk Assessment, and identifies other prioritization factors such as income, race, and urgency of need, risk status, disability status, and other in-home services.

Participants are assigned priority based on the factors above. A waitlist is maintained that includes the name of the person seeking service, date service is initially requested, the service, and location, and priority level. Service is provided to those determined to be highest priority as resources become available. For those that remain on the waitlist, they are contacted once per month to verify the service is still needed and to update information. The person seeking service is also offered a cost sharing option, in which they can choose to pay full price of the meal until they can be served with AAA resources (please see attachment 7).

3. How will you prioritize/target services to older adults in the greatest social and economic need with substantial emphasis given to low income and minority individuals? How will you coordinate services and prioritize serving Community Living Program participants referred to you by the Area Agency on Aging IIIC? Please include how your organization will address accessibility of services for and outreach to minority groups including black, indigenous, and people of color and LGBTQ+ communities.

Participation is targeted towards those in greatest social and economic need with an emphasis on low-income and minority individuals. 1CONG HDM is an organization that serves exactly this population, as indicated in the Agency Overview section.

Home Delivered Meals customers are of greatest social need as they are homebound, isolated, and often live alone. Currently, approximately 60% of HDM participants we serve live alone. Although HDM eligibility is not determined by income, we request income information on a voluntary basis in order to evaluate that we are serving those in greatest economic need. However, very few participants provide this information.

To access HDM services, an intake and eligibility questionnaire is completed over the phone. If determined eligible, meals may begin the next delivery day. Within 14 days, an in-home assessment is completed by the 1CONG HDM Assessment Specialist to verify eligibility according to OSA Operating Standards (Section III B-5). Reassessments are completed every six months. Intake and Assessment forms collect more information than is required by OSA Operating Standards, General Requirements for In-Home Service Programs (Section III-B, p. 32). These forms and the OSA Operating Standards are used to determine and verify eligibility.

1CONG HDM will target services to low-income and minority individuals through outreach in geographic areas with high concentrations of these individuals such as senior housing complexes and low-income neighborhoods. 1CONG HDM also has a unique position in that we serve hundreds of

low-income and minority individuals throughout Branch County with other agency programs. These programs serve as a venue for additional outreach and referrals. 1CONG HDM also directs outreach to other organizations that serve low-income and minority individuals to establish partnerships to promote services. Program outreach is provided through word of mouth, brochures and church bulletins.

1CONG HDM's vision is to be a leader that provides respected and excellent programming by using data to drive decision. The agency endeavors to be a model of excellence that attracts unity with community partners and clients. The agency's goal is to be vibrant and nimble, responding to the changing client and community needs.

As part of this mission and vision, we are committed to providing excellent services to all individuals, regardless of race or demographic. We will continue to be thoughtful in service delivery and policies that create inclusion and access. We are committed to diversity in our staffing and board and will continue to provide training in equity and diversity.

4. How will you promote/market/advertise the service(s) which you are proposing to the public and target audience? Explain specific marketing techniques and resources. Please address the availability of and/or need for translation services to assure access to services.

1CONG HDM promotes and advertises Home Delivered Meals through a variety of media outlets and utilizes several strategies.

- Published literature, individual calls and brochures that are distributed throughout the community including in 278-SAFE, Adult Protective Services, other human service and aging resource organizations.
- Participation in area health and senior fairs.
- Promotion internally across other 1CONG HDM programs.
- 1CONG HDM participates in several local collaborative bodies/committees that often serve as an outlet for service promotion and education.
- Presentations are given throughout the community to promote, educate, and recruit for participants and volunteers for HDM. Examples include, but are not limited to: local colleges, high schools, Rotary clubs, for-profit businesses, and retirement organizations.
- 1CONG HDM encourages seniors to market the program among their social networks.
- Social media outlets such as Facebook and Twitter, as well as the 1CONG HDM website.

- Church bulletins.

1CONG HDM will take reasonable steps to ensure that persons with Limited English Proficiency (LEP) have meaningful access and an equal opportunity to participate in our services, activities, programs and other benefits. The policy of 1CONG HDM is to ensure meaningful communication with LEP clients and their authorized representatives. All interpreters, translators and other aids needed to comply with this policy shall be provided without cost to the person being served, and clients and their families will be informed of the availability of such assistance free of charge. Full LEP policy is attached (Please see Attachment 8).

All published marketing, program materials, and press releases include the statement, “Funded by Area Agency on Aging III-C and Office of Services to the Aging” at a minimum.

5. Discuss how your agency assures the quality of the service(s) provided. Do you use a recognized quality improvement process? How do you maintain consistent quality of care as you work with individuals and their family? Is quality assurance incorporated in program job descriptions? Please address how you implement staff training. Please share policies/procedures related to quality improvement/assurance.

1CONG HDM has multiple layers of program evaluation, quality control, and improvement that infiltrate the program from agency level through to the customer.

- 1CONG HDM contracts an outside auditing firm to complete an agency-wide audit annually. Results of this audit are shared with all funding entities including AAA III-C.
- A Community Need Assessment is completed every three years and is used in agency-wide strategic planning.
- AAA III-C conducts annual monitoring reviews of the Home Delivered Meals program.
- 1CONG HDM completes individual program reviews in which agency staff outside of the specific program perform in-depth review of processes and procedures to determine if there are any adjustments that can be made to improve program delivery or create efficiencies. Bringing in an outside perspective often leads to innovative and creative ideas and improvements.
- The Health Department completes inspections every six months of kitchen facilities to verify that the environment is a clean and safe, which is especially vital when preparing meals for at-risk populations.
- HDM management staff completes internal audits of the HDM program including kitchen inspections, file review, and internal data review and analysis. For example, each month, a report is created and reviewed that indicates how many HDM customers ended service and the

reason for end of service. Reasons may include improved health or that the participant moved to an assisted living facility. Evaluating this data allows for monitoring program outcomes.

- Feedback from customers is the most important piece of the quality assurance model. This is done in several ways, as feedback is always encouraged and solicited throughout the year. First, annual surveys are completed each year by the customer. Modifications to program delivery are made accordingly, if feasible and allowable under the OSA Operating Service Standards and AAA III-C guidelines. Second, there is designated space on the monthly donation statement that requests comments/suggestions, which can be mailed with the provided envelope. Third, customers are encouraged to call the office or communicate any comments to their driver on a daily basis. All comments are recorded and addressed, if needed. For example, particular food products will be eliminated from the menu or served more frequently, depending on customer feedback. Another example involves feedback regarding the importance of customers knowing and feeling comfortable with their delivery driver. Customers identified that interaction and rapport with their driver was extremely important to them and that if their driver changes, they want to know in advance. Therefore, if routes change or if there are staff changes, customers are informed in advance, when possible.
- Adequate and quality training of staff is another vital aspect of assuring quality program delivery. At hire, staff receives orientation and training pertinent to program guidelines and procedures. In addition, there are two department trainings per year that cover topics including, but not limited to: the aging network, the aging process, ethics, elder abuse, neglect, and exploitation, mandated reporting, emergency procedures, maintenance of records and files, person-centered planning, customer service, confidentiality, food safety, universal precautions, and incident/accident reporting. Additional training is provided at regular weekly, monthly, or quarterly staff meetings. Staff also regularly attends Office of Services to the Aging (OSA) or AAA sponsored trainings and workshops.
- Staff are hired in compliance with AAA III-C hiring guidelines and requirements such as completing background checks and drug screens. Thereafter, staff receive annual performance reviews.

Cost comparisons of vendors are completed at a minimum of every three years in order to evaluate expenses and changes are made accordingly. In addition, raw food cost is constantly monitored and reviewed

C. ORGANIZATIONAL CAPABILITY

1. Describe the experience your agency has in administering similar programs.

1CONG HDM operates many programs which serve older adults such as: Senior Transportation, Home Delivered and Congregate Meals, Senior Minor Home Repair, Senior Home Heating Assistance, the Foster Grandparent Program and Commodities Food Distribution. In addition, the agency administers programs that provide services to low-income families of all ages from the Head Start/Early Head Start programs to Home Repair and Weatherization. Each one of these programs is operated under grant requirements specific to the funding source. The funding sources and outside auditors regularly monitor the agency in order to assure compliance with all program standards.

2. Does your agency operate other programs within Branch or St. Joseph Counties? Does your agency provide services to populations other than 60+? Describe.

1CONG HDM's mission is carried out through numerous programs, in Branch and St. Joseph Counties, with three major program areas:

Education and Children's Services, which oversees:

- Head Start (St. Joseph, Calhoun and Barry Counties) provides a quality educational and social experience for children of low- to moderate- income families ages 3 to 5 years.
- Early Head Start (Calhoun, Barry Counties and St Joseph) provides full year/full day childcare for employed, low-income families with children from birth to three years of age, and offers services to expectant mothers.

Programs, which oversees:

- Commodities Supplemental Food Program (CSFP) provides nutritious food for qualified seniors 60 years of age and older on a monthly basis
- The Emergency Food Assistance Program (TEFAP) provides low-income individuals and families with food every three months.
- Home Delivered Meals program provides homebound seniors (who are unable to cook and shop for themselves) with nutritious meals Monday through Friday
- Congregate Meal Program provides seniors 60 years of age and older with hot, nutritious meals during the week.
- Head Start and Early Head Start meal program provides children in the program with nutritious meals and snacks during their day.
- Home Weatherization program provides weatherization services to save energy and lower utility bills for those meeting the low-income guidelines.

- Minor Home Rehabilitation provides home rehabilitation and emergency repair for low-income homeowners.
- Transportation provides vans, with and without lifts, which are available to transport seniors over age 60 and disabled persons 18 years of age and over to medical appointments, employment sites, congregate meal centers, grocery shopping, and other necessary trips in Calhoun County.
- Supportive Services for Veteran Families focuses on helping individuals and families access and sustain permanent rental housing, increase income through employment and benefits, and address issues that can interfere with their housing stability.
- Lead Safe Program provides lead abatement in homes where a child is present that has an elevated blood lead level.

Development which oversees:

- Emergency Services assists low-income families and individuals with eviction prevention and utility assistance.
- Foster Grandparent Program provides an opportunity for low-income senior citizens to love, nurture, and educate at-risk and special needs children in school or childcare environments.

3. Are Older American's Act funds the primary fund source for the program? If not what percentage is provided by other funds? What is the source of those funds & how will they be used? Discuss the primary funding source available to support programming of the proposed project.

Primarily the Home Delivered Meal program will be funded by state and federal grants provided by the Area Agency on Aging. The total budget for this program is \$168,639. Funding is provided by program income of \$5,000 and volunteer driver in-kind hours valued at \$18,826, which is 13% of the overall budget for this program. In addition other resources from ICONG HDM CSBG funding, in the amount of \$49,293, are expected to be needed to support the proposed number of units.

This budget is prepared with the assumption that Home Delivered Meal and Congregate Meal program funding are both received.

See Home Delivered Meal Program Attachment Packet

PART II
Agreement between Applicant Agency and the Region IIIC Area Agency on Aging Upon Submission of Proposal

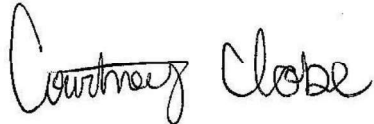
The applicant agency 1CONG HDM, submits this application for a contract award in accordance with the provision of part and the information provided in Parts I and III of this application. The applicant agency understands and agrees that the following provisions are part of the official application and as such become binding upon the conduct of the project subsequent to the award of any funds by the Region IIIC Area Agency on Aging (AAA).

The applicant agency agrees:

1. That the project will be carried out in accordance with the policies and procedures established by the AAA, and the terms and conditions of this application as approved by the AAA in making an award of funds.
2. That where subcontractors are proposed for the operation of one or more components of the proposal, the applicant agency retains full and complete responsibility for the operation of the project in keeping with the policies and procedures established by the AAA for the project. The applicant agency will be held accountable by the AAA for all project expenditures; and will ensure that all expenditures incurred by the sub-contracting agency(ies) will be in accordance with the cost policies and procedures established by the AAA, in keeping with the federal granting agency. Copies of the proposed subcontracts are submitted with the application.
3. To cooperate with the AAA in its efforts toward developing a comprehensive and coordinated system of services for the elderly, by participating in joint planning efforts and other activities mutually agreed upon to meet this goal.
4. To actively seek qualified older persons for paid and volunteer positions on the project.
5. To cooperate and assist in efforts undertaken by the AAA, the Bureau of Aging, Community Living, and Supports, the Administration on Aging, or any other agency or organization duly authorized by any of the preceding to evaluate the effectiveness, feasibility and costs of the project.
6. To conscientiously seek out community resources to be utilized by the aging network and to make such resources known to the AAA and thus all of Region IIIC.
7. To keep records and make reports on forms and containing information as may be required by the AAA.
8. To maintain documents and accounts as well as service records to permit expeditious determination to be made at any time of the status of funds within the award, including the disposition of all monies received from the AAA, and the nature and amount of all charges claimed against such funds.

- 9. That funding provided under the terms of this contract is for providing services to elder individuals as defined in this application only and that no sectarian religious activities will be promoted in whole or in part through use of these funds.
- 10. To accept the responsibility to raise and submit payment of cash match as required by the AAA.

Signature(s) of person(s) authorized on behalf of the applicant agency to commit such agency to the assurances outlined herein:



Signature of Authorized Official

7/29/22

Date

Signature of Authorized Official

Date

**PART III
MINIMUM STANDARDS ASSURANCE**

Any service funded by the Branch-St. Joseph Area Agency on Aging (IIIC) [AAA] must be in compliance with the Aging & Adult Services Agency, AAA service definitions, unit definitions, and minimum service standards for operation except for specific standards for which compliance has been waived by the AAA according to prescribed policy waiver procedures.

I hereby enter this assurance of compliance.

1CONG HDM, (herein called the Contractor),

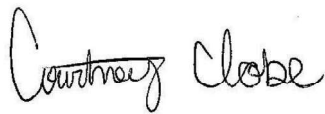
HEREBY ASSURES that the persons involved in implementing the proposal contract have read the minimum standards (standards for each service) on each of the services for which funds are being requested.

FURTHERMORE, the Contractor assures that it is completely in compliance with all standards for the following services: (List all services for which funding is requested.)

- Home Delivered Meals
- Congregate Meal Program
-

This assurance is given in consideration of and for the purpose of obtaining Federal or state funds, contracts, or other financial assistance from the AAA. The Contractor recognizes and agrees that any approved financial assistance will be extended based on agreements made in this assurance and that the AAA shall have the right to seek enforcement of this assurance.

This assurance is binding on the Contractor, its successors, transferees, and assignees.



Signature of Authorized Official

Signature of Project Coordinator (if applicable)

7/29/22
Date

Date

PART IV

**MICHIGAN BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
Assurance of Compliance with section 504 of the Rehabilitation Act of 1973**

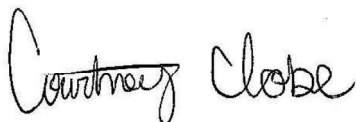
The undersigned recipient of funds from the Michigan Commission and Bureau of Aging, Community Living, and Supports (hereinafter called the "recipient") HEREBY AGREES THAT it will comply with section 504 of the Rehabilitation Act of 1973, as amended (29. U.S.C. 794), all requirements imposed by the applicable HHS regulations (45. C.F.R. Part 84), and all guidelines and interpretations issues pursuant thereto.

Pursuant to 84.5(a) of the regulation (45 C.F.R. 84.5(a)) the recipient gives this assurance in consideration of and for the purpose of obtaining any and all grants, loans, contracts (except procurement contracts and contracts of insurance or guaranty), property, discounts, or other financial assistance extended by the Michigan Bureau of Aging, Community Living, and Supports after the date of this assurance, including payments or other assistance made after such date on applicants for financial assistance that were approved before such date. The recipient recognizes and agrees that such financial assistance will be extended in reliance on the representations and agreements made in this assurance and that the Michigan Bureau of Aging, Community Living, and Supports will have the right to enforce this assurance through lawful means. This assurance is binding on the recipient, its successors, transferees, and assignees, and the person or persons whose signatures appear below are authorized to sign this assurance on behalf of the recipient.

This assurance obligates the recipient for the period during which Federal financial assistance is extended to it by the Michigan Aging, Community Living, and Supports or, where the assistance is in the form of personal property for the period provided for in 84.5(b) of the regulation (45 C.F.R. 84.5(b)).

**Assurance of Compliance with the Department of Health,
Education, & Welfare Regulation Under Title VI of the Civil Rights Act of 1964,
Michigan Handicappers Civil Rights Act of 1976, Elliott-Larsen Civil Rights Act of
1976**

The subcontractor named below HEREBY AGREES THAT it will comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352), the Michigan Handicappers' Civil Rights Act of 1976 (P.A. 220), and The Elliot-Larsen Civil Rights Act of 1976 (P.A. 453, Section 209) and will comply with requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. 80) issued pursuant to that Title to the end that, in accordance with Title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Subcontractor receives Federal or State financial assistance from the Region III-C Area Agency on Aging, and HEREBY GIVES ASSURANCE THAT it will immediately take any measures necessary to effectuate this agreement.



Signature of Authorized Official

7/29/22
Date

ASSURANCE OF COMPLIANCE

ASSURANCE OF COMPLIANCE WITH TITLE VI OF THE CIVIL RIGHTS ACT OF 1964, SECTION 504 OF THE REHABILITATION ACT OF 1973, TITLE IX OF THE EDUCATION AMENDMENTS OF 1972, AND THE AGE DISCRIMINATION ACT OF 1975

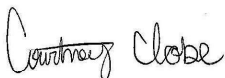
The Applicant provides this assurance in consideration of and for the purpose of obtaining Federal grants, loans, contracts, property, discounts or other Federal financial assistance from the Department of Health and Human Services.

THE APPLICANT HEREBY AGREES THAT IT WILL COMPLY WITH:

1. Title VI of the Civil Rights Act of 1964 (Pub. L. 88-352), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R.), to the end that, in accordance with Title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination under any program or activity for with the Applicant receives Federal financial assistance from the Department.
2. Section 504 of the Rehabilitation Act of 1973 (Pub. L. 93-112), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 84), to the end that, in accordance with Section 504 of that Act and the Regulation, no otherwise qualified handicapped individual in the United Sates shall, solely by reason of his handicap, be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination under any program or activity for with the Applicant receives Federal financial assistance from the Department.
3. Title IX of the Educational Amendments of 1972 (Pub. L. 92-318), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 86), to the end that, in accordance with Title IX and the Regulation, no person in the United States shall, on the basis of sex, be excluded from be excluded from participation in, or be otherwise subjected to discrimination under any program or activity for with the Applicant receives Federal financial assistance from the Department.
4. The Age Discrimination Act of 1975 (Pub. L. 94-135), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. part 91), to the end that, in accordance with the Act and the Regulation, no person in the United States shall, on the basis of age, be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination under any program or activity for with the Applicant receives Federal financial assistance from the Department.

The Applicant agrees that compliance with this assurance constitutes a condition of continued receipt of Federal financial assistance, and that it is binding upon the Applicant, its successors, transferees and assignees for the period during which such assistance is provided. If any real property or structure thereon is provided or improved with the aid of Federal financial assistance extended to the Applicant by the Department, this assurance shall obligate the Applicant, or in the case of any transfer of such property, any transferee, for the period during which the real property or structure is used for a purpose for which Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits. If any personal property is so provided, this assurance shall obligate the Applicant for the period during which it retains ownership or possession of the property. The Applicant further recognizes and agrees the United States shall have the right to seek judicial enforcement of this assurance.

The person or persons whose signature(s) appear(s) below is/are authorized to sign this assurance, and commit the Applicant to the above provisions.



Signature of Authorized Official

1CONG HDM

Name of Applicant or Recipient Agency

Interim CEO

Title of Authorized Official

7/29/22

Date

175 Main Street

Street

Battle Creek, MI 49014

City, State, Zip Code

Form HHS-690 (05/97)

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET SUMMARY

Agency:	Project Title and Budget Period:	Project Title and Budget Period:	Date Prepared:
Redacted	Home Delivered Meals 10/1/22 - 9/30/23	Congregate Meals 10/1/22 - 9/30/23	GAP Filling - Home Delivered Meals
A. Service Category →			
B. Unit Cost	\$ 12.49	\$ 13.77	
C. Grant Unit Cost	\$ 12.49	\$ 13.77	POS
D.			
E. Total Funds Requested →	\$ 144,813	\$ 48,533	\$ 500
F. Local Match Total (13% Required)			
1. Cash			
2. In-Kind	\$ 18,826	\$ 6,309	
G. Program Income	\$ 5,000	\$ 3,000	
H. Total Project Funds	\$ 168,639	\$ 57,842	
I. Other Resources	\$ 49,293	\$ 14,901	
ANALYSIS - N/A			
Total Units Less Other Resources	13,500	4,200	
A. Grant Total	\$ 144,813	\$ 48,533	
Number of Units:	11,593	3,524	
B. Local Match Total (13% required)			
1. Cash (%)			
Number of Units:			
2. In-Kind (%)	\$ 18,826	\$ 6,309	
Number of Units:	1,507	458	
C. Program Income ('i.e. Number of additional units to be provided over contracted levels.)	\$ 5,000	\$ 3,000	
Number of Units:			
Number of Units:	400	218	
D. Other Resources (specify)			
CSBG grant funds	\$ 49,293	\$ 14,901	
Number of Units:	3,946	1,082	

I certify that I am authorized to sign on behalf of the Agency. The budget amounts represent necessary and proper costs for implementing this program.

Redacted

Finance Director

7-29-22

Title

Date

**AREA AGENCY ON AGING REGION IIIC
UNIT COST BUDGET DETAIL**

Agency:	Project Title and Budget Period:	Project Title and Budget Period:	Date Prepared:
Redacted	Home Delivered Meals 10/1/22 - 9/30/23	Congregate Meals 10/1/22 - 9/30/23	GAP Filling - Home Delivered Meals
	<i>Service Category:</i>	<i>Service Category:</i>	<i>Service Category:</i>
EXPENSE CATEGORY			
1. Salaries (specify)	FTE		
	Amount	\$ 71,180	\$ 16,700
2. Fringe Benefits (%Rate)	%		
	Amount	\$ 23,703	\$ 6,600
<input type="checkbox"/> FICA <input type="checkbox"/> Life <input type="checkbox"/> Dental <input type="checkbox"/> Unemp. <input type="checkbox"/> Vision <input type="checkbox"/> WorkComp <input type="checkbox"/> Retirement <input type="checkbox"/> Hearing <input type="checkbox"/> Hosp. <input type="checkbox"/> Other			
3. Travel:			
<i>Staff:</i>			
Rate/mile_.625__x_1000_Miles →	\$ 565	\$ 60	
<i>Volunteer:</i>			
Rate/mile_.625__x_18,000_Miles →	\$ 11,250		
4. Equipment	\$ -		
5. Raw Food	\$ 36,000	\$ 7,999	
6. Supplies	\$ 2,000	\$ 800	
7. Occupancy:			
Office Space \$_____per sq.foot →	\$ 4,950	\$ 6,459	
Utilities if not included in above →	\$ 4,000	\$ 1,000	
8. Communications (list)			
Advertising, Telephone, Cell Phone, Postage	\$ 3,000	\$ 800	
9. Service Contracts (list)			
Contracted employees Restaurants (Voucher Program) 1,400 units @ \$9.50/meal		\$ 13,300	
10. Training:			
11. Other (specify)* Liability Insurance			
Indirect Costs @ federally approved rate of 8.7%	\$ 11,991	\$ 4,124	
Unmet Needs		\$ -	\$ 500
12. Total Cost (add sections 1-11)	\$ 168,639	\$ 57,842	\$ 500
13. Total Units Projected	13,500	4,200	
14. Total Unit Cost (Line 12 Divided by Line 13)	\$ 12.49	\$ 13.77	#DIV/0!

* Indirect costs may only be included if and only at the federally approved rate for your organization.

**AREA AGENCY ON AGING REGION IIIC
PROJECTED MONTHLY EXPENDITURES**

AGENCY: Redacted

SERVICE: Home Delivered Meals 10/01/2022 - 09/30/2023

	OCT	NOV	DEC	QTR 1	YTD	JAN	FEB	MAR	QTR 2	YTD
Cost	12,068	12,068	12,068	36,204	36,204	12,068	12,068	12,068	36,204	72,408
Match	1,569	1,569	1,569	4,707	4,707	1,569	1,569	1,569	4,707	9,414
Income	400	400	450	1,250	1,250	450	400	400	1,250	2,500
Unduplicated Clients	6	6	6	18	18	6	6	6	18	36
Units	33	33	37	103	103	33	33	33	99	202
Other Resources	4,108	4,108	4,108	12,324	12,324	4,108	4,108	4,108	12,324	24,648

	APR	MAY	JUNE	QTR 3	YTD	JUL	AUG	SEPT	QTR 4	YTD
Cost	12,068	12,068	12,068	36,204	108,612	12,067	12,067	12,067	36,201	144,813
Match	1,569	1,568	1,568	4,705	14,119	1,569	1,569	1,569	4,707	18,826
Income	400	400	450	1,250	3,750	450	400	400	1,250	5,000
Unduplicated Clients	6	6	6	18	54	6	6	6	18	72
Units	33	33	33	99	301	33	33	33	99	400
Other Resources	4,108	4,108	4,108	12,324	36,972	4,107	4,107	4,107	12,321	49,293

AREA AGENCY ON AGING REGION IIIC PROJECTED MONTHLY EXPENDITURES

AGENCY: Redacted

SERVICE: Congregate Meals 10/01/2022 - 09/30/2023

	OCT	NOV	DEC	QTR 1	YTD	JAN	FEB	MAR	QTR 2	YTD
Cost	4,044	4,044	4,045	12,133	12,133	4,044	4,045	4,045	12,134	24,267
Match	526	526	526	1,578	1,578	526	526	526	1,578	3,156
Income	250	250	250	750	750	250	250	250	750	1,500
Unduplicated Clients	30	20	100	150	150	5	5	5	15	165
Units	18	18	19	55	55	19	18	18	55	110
Other Resources	1,242	1,242	1,242	3,726	3,726	1,242	1,242	1,241	3,725	7,451

	APR	MAY	JUNE	QTR 3	YTD	JUL	AUG	SEPT	QTR 4	YTD
Cost	4,044	4,044	4,045	12,133	36,400	4,044	4,044	4,045	12,133	48,533
Match	526	526	526	1,578	4,734	525	525	525	1,575	6,309
Income	250	250	250	750	2,250	250	250	250	750	3,000
Unduplicated Clients	5	10	10	25	190	5	5	-	10	200
Units	18	18	18	54	164	18	18	18	54	218
Other Resources	1,241	1,242	1,242	3,725	11,176	1,242	1,242	1,241	3,725	14,901

CONGREGATE NUTRITION BUDGET SUMMARY

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

Pg. 1 of 5

FUNCTION/ CATEGORY:	Raw Food	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
1. Salary	0	7,300	5,800	3,600	0	0	0	0	16,700
2. Fringe Benefits	0	5,700	300	600	0	0	0	0	6,600
3. Equipment	0	0	0	0	0	0	0	0	0
4. Raw Food	7,999	0	0	0	0	0	0	0	7,999
5. Utilities	0	750	1,000	5,709	0	0	0	0	7,459
6. Supplies	0	100	500	0	0	200	0	0	800
7. Travel	0	60	0	0	0	0	0	0	60
8. Communications	0	600	0	200	0	0	0	0	800
9. Contractual Services	0	0	13,300	0	0	0	0	0	13,300
10. Other	0	0	0	0	0	0	0	4,124	4,124
11. Total Expenditures	7,999	14,510	20,900	10,109	0	200	0	4,124	57,842
12.. Number of Meals									4,200
13.. Unit Cost									\$13.77

14. Federal Share								39,408	39,408
15. State Share								1,125	1,125
16. Program Income								3,000	3,000
17. USDA Cash								8,000	8,000
18. Local Match **								6,309	6,309
19. Total Revenue	0	0	0	0	0	0	0	57,842	57,842

** Local Match Rate: 13.0%

Certification: I certify that I am authorized to sign on behalf of this Agency. The budget amounts represent necessary and proper costs for implementing the program. Adequate documentation and records will be maintained to support all program expenditures.

Signature Redacted

Title Finance Director Date: 7-29-22

CONGREGATE NUTRITION POSITION SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

SALARIES AND WAGES: POSITION:	FTE	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
Program Coordinator	0.18	6,500							6,500
Assistant Director	0.01	800		200					1,000
Food Preparer/Delivery	0.17		1,100	2,200					3,300
Food Preparer	0.17		4,700						4,700
Volunteers Dining Sites - In-l	0.17			1,200					1,200
									0
									0
									0
									0
									0
									0
									0
Total Salaries and Wages	0.70	7,300	5,800	3,600	0	0		0	16,700

FRINGE BENEFITS									
COMPOSITE RATE :		0	0	0	0	0		0	0
Taxes		1,500	150	250					1,900
Health Insurance		3,700							3,700
Retirement		500	150	50					700
Volunteers Dining Sites - Taxes/Retirement - In-kind				300					300
									0
Total Fringe Benefits		5,700	300	600	0	0		0	6,600

TRAVEL									
RATE PER MILE: .625									0
Drivers HDM	Miles:								0
Other Mileage	Miles: 96	60							60
Conferences									0
									0
									0
Total Travel		60	0	0	0	0		0	60

CONGREGATE NUTRITION SUPPORTING DETAIL SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

Pg. 3 of 5

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
COMMUNICATIONS									
Advertising		275							275
Telephone		275							275
Cell		50		200					250
									0
									0
Total Communications	0	600	0	200	0	0	0	0	800

CONTRACTUAL SERVICES									
Voucher Program			13,300						13,300
									0
									0
									0
Total Consultants	0	0	13,300	0	0	0	0	0	13,300

OTHER COSTS									
Indirect Cost								4,124	4,124
									0
									0
									0
									0
									0
									0
									0
									0
									0
Total Other	0	0	0	0	0	0	0	4,124	4,124

CONGREGATE NUTRITION SUPPORTING DETAIL SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

Pg. 4 of 5

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
CAPITAL/EQUIPMENT									0
									0
									0
									0
Total Capital/Equipment	0	0	0	0	0	0	0	0	0

RAW FOOD	7,999								7,999
									0
									0
									0
									0
Total Raw Food	7,999	0	0	0	0	0	0	0	7,999

UTILITIES/RENT/SPACE									
Rent		750		900					1,650
Rental Space Donated - In-kind				4,809					4,809
Kitchen Utilities & maintenance			1,000						1,000
									0
									0
									0
Total Space/Rent		750	1,000	5,709	0	0	0	0	7,459

SUPPLIES									
Office/Computer Supplies		100							100
Program Supplies						200			200
Non-Food Costs			500						500
									0
									0
Total Supplies & Materials		100	500	0	0	200	0	0	800

HDM NUTRITION BUDGET SUMMARY

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

Page 1 of 5

FUNCTION/ CATEGOR	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM	Other Resources	Grand Total
1. Salary		34,636	19,029	17,515				71,180	18,332	89,512
2. Fringe Benefits		15,621	4,500	3,582				23,703	2,517	26,220
3. Equipment								0		0
4. Raw Food	36,000							36,000	16,338	52,338
5. Utilities		3,450	4,000	1,500				8,950		8,950
6. Supplies		300	1,700					2,000	1,661	3,661
7. Travel		565		11,250				11,815	6,500	18,315
8. Communications		2,500		500				3,000		3,000
9. Contratual Services								0		0
10. Other							11,991	11,991	3,945	15,936
11. Total Expenditures	36,000	57,072	29,229	34,347	0	0	11,991	168,639	49,293	217,932
12. Number of Meals								13,500	3,946	17,446
13. Unit Cost								\$12.49	\$12.49	\$12.49

14. Federal Share								45,275		45,275
15. State Share								56,056		56,056
16. Program Income								5,000		5,000
17. USDA Cash								43,482		43,482
18. Local Match **								18,826		18,826
18.5 Other Non-match resources								0	49,293	49,293
19. Total Revenue	0	0	0	0	0	0	0	168,639	49,293	217,932

** Local Match Rate: 13.0%

Certification: I certify that I am authorized to sign on behalf of this Agency. The budget amounts represent necessary and proper costs for implementing this program. Adequate documentation and records will be maintained to support all program expenditures.

Signature Redacted

Title Finance Director Date: 7.29.22

HDM NUTRITION POSITION SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

SALARIES AND WAGES: POSITION:	FTE	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assess- ment	Other	Total HDM	Other Resources	Grand Total
Program Coordinator	0.75	32,136						32,136	4,174	36,310
Assistant Director	0.05	2,500						2,500	8,615	11,115
Food Preparer/Delivery	0.08			2,235				2,235	3,500	5,735
Food Preparer	0.70		16,224					16,224		16,224
Kitchen Manager	0.04		2,080					2,080	2,043	4,123
Assistant Kitchen Manager	0.01		725					725		725
Volunteer Drivers - Inkind	0.50			15,280				15,280		15,280
								0		0
								0		0
								0		0
								0		0
								0		0
Total Salaries and Wages:	2.13	34,636	19,029	17,515	0	0	0	71,180	18,332	89,512

FRINGE BENEFITS										
COMPOSITE RATE	0.0%	0	0	0	0	0	0	0	0	0
Payroll Taxes		2,130	3,200					5,330	1,200	6,530
Health Insurance		11,991	900					12,891	997	13,888
Retirement		1,500	400					1,900	320	2,220
Volunteer Drivers - Inkind Taxes/Retirement				3,582				3,582		3,582
								0		0
Total Fringe Benefits		15,621	4,500	3,582	0	0	0	23,703	2,517	26,220

TRAVEL										
RATE PER MILE:	.6									
Drivers HDM	Miles: 18,000			11,250				11,250	6,500	17,750
Other Mileage	Miles: 904	565						565		565
Conferences								0		0
								0		0
								0		0
Total Travel		565	0	11,250	0	0	0	11,815	6,500	18,315

HDM SUPPORTING DETAIL SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM	Other Resources	Grand Total
CAPITAL/EQUIPMENT								0		0
								0		0
								0		0
								0		0
								0		0
Total Capital/Equipment	0	0	0	0	0	0	0	0	0	0

RAW FOOD										
Food Cost	36,000							36,000	16,338	52,338
								0		0
								0		0
								0		0
Total Raw Food	36,000	0	0	0	0	0	0	36,000	16,338	52,338

UTILITIES/RENT/SPACE										
Rent		3,150		1,500				4,650		4,650
Misc. Building costs		300						300		300
Kitchen Utilities & maintenance			4,000					4,000		4,000
								0		0
								0		0
								0		0
Total Space/Rent		3,450	4,000	1,500	0	0	0	8,950	0	8,950

SUPPLIES										
Office and Misc Supplies		300						300		300
Non-food kitchen supplies			1,700					1,700	1,661	3,361
								0		0
								0		0
								0		0
Total Supplies & Materials		300	1,700	0	0	0	0	2,000	1,661	3,661

HDM SUPPORTING DETAIL SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM		Grand Total
COMMUNICATIONS								0		0
Advertising		250						250		250
Postage		750						750		750
Telephone		1,000						1,000		1,000
Cell phone costs		500		500				1,000		1,000
								0		0
Total Communications	0	2,500	0	500	0	0	0	3,000	0	3,000

CONTRACTUAL SERVICES								0		0
								0		0
								0		0
								0		0
Total Consultants	0	0	0	0	0	0	0	0	0	0

OTHER COSTS								0		0
Indirect Cost							11,991	11,991	3,945	15,936
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
Total Other	0	0	0	0	0	0	11,991	11,991	3,945	15,936

HDM SUPPORTING DETAIL SCHEDULE

Agency Name: Redacted

Budget Period: 10/1/2022 to 9/30/2023

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM	Other Resources	Grand Total
CASH RESOURCES										
Program Income	1,500	2,200	200	500	200		400	5,000		5,000
								0		0
								0		0
								0		0
								0		0
Total Cash	1,500	2,200	200	500	200	0	400	5,000	0	5,000

0										
NON-CASH RESOURCES										
Volunteer Drivers				18,862				18,862		18,862
								0		0
								0		0
								0		0
Total In-Kind	0	0	0	18,862	0	0	0	18,862	0	18,862

MEALS COUNTS BY LOCATION										
Home Delivered Meals								13,500	3,946	
SUBTOTAL - HOME DELIVERED MEALS								13,500	3,946	17,446
Total Meals								13,500	3,946	17,446

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: 2CONG
(code if competitive bid)
PROGRAM: Congregate Meals

DATE OF REVIEW: 8/12/22

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
Food production bid out to larger company, then transition back to bidder
Planning for costs associated to re-establish own kitchen

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:

4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

Congregate Agency
X None ** 1-5 years 5-9 years 10+ years

** Formerly operated a restaurant program as a licensed food service operator

- B. Other Local Programs & Collaborative Efforts: (LIST)
Multiple! In home and community-based programs
- C. Other Funds to Support the Program(s)? YES NO
Donations
Senior millage \$12,000
- D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Bureau standards
- E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe: Page 2
Establish a food council, feedback from participants #1

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

- A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 other provider
Grant Funds Requested	\$40,532	\$40,240
Total Unit Rate	12.72	12.43
Grant Unit Rate	9.96	12.43
Number of Units	4071	3,900
Program Income	6,000	3,000
Unduplicated Clients Served	42	200

Notes:
Utilize own community center for program, high traffic place!

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

COMMUNITY SERVICES

2CONG recognizes and upholds the ACLS Bureau's Operating Standards for Service Providers and the General Requirements for Community Service Programs.

Congregate Meals

The Congregate Meals service entails providing a nutritious meal to older persons in a congregate setting. The Congregate Meal program is aimed at serving people aged 60 or older with an emphasis on those with the greatest need. 2CONG would also provide meals for those listed as eligible in the ACLS Bureau's operating standards. The 2CONG Congregate Meal program will be held in an accessible facility that has been inspected by the fire marshal and is in compliance with the Michigan Food Code. Congregate meals will be served five days per week with at least ten participants in attendance. Appropriate preparation and training will take place including, but not limited to, fire drills and food safety training; and emergency procedures for weather and medical events. A Program Council will be established for the purpose of providing feedback and suggestions to 2CONG staff.

2CONG has not provided congregate meals before, but has operated lunch programs in the past and has been a congregate meal site in the past. Based on this experience, as well as knowledge gathered from other successful senior meal providers in Michigan, 2CONG proposes to open a five-day-per-week congregate meal site at the Burnside Center. The Burnside Center would be ideal as a place for this service which focuses on the social benefits as well as the nutrition benefits of congregate dining. Burnside has many social and educational programs happening every day. This would be a natural fit in the daily schedule. Burnside patrons have been requesting this type of service be available for years now.

2CONG will employ a Food Service Director to oversee the entire program. Volunteers would be used to assist the Food Service Director and other program staff in serving food, preparing drinks, cleaning tables, assisting patrons, and cleaning up. The Food Service Director would ensure that proper documentation forms were completed, reservations were made for future meals, and a private opportunity for donations was maintained at each meal time. Meals provided through the contract will be made according to menus approved by the AAA dietician.

2CONG already owns CAREeVantage software as well as MySeniorCenter software, both of which are designed to assist staff in running a successful congregate meals program. The Food Service Director will coordinate the distribution of Project Fresh coupons as well.

2CONG has a commercial kitchen at the Burnside Center with all the appliances, equipment, and supplies that would be needed. 2CONG has held a food license in the past, but would need to apply for a new food license for this program and train staff to meet the Health Department code. The Food Service Director will be ServSafe® certified. Staff training will be ongoing focusing on identifying senior needs and providing appropriate referrals, food safety, social isolation, and other topics. 2CONG is prepared financially to repair or replace any equipment, structures, supplies, or appliances that are no longer functioning correctly after not being used for several years. 2CONG has an excellent congregate meal dining site available at the Burnside Center. The dining room at the Burnside Center has been a meal site in the past for a different congregate meal provider. 2CONG has an established team of volunteers and a robust history of excellent volunteer recruitment to help fill all the needs of running a congregate meal site. 2CONG also intends to continue the restaurant voucher program that the current provider has started. This will be consistent with our goal to provide person-centered planning and allow program participants to have choices. 2CONG would look to expand the availability of this program in future years with possible improvements being a larger number of vouchers available to seniors or more restaurants participating in the program.

2CONG has spent several months developing alliances with other successful senior food programs across the state including all three of our neighboring counties in Michigan. 2CONG will seek guidance and input from its staff, board members, patrons, the Program Council, and the senior public in general to determine how to best improve and expand the program. Examples of possible improvements might be opening additional congregate sites, or adding options and specialty meals to the congregate site menu.

In the current economic situation in the U.S., it is a well-known fact that staffing is hard to come by, especially in the food service industry. As 2CONG researched this plan, the advice from other program directors was to seek a contract with a third party for food production. This will

be the most reliable way to start this program quickly and with good quality. The food production provider would be required to follow all ACLS standards for nutrition programs. 2CONG hopes to transition to self-production in future years as some of our advisors have done with their own programs. 2CONG has met with large food production companies in the area including but not limited to hospitals, schools, and other home delivered meal providers in the region. 2CONG has at least two companies prepared to bid on an RFP to provide the food production for our program. Both programs have immediate capacity to make the number of meals we would need and have been successfully meeting the program objectives of a congregate program in their communities for more than ten years each.

Obviously, one the major factors that must be considered in a congregate meal program that would meet the needs of Branch County seniors is funding. The amount of funding available through this RFP is not adequate to meet the demand that exists in Branch County for senior meals. Therefore, a successful program must have additional funding allocated to meals. 2CONG has considered this need for years and looked at how 2CONG would be able to help solve this problem. 2CONG has been evaluating its existing budget to see how and if the congregate meals program might fit in. Multiple avenues have been identified by which current, existing millage money could be allocated to congregate meals. This is money that is already available in the 2CONG budget. It is not additional millage money that needs voter approval to take effect. This money is also available ongoing; it is not one-time money. Allocating these funds to congregate meals can be done without negative effects on other currently existing programs and services offered by 2CONG. 2CONG is prepared to allocate \$11,818 millage dollars annually to this program. Additional monies could be considered in the future as we see how much demand there is for the service.

One reality that must be acknowledged as we submit this proposal is that there is more than one bidder for this grant, and we will not know who is awarded the grant until the end of August 2022. That leaves approximately one month until the start date of October 1, 2022. Because we do not know yet if we will get the grant, we are unable to hire the Food Service Director, lock down the contract for food production, and other key programmatic components. It is unlikely that we would be able to tackle all of those items in one month along with the necessary

transition of client data, etc. 2CONG acknowledges this problem and proposes two solutions to get through the transition period. The first and more favorable solution to the problem would be to contract with the current congregate meals provider to have them continue their program for an agreed-upon period of time while 2CONG implements its plan and gets all the necessary items in place. We anticipate this would take three months. If the current provider is unable or unwilling to do this, we would most likely look to a commercially produced provider that can ship meals to clients and the congregate site. An example of this might be Mom's Meals. This would most certainly not be ideal; and if we had to go this route, we would work to make the transition period as brief as possible.

2CONG acknowledges that there is an established provider also bidding on this grant and our application includes a lot of items that have been researched but not implemented yet. Although there are a lot of parts that still need to be completed in our application if we are awarded the grant, we hope that our reputation as a stellar provider of services will assure you that all steps laid out in the proposal will be implemented to the fullest and according to all guidelines put out by the ACLS Bureau and by the AAA 3C. We currently run ten other grant programs in Branch County through the AAA 3C and have consistently had top scores on our annual audits. The AAA is familiar with our staff, our procedures and organization, and our commitment to services. We have consistently shown excellence in our other grants. By making this proposal, you have the assurance that we are prepared to do whatever it takes to bring this program to success as well. Congregate meals is a natural fit for the 2CONG.

2CONG requests \$40,532 of grant funding to provide congregate meals.

Outcome Measures Summary

A) Between October 1, 2022 – September 30, 2023 Branch County seniors and their caregivers and families would:

1. Have 5,000 or more units of Congregate Meals annually.
2. Have an experienced full-time employee to make assessments of individuals' needs to develop, monitor, evaluate service plans, and make referrals when necessary.

3. Have multiple trained volunteers to implement the program and meet the need of socialization with clients.
4. Personalized assistance with a person-centered approach to services.
5. Have a recognizable resource and information phone number (517-279-6565), Facebook page, newsletter, and website to secure services.

B) Branch County benefits by serving seniors, their caregivers, and their families by:

1. 2CONG promoting, encouraging, and safeguarding the rights and abilities of seniors so they may enjoy maximum health, well-being, and independence.
2. Promoting a senior-friendly community that encourages seniors, their caregivers, and their families to live in the county which contributes to the Branch County economy.

Program Costs include: Food Services Director's wages (in-part), equipment and supplies, food cost, and communications.

Congregate Meals grant funds requested as unit of service: one unit equals one meal.

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET SUMMARY

Agency: 2 CONG & 2 HDM	Project Title: <i>2022-2023 Funding Allocation - FY2023-2025 Master Contract - Budget Submission</i>	Budget Period: 10/01/2022 - 09/30/2023	Date Prepared: <p style="text-align: right;">7/29/2022</p>
A. Service Category →	Congregate Meals	HD Meals	
B. Unit Cost	\$ 12.72	\$ 9.30	
C. Grant Unit Cost	\$ 9.96	\$ 7.86	
D.			
E. Total Funds Requested →	\$ 40,532	\$ 152,813	
F. Local Match Total (13% Required)	13%	13%	
1. Cash	\$ 5,269	\$ 19,866	
2. In-Kind			
G. Program Income	\$ 6,000	\$ 8,000	
H. Total Project Funds	\$ 51,801	\$ 180,679	\$ -
I. Other Resources	\$ 12,000	\$ 172,301	
ANALYSIS			
Total Units Less Other Resources	4,071	19,434	-
A. Grant Total	\$ 40,532	\$ 152,813	
Number of Units:	3,186	16,437	
B. Local Match Total (13% required)			
1. Cash (%)	\$ 5,269	\$ 19,865.69	
Number of Units:	414	2,137	
2. In-Kind (%)			
Number of Units:			
C. Program Income ('i.e. Number of additional units to be provided over contracted levels.)	\$ 6,000	\$ 8,000.00	
Number of Units:	472	860	
D. Other Resources (specify)	County Millage Funds	County Millage Funds	
	\$ 11,818	\$ 172,623	
Number of Units:	929	18,567	

I certify that I am authorized to sign on behalf of the Agency. The budget amounts represent necessary and proper costs for implementing this program.

Signature

Title

Date

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET DETAIL

Agency: 2 CONG & 2 HDM	Project Title: 2022-2023 Funding Allocation for FY 2023-2025 Master Contract	Budget Period: 10/01/2022 - 09/30/2023	Date Prepared: 7/29/2022
	Service Category:	Service Category:	Service Category:
EXPENSE CATEGORY	Congregate Meals	HD Meals	
1. Salaries (specify)	FTE	0.25	0.75
	Amount	\$ 10,000	\$ 26,400
2. Fringe Benefits (%Rate)	%	7.65%	7.65%
	Amount	\$ 765	\$ 2,020
___ FICA ___ Life ___ Dental ___ Unemp. ___ Vision ___ WorkComp ___ Retirement ___ Hearing ___ Hosp. ___ Other			
3. Travel:			
<i>Staff:</i>			
Rate/mile_ 0.645_x_500_ Miles →	\$ -	\$ 323	
<i>Volunteer:</i>			
Rate/mile_ 0.645_x_40,000 Miles →	\$ -	\$ 25,800	
4. Equipment	\$ -	\$ -	
5. Raw Food	\$ -	\$ -	
6. Supplies	\$ 7,100	\$ 16,750	
7. Occupancy:			
Office Space \$ _____ per sq.foot →			
Utilities if not included in above →			
8. Communications (list)	copies, postage, etc \$ 750	copies, postage, etc. \$ 2,000	
9. Service Contracts (list)	Food Prod. Provider \$ 45,000	Food Prod. Provider \$ 280,000	
10. Training:			
11. Other (specify)*			
12. Total Cost (add sections 1-11)	\$ 63,615	\$ 353,292	
13. Total Units Projected	5000	38000	
14. Total Unit Cost (Line 12 Divided by Line 13)	\$ 12.72	\$ 9.30	

**AREA AGENCY ON AGING REGION IIIC
PROJECTED MONTHLY EXPENDITURES**

AGENCY: 2 CONG

SERVICE: Congregate Meals

	OCT	NOV	DEC	QTR 1	YTD	JAN	FEB	MAR	QTR 2	YTD
Cost	3378	3378	3378	10133	10133	3378	3378	3378	10133	20266
Match	439	439	439	1317	1317	439	439	439	1317	2635
Income	500	500	500	1500	1500	500	500	500	1500	3000
Unduplicated Clients	20	2	2	24	24	2	2	2	6	30
Units	339	339	339	1018	1018	339	339	339	1018	2036
Other Resources	985	985	985	2954.5	2954.5	985	985	985	2954.5	5909

	APR	MAY	JUNE	QTR 3	YTD	JUL	AUG	SEPT	QTR 4	YTD
Cost	3378	3378	3378	10133	30399	3378	3378	3378	10133	40532
Match	439	439	439	1317	3952	439	439	439	1317	5269
Income	500	500	500	1500	4500	500	500	500	1500	6000
Unduplicated Clients	2	2	2	6	36	2	2	2	6	42
Units	339	339	339	1018	3054	339	339	339	1018	4071
Other Resources	985	985	985	2954.5	8863.5	985	985	985	2954.5	11818

AREA AGENCY ON AGING REGION IIIC PROJECTED MONTHLY EXPENDITURES

AGENCY: 2 HDM

SERVICE: Home Delivered Meals

	OCT	NOV	DEC	QTR 1	YTD	JAN	FEB	MAR	QTR 2	YTD
Cost	12734	12734	12734	38203.25	38203.25	12734	12734	12734	38203.25	76406.5
Match	1655	1655	1655	4966	4966	1655	1655	1655	4966	9933
Income	667	667	667	2000	2000	667	667	667	2000	4000
Unduplicated Clients	120	2	2	124	124	2	2	2	6	130
Units	1619	1619	1619	4858	4858	1619	1619	1619	4858	9717
Other Resources	14385	14385	14385	43155.75	43155.75	14385	14385	14385	43155.75	86311.5

	APR	MAY	JUNE	QTR 3	YTD	JUL	AUG	SEPT	QTR 4	YTD
Cost	12734	12734	12734	38203.25	114609.75	12734	12734	12734	38203.25	152813
Match	1655	1655	1655	4966	14899	1655	1655	1655	4966	19866
Income	667	667	667	2000	6000	667	667	667	2000	8000
Unduplicated Clients	2	2	2	6	136	2	2	2	6	142
Units	1619	1619	1619	4858	14575	1619	1619	1619	4858	19434
Other Resources	14385	14385	14385	43155.75	129467.25	14385	14385	14385	43155.75	172623

CONGREGATE NUTRITION BUDGET SUMMARY

Agency Name: 2 CONG

Budget Period: 10/01/2022-09/30/2023

Pg. 1 of 5

FUNCTION/ CATEGORY:	Raw Food	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
1. Salary	0	6,500	0	2,000	0	0	0	1,500	10,000
2. Fringe Benefits	0	500	0	155	0	0	0	115	770
3. Equipment	0	0	0	0	0	0	0	0	0
4. Raw Food	0	0	0	0	0	0	0	0	0
5. Utilities	0	0	0	0	0	0	0	0	0
6. Supplies	0	1,750	2,200	3,150	0	0	0	0	7,100
7. Travel	0	0	0	0	0	0	0	0	0
8. Communications	0	750	0	0	0	0	0	0	750
9. Contractual Services	0	0	45,000	0	0	0	0	0	45,000
10. Other	0	0	0	0	0	0	0	0	0
11. Total Expenditures	0	9,500	47,200	5,305	0	0	0	1,615	63,620
12.. Number of Meals									5,000
13.. Unit Cost									\$12.72

14. Federal Share			39,408						39,408
15. State Share		1,125							1,125
16. Program Income		221		5,305				474	6,000
17. USDA Cash									0
18. Local Match **		8,154	7,792					1,141	17,087
19. Total Revenue	0	9,500	47,200	5,305	0	0	0	1,615	63,620

** Local Match Rate: 13.0%

Certification: I certify that I am authorized to sign on behalf of this Agency. The budget amounts represent necessary and proper costs for implementing the program. Adequate documentation and records will be maintained to support all program expenditures.

Signature _____ Title _____ Date: _____

CONGREGATE NUTRITION POSITION SCHEDULE

Agency Name: 2 CONG

Budget Period: 10/01/2022-09/30/2023

Pg. 2 of 5

SALARIES AND WAGES: POSITION:	FTE	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
Food Service Director	0.25	6,500		2,000				1,500	10,000
									0
									0
									0
									0
									0
									0
									0
									0
									0
									0
									0
Total Salaries and Wages	0.25	6,500	0	2,000	0	0		1,500	10,000

FRINGE BENEFITS									
COMPOSITE RATE	7.65%	500	0	155	0	0		115	770
Total Fringe Benefits		500	0	155	0	0		115	770

TRAVEL									
RATE PER MILE:									0
Drivers HDM Miles:									0
Other Mileage Miles:									0
Conferences									0
									0
									0
Total Travel		0	0	0	0	0		0	0

CONGREGATE NUTRITION SUPPORTING DETAIL SCHEDULE

Agency Name: 2 CONG

Budget Period: 10/01/2022-09/30/2023

Pg. 4 of 5

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Equipment	Supplies	Catered Meals	Other	Grand Total
CAPITAL/EQUIPMENT									0
									0
									0
									0
Total Capital/Equipment	0	0	0	0	0	0	0	0	0

RAW FOOD									
									0
									0
									0
									0
Total Raw Food	0	0	0	0	0	0	0	0	0

UTILITIES/RENT/SPACE									
									0
									0
									0
									0
									0
									0
Total Space/Rent	0	0	0	0	0	0	0	0	0

SUPPLIES									
Consumable supplies				2,200					2,200
Office supplies	250								250
Program supplies	1,500		750						2,250
Maintenance supplies		1,700	200						1,900
Small equipment		500							500
Total Supplies & Materials	1,750	2,200	3,150	0	0	0	0	0	7,100

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: 2HDM
(code if competitive bid)
PROGRAM: Home Delivered Meals

DATE OF REVIEW: 8/12/22

REVIEWED BY: LAS /NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
5 meals/week, hot or frozen, Liquid supplements available
Seek qualified staff, food management certification,

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST: page 3

Eliminate wait list by end of first fiscal year, transition w/ current provider
work toward more meals, weekends
Bid out meal production to a larger company – goal to bring back in house

4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

HDM Agency
X None 1-5 years 5-9 years X 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
Multiple! In home and community-based services

- C. Other Funds to Support the Program(s)? YES NO
 Donation request
 Senior millage \$172,000 HDM

- D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Bureau standards

- E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

- A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 other bidder
Grant Funds Requested	152,813	150,502
Total Unit Rate	9.30	10.95
Grant Unit Rate	7.86	9.51
Number of Units	19,434	15,830
Program Income	8,000	3,300
Unduplicated Clients Served	142	72

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

IN-HOME SERVICES

2HDM recognizes and upholds the ACLS Bureau's Operating Standards for Service Providers and the General Requirements for In-Home Service Programs.

Home Delivered Meals

Home Delivered Meals is a program constituted by the provision of a nutritious meal to home-bound older persons. 2HDM has not operated this program before, but has spent months preparing a plan to do so. This program will have written guidelines in alignment with the ACLS Bureau's operating standards including but not limited to: serving those most in need, participants must be 60 years of age or older and be homebound. They must have dietary restrictions that can be met by the program and be able to feed themselves. They must have a need for the meal which could be a lack of ability or incentive to prepare their own meals, an absent or insufficient informal support system to prepare meals for them, and they must be able to be home when the meals are delivered and to communicate with 2HDM staff when conflicts arise. There are some exceptions to the eligibility criteria that will be allowed according to the ACLS Bureau's guidelines.

It is a well-known fact in Branch County that there is higher demand for meals than there are available services. It has been this way for many years. The 2HDM's mission is to pay attention to the needs of Branch County seniors and provide services, programs, and activities to meet those needs. That need was reaffirmed again in the Community Needs Assessment that the Area Agency on Aging 3C completed as a part of this RFP process. Home Delivered Meals was the number one need identified by both seniors and service providers. It was also identified in the Area Agency on Aging 3C's Annual Implementation Plan that the number of older adult residents in Branch County is growing. So we can expect that demand for services, including Home Delivered Meals, will also grow. 2HDM has been considering ways to address this need and what the 2HDM's role in that solution would be for several years now. Over the last nine months, 2HDM has been actively researching and devoting a large amount of time to finding a solution to this problem.

Meals are a basic need for all people. Seniors can be especially vulnerable to a need for meals because of problems with health, mobility, transportation, finances, etc. When you are in need of help getting meals, you need that service right away. In Branch County, there has been a waiting list for this service for many years now. 2HDM has met with successful service providers from around the state. We have developed alliances with organizations that can support and advise the development of a new program. 2HDM has visited kitchens, met with staff, and collected document examples that will advise a successful program including but not limited to contract examples, RFPs, job descriptions, policies, procedures, advertising pieces, etc.

2HDM has also met with current Burnside patrons, staff, and the board of directors to discuss options and concepts and focus in on what is most needed and what is most likely to succeed. Through this work, the staff and board of 2HDM have determined that we are ready, willing, and capable of launching a successful Home Delivered Meals (HDM) program that will meet the demand for meals in the county. This will become another major service to the county that seniors can count on from 2HDM for years to come.

2HDM proposes to start this new program with the same level of service that the current provider is offering to provide consistency in the transition period. 2HDM would begin by offering five meals per week, either hot or frozen. Liquid nutritional supplements would also be available as an option. 2HDM would utilize volunteer drivers with mileage reimbursement available. 2HDM hopes the current drivers will be interested in continuing their important work and will drive for 2HDM. 2HDM has a robust history of excellent volunteer recruitment experience to help fill any spots for home delivered meal drivers. 2HDM will hire a Food Services Director who would oversee the entire program. The In-Home Services Director and In-Home Services Assistant already have experience completing intakes and reassessments and in using the CAREeVantage software, so they would start out as a part of the program assessing HDM clients as well. They will provide ongoing support to the Food Services Director. As with our other in-home services programs, we would intend to do the vast majority of assessments and reassessments in-person and would attempt to collect all of the required information.

Having the home delivered meals program and the in-home services program under the same company umbrella will bring an efficiency of services that benefits the entire community. Many seniors could be serviced by one assessment and then one reassessment every six months instead of the current procedure where the same clients are often being assessed by two companies. Person-centered planning would be utilized, including allowing participants to choose to receive the entire meal or to receive only part. The 2HDM will utilize a Home Visit Safety policy to ensure that all staff members and volunteers that enter a home are not subjected to unsafe or threatening environments and individuals. Nutrition education would be provided as a part of this service. The Food Service Director would coordinate the distribution of Project Fresh coupons each year as well. Another very important component of this program would be the wellness check and opportunity for socialization that is provided by the HDM driver.

2HDM will obtain the necessary license through the Health Department for operating this food program. The Food Service Director will be ServSafe® certified. Staff training will be ongoing, focusing on identifying senior needs and providing appropriate referrals, food safety, social isolation, and other topics. Contribution procedures for home delivered meals will be addressed at the time of the initial assessment. The Food Services Director will review the policies and services of the Branch County Commission on Aging and inform the client of the suggested donation procedure. Each month, a statement would be sent indicating the number of meals the client received, a suggested donation rate for the service, and the dollar amount that was donated the previous month. This letter is not a bill. Home delivered meal donations can be mailed to 2HDM where a receipt is made and the funds are attributed to the client's account.

The first goal of the program will be to increase participants in the program and eliminate the waiting list by the end of the first year of the grant. Future goals would be set based on feedback from staff, board members, and senior service providers; and most importantly, the clients. Future goals might include offering a second meal per day, offering weekend meals, or other items.

In the current economic situation in the U.S., it is a well-known fact that staffing is hard to come by, especially in the food service industry. As 2HDM researched this plan, the advice from other

program directors was to seek a contract with a third party for food production. This will be the most reliable way to start this program quickly and with good quality. The food production provider would be required to follow all ACLS standards for nutrition programs. 2HDM hopes to transition to self-production in future years as some of our advisors have done with their own programs. 2HDM has met with large food production companies in the area including but not limited to hospitals, schools, and other home delivered meal providers in the region. 2HDM has at least two companies prepared to bid on an RFP to provide the food production for our program. Both programs have immediate capacity to make the number of meals we would need, and have been successfully meeting the program objectives of an HDM program in their communities for more than ten years each.

Obviously, one of the major factors that must be considered in an HDM program that will meet the needs of Branch County seniors is funding. The amount of funding available through this RFP is not adequate to meet the demand that exists in Branch County for senior meals. Therefore, a successful program must have additional funding allocated to meals. 2HDM has considered this need for years and looked at how 2HDM would be able to help solve this problem. 2HDM has been evaluating its existing budget to see how and if the HDM program might fit in. Multiple avenues have been identified by which current, existing millage money could be allocated to HDM. This is money that is already available in the 2HDM budget. It is not additional millage money that needs voter approval to take effect. This money is also available ongoing; it is not one-time money. Allocating these funds to HDM can be done without negative effects on other currently existing programs and services offered by 2HDM. 2HDM is prepared to allocate \$172,623 millage dollars annually to this program. Additional monies could be considered in the future as we see how much demand there is for the service.

One reality that must be acknowledged as we submit this proposal is that there is more than one bidder for this grant, and we will not know who is awarded the grant until the end of August 2022. That leaves approximately one month until the start date of October 1, 2022. Because we do not know yet if we will get the grant, we are unable to hire the Food Service Director, lock down the contract for food production, and other key programmatic components. It is unlikely that we will be able to tackle all of those items in one month along with the necessary transition

of client data, etc. 2HDM acknowledges this problem and proposes two solutions to get through the transition period. The first and more favorable solution to the problem would be to contract with the current HDM provider to have them continue their program for an agreed-upon period of time while 2HDM implements its plan and gets all the necessary items in place. We anticipate this would take three months. If the current provider is unable or unwilling to do this, we would most likely look to a commercially produced provider that can ship meals to clients and the congregate site. An example of this might be Mom's Meals. This would most certainly not be ideal; and if we had to go this route, we would work to make the transition period as brief as possible.

2HDM acknowledges that there is an established provider also bidding on this grant and our application includes a lot of items that have been researched but not implemented yet. Although there are a lot of parts that still need to be completed in our application if we are awarded the grant, we hope that our reputation as a stellar provider of services will assure you that all steps laid out in the proposal will be implemented to the fullest and according to all guidelines put out by the ACLS Bureau and by the AAA 3C. We currently run ten other grant programs in Branch County through the AAA 3C and have consistently had top scores on our annual audits. The AAA is familiar with our staff, our procedures and organization, and our commitment to services. We have consistently shown excellence in our other grants. By making this proposal you have the assurance that we are prepared to do whatever it takes to bring this program to success as well. No senior should be waiting for home delivered meals.

2HDM requests \$152,813 of grant funding to provide Home Delivered Meals.

Outcome Measures Summary

A) Between October 1, 2022 – September 30, 2023 Branch County seniors and their caregivers and families will:

1. Have 38,000 or more units of Home Delivered Meals annually.
2. Have an experienced full-time employee to make assessments of individuals' needs to develop, monitor, evaluate service plans, and make referrals when necessary.
3. Have a trained part-time employee to complete reassessments.

4. Have multiple trained home delivered meals drivers who provide a daily wellness check.
5. Have multiple trained home delivered meals drivers who make daily reports to the food services director, and at any other times as necessary.
6. Personalized assistance with a person-centered approach to services.
7. Have a recognizable resource and information phone number (517-279-6565), Facebook page, newsletter, and website to secure services.

B) Branch County benefits by serving seniors, their caregivers, and their families by:

1. 2HDM promoting, encouraging, and safeguarding the rights and abilities of seniors so they may enjoy maximum health, well-being, and independence.
2. Promoting a senior-friendly community that encourages seniors, their caregivers, and their families to live in the county which contributes to the Branch County economy.

Program Costs include: Food Services Director's wages (in-part), equipment and supplies, food cost, mileage, and communications.

Home Delivered Meals grant funds requested as unit of service: one unit equals one meal.

HDM NUTRITION BUDGET SUMMARY

Agency Name: 2 HDM

Budget Pe 10/01/2022 - 09/30/2023

Page 1 of 5

FUNCTION/ CATEGOR	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM		Grand Total
1. Salary		18,500		5,300			2,599	26,399		26,399
2. Fringe Benefits		1,420		410			200	2,030		2,030
3. Equipment								0		0
4. Raw Food								0		0
5. Utilities								0		0
6. Supplies				16,750				16,750		16,750
7. Travel		323		25,800				26,123		26,123
8. Communications		2,000						2,000		2,000
9. Contratual Services			280,000					280,000		280,000
10. Other								0		0
11. Total Expenditures	0	22,243	280,000	48,260	0	0	2,799	353,302		353,302
12. Number of Meals								38,000		38,000
13. Unit Cost								\$9.30		\$9.30

14. Federal Share			96,757					96,757		96,757
15. State Share			56,056					56,056		56,056
16. Program Income			8,000					8,000		8,000
17. USDA Cash								0		0
18. Local Match **		22,243	119,187	48,260			2,799	192,489		192,489
19. Total Revenue	0	22,243	280,000	48,260	0	0	2,799	353,302	0	353,302

** Local Match Rate: 13.0%

Certification: I certify that I am authorized to sign on behalf of this Agency. The budget amounts represent necessary and proper costs for implementing this program. Adequate documentation and records will be maintained to support all program expenditures.

Signature _____ Title _____ Date: _____

HDM NUTRITION POSITION SCHEDULE

Agency Name: 2 HDM

Budget Pe 10/01/2022 - 09/30/2023

SALARIES AND WAGES: POSITION:	FTE	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assess- ment	Other	Total HDM		Grand Total
Food Service Director	0.75	18,500		5,300			2,599	26,400		26,400
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
Total Salaries and Wages	0.75	18,500	0	5,300	0	0	2,599	26,400	0	26,400

FRINGE BENEFITS										
COMPOSITE RATE	7.7%	1,420	0	410	0	0	200	2,030	0	2,030
								0		0
								0		0
								0		0
								0		0
								0		0
Total Fringe Benefits		1,420	0	410	0	0	200	2,030	0	2,030

TRAVEL										
RATE PER MILE:	0.65									
Drivers HDM 40,000 Mil				25,800				25,800		25,800
Other Mileage Miles:500		323						323		323
Conferences								0		0
								0		0
								0		0
Total Travel		323	0	25,800	0	0	0	26,123	0	26,123

HDM SUPPORTING DETAIL SCHEDULE

Agency Name: 2 HDM

Budget Pe 10/01/2022 - 09/30/2023

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM		Grand Total
CAPITAL/EQUIPMENT								0		0
								0		0
								0		0
								0		0
								0		0
Total Capital/Equipment	0	0	0	0	0	0	0	0	0	0

RAW FOOD								0		0
								0		0
								0		0
								0		0
								0		0
Total Raw Food	0	0	0	0	0	0	0	0	0	0

UTILITIES/RENT/SPACE								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
								0		0
Total Space/Rent	0	0	0	0	0	0	0	0	0	0

SUPPLIES								0		0
Consumable supplies				13,500				13,500		13,500
Office supplies				1,000				1,000		1,000
Program supplies				1,500				1,500		1,500
Small equipment				750				750		750
								0		0
Total Supplies & Materials	0	0	16,750	0	0	0	0	16,750	0	16,750

HDM SUPPORTING DETAIL SCHEDULE

Agency Name: 2 HDM

Budget Pe 10/01/2022 - 09/30/2023

FUNCTION/CATEGORY	Raw Food	Program Management	Meal Costs	Meal Delivery	Supplies and Equipment	HDM Assessment	Other	Total HDM		Grand Total
CASH RESOURCES										
Grant funds requested			107,000	45,813				152,813		152,813
Local match		13,700	920	2,447			2,799	19,866		19,866
Program income			8,000					8,000		8,000
Other resources		8,543	164,080					172,623		172,623
								0		0
Total Cash	0	22,243	280,000	48,260	0	0	2,799	353,302	0	353,302

0

NON-CASH RESOURCES										
								0		0
								0		0
								0		0
								0		0
Total In-Kind	0	0	0	0	0	0	0	0	0	0

MEALS COUNTS BY LOCATION										
								38,000		
SUBTOTAL - HOME DELIVERED MEALS								38,000		38,000
Total Meals								38,000	0	38,000

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: 1Trans
(code if competitive bid)
PROGRAM: Transportation

DATE OF REVIEW: 8/11/22

REVIEWED BY: LS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
Cooperation w/ Branch County VA, out of county, out of state, Caregiver can ride with

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
See page 3 of narrative

4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
 CC&S, in home programs, activities, senior center, etc

C. Other Funds to Support the Program(s)? YES NO
 millage

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Greatest in need, coordinate w/ other providers, DHS

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22
Grant Funds Requested	\$3500 (500 is POS)	\$4,000
Total Unit Rate	39.69	34.63
Grant Unit Rate	12.50	10.69
Number of Units	240	582
Program Income	1100	1700
Unduplicated Clients Served	123	123

Notes:
 \$500 Purchase of Service (vol. reimburse, VA agreement)
 \$3000 Unit rate reimbursement (scheduled rides/trips)

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET DETAIL

Agency: 1TRANS	Project Title: 2022-2023 Funding Allocation for FY 2023-2025 Master Contract	Budget Period: 10/01/2022 - 09/30/2023	Date Prepared: 7/29/2022
	Service Category:	Service Category:	Service Category:
EXPENSE CATEGORY		Transportation	Transportation POS
1. Salaries (specify)	FTE	\$ 0.20	0.02
	Amount	\$ 6,500	\$ 705
2. Fringe Benefits (%Rate)	%	7.65%	7.65%
	Amount	\$ 497	\$ 54
___ FICA ___ Life ___ Dental ___ Unemp. ___ Vision ___ WorkComp ___ Retirement ___ Hearing ___ Hosp. ___ Other			
3. Travel:			
Staff:			
Rate/mile _____ x _____ Miles →			
Volunteer:			
Rate/mile 0.645 x 1,600 Miles →			\$ 1,032
4. Equipment			
5. Raw Food			
6. Supplies		\$ 2,379	
7. Occupancy:			
Office Space \$ _____ per sq.foot →			
Utilities if not included in above →			
8. Communications (list)		\$ 150	
9. Service Contracts (list)			
10. Training:			
11. Other (specify)*		\$ -	\$ 100
12. Total Cost (add sections 1-11)		\$ 9,526	\$ 1,891
13. Total Units Projected		240	20
14. Total Unit Cost (Line 12 Divided by Line 13)		\$ 39.69	POS

ACCESS SERVICES

1TRANS recognizes and upholds the ACLS Bureau's Operating Standards for Service Providers and the General Requirements for Access Service Programs.

Transportation

The ACLS Bureau's operating standards for a transportation program is defined as a centrally organized service for transportation of older people to and from community facilities in order to receive support services, reduce isolation, and otherwise promote independent living.

1TRANS is proposing two requests for transportation grant funding. The first is Assisted Transportation and Escort service. The second program is subcontracting for Volunteer Reimbursement.

Transportation Funding Request #1: Assisted Transportation and Escort Service

Assisted Transportation and Escort is currently provided by 1TRANS through its Medical Transportation Van Service as a Demand/Response system. The van transportation program is a valued program for the older adults of Branch County traveling to medical appointments. The van picks up an older adult at home, transports the older adult to a medical appointment, and then returns the older adult back home. A donation may be offered to the 1TRANS, but is not required. The van travels outside the local area as far away as Fort Wayne, Battle Creek, Ann Arbor, Kalamazoo, Lansing, and other locations. This service allows seniors or their caregivers the peace of mind of not having to navigate in busy urban areas or drive when they are unable.

Currently, two vans are used in the program. 1TRANS owns a 2016 Dodge Grand Caravan, which is the primary vehicle used in this program. 1TRANS also holds a cooperative agreement with the Branch County Veterans Affairs department to use one of its Dodge Grand Caravans with a wheelchair ramp for clients who require this accommodation. When this van is used, mileage reimbursement is provided to the VA.

1TRANS's transportation program encourages, but does not require, a donation. A suggested donation is discussed when scheduling the ride. Each suggested donation is based on the starting

point from Coldwater. The van program suggested donation schedule is included as an attachment. Van riders receive a monthly statement in the mail at the end of each month that they utilize the service as an additional opportunity to make a donation. If they have already donated, that is itemized on the statement.

Volunteer drivers are coordinated, scheduled, interviewed, and trained through the ITRANS staff support position, including special training on the use of the handicap safety belts and wheelchair ramp system as needed.

The program has a global positioning system (GPS) that assists the van drivers to navigate to the destination in the safest and shortest route possible. The staff assistant also prepares detailed maps for the drivers. The van is always stocked with a wheelchair, a step for help getting into the van, a blanket, a first aid kit, a handicap parking tag, and a roadside emergency kit.

Person-centered planning is addressed in the Escorted Transportation program by inquiring as to the senior's needs, and those needs such as date and time of transportation are fulfilled based on the individual's requests, if at all possible. If a client prefers to have a specific ITRANS driver, then ITRANS attempts to honor his or her wishes. If there are no vans available and an individual's destination is the same and relatively at the same time as a previously scheduled trip, then both requesting participants are asked if they give their permission to share the van to the destination and each sign a confidentiality agreement. If seniors request a caregiver to ride with them, a caregiver is allowed to accompany the client. Drivers ask participants if they would like the driver to accompany them into, and wait in, the medical office or if they prefer the driver wait outside the office. ITRANS has very accommodating volunteer drivers who are sensitive to seniors' requests within the van transportation policy.

Transportation in Branch County is provided to residents of all ages by the Branch Area Transit Authority (BATA). The ITRANS medical transportation program transports those aged 60 years or older whom the BATA system cannot meet the needs of. This may be, for instance, a senior who needs to be picked up at the door and transported immediately to their medical destination. BATA generally makes several stops or pick-ups before arriving at a rider's

destination. ITRANS's transportation program also provides assistance to the rider to get into and out of the vehicle—another feature that BATA does not offer. The ITRANS program travels outside of Branch County to medical appointments in many of the surrounding counties in southern Michigan and northern Indiana which BATA does not provide rides to. ITRANS encourages seniors to utilize BATA whenever they are able to; however, the ITRANS program is essential to meet the needs of the frailest seniors—for whom BATA's program is not designed.

ITRANS requests \$3,000 grant funding to provide Assisted Transportation and Escort Services.

Outcome Measures Summary

A) Between October 1, 2022 and September 30, 2023, Branch County seniors, and their caregivers and families will have:

1. 240 or more medical van trips per year.
2. Medical transportation that promotes continuity of care.
3. Safe and timely medical transportation by trained drivers.
4. Reduced caregiver and recipient stress getting to medical appointments.
5. Personalized assistance with a person-centered approach to services.
6. Medical transportation to locations outside of Branch County (i.e. Lansing, Ann Arbor, Kalamazoo, Battle Creek, Fort Wayne, and others).
7. Opportunity to stop and wait for prescriptions to be filled.
8. Have a recognizable resource and information phone number (517-279-XXXX), Facebook page, newsletter, and website to secure services.

B) Branch County benefits by serving seniors, their caregivers, and their families by:

1. ITRANS promoting, encouraging, and safeguarding the rights and abilities of seniors so they may enjoy maximum health, well-being, and independence.
2. Promoting a senior-friendly community that encourages seniors, their caregivers, and their families to live in the county which contributes to the Branch County economy.

Operational costs of the ITRANS Escorted Van Transportation Service program are gasoline, van accident and liability insurance, paid coordinator's wages (in part), advertising of the program, and vehicle licensing.

Transportation Grant Funds Requested as Unit of Service: equals one, one-way trip per person.

Transportation Funding Request #2: Assisted Escort Transportation –Volunteer Reimbursement and Wheelchair Ramp Vehicle Agreement

ITRANS is requesting additional transportation funding for subcontracting in two ways. The first program would provide out-of-pocket expense reimbursement for volunteers who transport older people in their private vehicles. The second program involves an agreement with the Branch County Veterans Affairs office for use of its wheelchair ramp vehicle. The volunteer drivers would have passed a background check, a driving record check, state and national sex offender registry checks, and carry vehicle insurance. This transportation service would provide door-to-door service to medical appointments. This service would reduce isolation and connect seniors to services. This transportation service would also promote independent living which reduces long-term care costs by allowing seniors to live in their homes. This extra transportation program would allow ITRANS to serve clients when the minivan is already booked, in cases where using a personal vehicle makes more sense, or when a wheelchair ramp vehicle is required. The agreement with the VA for use of its vehicle has proven to be more cost-effective than ITRANS owning its own wheelchair ramp vehicle. This flexibility helps ITRANS offer a more person-centered service.

Person-centered planning is addressed in the Assisted Escort Transportation – Volunteer Reimbursement service the same as stated above with the Assisted Transportation and Escort Service.

ITRANS requests \$500 grant funding for subcontracting Assisted Transportation and Escort Services.

Outcome Measures Summary

A) Between October 1, 2022 and September 30, 2023, Branch County seniors, their caregivers, and their families will have:

1. Ten or more subcontracted medical appointment rides.
2. Volunteer Reimbursement will provide transportation when ITRANS's medical van is unavailable or when a smaller vehicle is more desirable for the senior transportation.
3. Access to a wheelchair ramp vehicle for those clients who require it.
4. Medical transportation promotes continuity of care.
5. Safe and timely medical transportation by trained drivers.
6. Reduced caregiver and recipient stress getting to medical appointments.
7. Personalized assistance with a person-centered approach to services.
8. Medical transportation to locations outside of Branch County (i.e. Lansing, Ann Arbor, Kalamazoo, Battle Creek, Fort Wayne, and others).
9. Opportunity to stop and wait for prescriptions to be filled.
10. Have a recognizable resource and information phone number (517-279-XXXX), Facebook page, newsletter, and website to secure services.

B) Branch County benefits by serving seniors, caregivers, and their families by:

1. ITRANS promoting, encouraging, and safeguarding the rights and abilities of seniors so they may enjoy maximum health, well-being, and independence.
2. Promoting a senior-friendly community that encourages seniors, their caregivers, and families to live in the county which contributes to the Branch County economy.

Operational costs of the ITRANS volunteer reimbursement transportation program are: vehicle upkeep and oil changes; mileage reimbursement for volunteer drivers (amount determined at the government rate); reimbursement to the VA for use of their wheelchair van; driver education in assisting individuals, safety and lift equipment use, and safe driving programs; and the paid coordinator's wages (in part).

Assisted Escorted Transportation – Volunteer Reimbursement Grant Funds Requested as Purchase of Service.

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: 2 Trans
(code if competitive bid)
PROGRAM: Transportation

DATE OF REVIEW: 08/10/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None
- 1-5 years
- 5-9 years
- 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

Collaborates with DHHS, Local Advisory Council, Commission on Aging, Nursing Homes, Senior Housing, Assisted Living Facilities.

C. Other Funds to Support the Program(s)? YES NO

50% of funding comprised of federal, state and local funds – local transit millage

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

Serves all ages, prioritizing rides to religious services, medical and nutritional trips with an emphasis on low income and/or minority individuals; caregivers can ride too

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

There is a process for positive or negative feedback and complaints.

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**
FY22 budget

	Bidder	Other Comparison FY22 budget
Grant Funds Requested	\$18,900	\$18,900
Total Unit Rate	\$4.31	\$4.31
Grant Unit Rate	\$3.66	\$3.66
Number of Units	5074	5098
Program Income	\$195	\$199
Unduplicated Clients Served	180	160

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET SUMMARY

Agency: 2TRANS	Project Title: Transportation	Budget Period: 10/01/2022-09/30/2023	Date Prepared: 7/27/2022
A. Service Category →			
B. Unit Cost	\$ 4.31	#DIV/0!	#DIV/0!
C. Grant Unit Cost	\$ 3.66	#DIV/0!	#DIV/0!
D.			
E. Total Funds Requested →	\$ 18,900		
F. Local Match Total (13% Required)			
1. Cash	\$ 2,775		
2. In-Kind			
G. Program Income	\$ 199		
H. Total Project Funds	\$ 21,874	\$ -	\$ -
I. Other Resources			
ANALYSIS			
Total Units Less Other Resources	5,075	-	-
A. Grant Total	\$ 18,900		
Number of Units:	4,385		
B. Local Match Total (13% required)			
1. Cash (%)	\$ 2,775.00		
Number of Units:	644		
2. In-Kind (%)			
Number of Units:			
C. Program Income ('i.e. Number of additional units to be provided over contracted levels.)	\$ 199.00		
Number of Units:	46		
D. Other Resources (specify)			
Number of Units:			

I certify that I am authorized to sign on behalf of the Agency. The budget amounts represent necessary and proper costs for implementing this program.

	Director	7/27/2022
Signature	Title	Date

AREA AGENCY ON AGING REGION IIIC UNIT COST BUDGET DETAIL

Agency: 2TRANS	Project Title: Transportation	Budget Period: 10/01/2022-09/30/2023	Date Prepared: 7/27/2022
	<i>Service Category:</i>	<i>Service Category:</i>	<i>Service Category:</i>
EXPENSE CATEGORY	Transportation		
1. Salaries (specify)	FTE		
Amount	\$ 13,092		
2. Fringe Benefits (%Rate)	%	38%	
Amount	\$ 4,975		
<input type="checkbox"/> FICA <input type="checkbox"/> Life <input type="checkbox"/> Dental <input type="checkbox"/> Unemp. <input type="checkbox"/> Vision <input type="checkbox"/> WorkComp <input type="checkbox"/> Retirement <input type="checkbox"/> Hearing <input type="checkbox"/> Hosp. <input type="checkbox"/> Other			
3. Travel:			
Staff:			
Rate/mile _____ x _____ Miles →			
Volunteer:			
Rate/mile _____ x _____ Miles →			
4. Equipment			
5. Raw Food			
6. Supplies	\$ 2,101		
7. Occupancy:			
Office Space \$ _____ per sq.foot →			
Utilities if not included in above →	\$ 247		
8. Communications (list)	\$ 211		
9. Service Contracts (list)	\$ 86		
10. Training:	\$ 268		
11. Other (specify)*	\$ 894		
12. Total Cost (add sections 1-11)	\$ 21,874	\$ -	\$ -
13. Total Units Projected	5075		
14. Total Unit Cost (Line 12 Divided by Line 13)	4.310147783	#DIV/0!	#DIV/0!

* Indirect costs may only be included if and only at the federally approved rate for your organization.

**AREA AGENCY ON AGING REGION IIIC
PROJECTED MONTHLY EXPENDITURES**

AGENCY: 2TRANS

SERVICE: Transportation

FY2022-2023

	OCT	NOV	DEC	QTR 1	YTD	JAN	FEB	MAR	QTR 2	YTD
Cost	1823	1823	1823	5469	5469	1822	1822	1823	5467	10936
Match	232	232	232	696	696	231	231	231	693	1389
Income	17	17	17	51	51	16	16	16	48	99
Unduplicated Clients	15	15	15	45	45	15	15	15	45	90
Units	423	423	423	1269	1269	422	422	423	1267	2536
Other Resources				0	0				0	0

	APR	MAY	JUNE	QTR 3	YTD	JUL	AUG	SEPT	QTR 4	YTD
Cost	1823	1823	1823	5469	16405	1823	1823	1823	5469	21874
Match	231	231	231	693	2082	231	231	231	693	2775
Income	16	16	17	49	148	17	17	17	51	199
Unduplicated Clients	15	15	15	45	135	15	15	15	45	180
Units	423	423	423	1269	3805	423	423	423	1269	5074
Other Resources				0	0				0	0

PART I

PROGRAM NARRATIVE

A. OBJECTIVES/PROGRAM PLAN

2TRANS provides demand-response, curb-to-curb service to all of Branch County. This proposed project will supply transportation to seniors in order to reduce isolation and provide for independent living. 2TRANS is continually striving to improve service. Also, we try to maintain a certain comfort level for our clients. In addition, all 2TRANS vehicles are lift equipped, so whether clients are physically challenged or not, they can ride the bus together and may be accompanied by a friend, family member, or an aide to assist them with their bus trips at no additional charge.

B. ACCESS/UTILIZATION/QUALITY CONTROL

1. 2TRANS collaborates with and obtains referrals from various human services agencies, including the following: DHHS, Local Advisory Council, Commission on Aging, Nursing Homes, Senior Housing, Assisted Living Facilities, etc. When referrals are made, we provide the information to the potential client(s). Referring agencies may assist seniors in completing the short information sheet. In most cases, the clients will set up their own trips. In other cases, it may be a caregiver that arranges transportation services for a client of 2TRANS, which in turn allows the caregiver a break. However, in certain instances, the referring agency will arrange for client transportation. In recent years, all 2TRANS bus operators participated in Elder Abuse Awareness training to assist them with recognizing the signs of elder abuse and giving them the tools and resources to get help to seniors who may be being victimized.

2. When demand exceeds resources, 2TRANS may reduce allowable rides to religious services, medical, and nutritional trips only, with emphasis on transportation for seniors who are low-income and/or minority. We are also in the process of establishing a Waiting List Policy/Procedure.
3. Due to the fact that the vast majority of clients 2TRANS serves on this grant meet the criteria of low income and/or minority, which includes black, indigenous, and people of color and LGBTQ+ communities 2TRANS may further limit the number of one-way trips a client may utilize for grant purposes each month. The set number of trips would be evaluated at the end of each quarter, in order to provide as much transportation service as possible, while maintaining budget integrity.
4. 2TRANS uses local radio, local newspapers, senior publications and the internet to promote/market/advertise the services we provide to our senior population as well as the general public. To date we have not needed translation services to communicate need for service with customers but we will implement in the future if necessary.
5. Clients may contact the 2TRANS offices with any comments of praise or concern. A senior Commission on Aging client, who is also a 2TRANS consumer, is a member of the Local Advisory Council for the 2TRANS. This provides an additional opportunity for concerns to be voiced. There is also a complaint resolution procedure in place to be followed. The above is used to continually improve our quality of service.

2TRANS continually strives to provide the best service possible in a cost efficient manner. Service and cost are evaluated on a regular basis.

All 2TRANS bus operators receive training in the proper way to assist passengers. 2TRANS also provides annual training with the focus being passenger safety and passenger assistance, as well as review of the Title VI Policy which states no one will be denied service based on race, color, or national origin.

C. ORGANIZATIONAL CAPABILITY

1. 2TRANS has been in existence since 1984 (then named "BARBS"). In these past thirty eight years, 2TRANS has provided over 3.6 million rides to citizens in Branch County. Approximately 25% of these rides (more than 900,000) have been for senior citizens.
2. 2TRANS's single program and purpose is to provide transportation to clients in Branch County. We serve all population ages. There is no one too young or too old to use the service we provide.
3. For this specific program, with the enclosed budget and number of rides, Older American's Act dollars make up approximately 50% of the funding. The remaining balance is comprised of federal, state, and local funds.

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Caregiver Education, Support and Training REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
Collab w/ Branch ISD Early Ed, Coalition Against Domestic/Sexual Violence, faith community for program site; meal and childcare provided for participants

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:

4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
 local hospice, funeral homes, hospital, community health agency, county
 mental health agency, physicians, and others

C. Other Funds to Support the Program(s)? YES NO

Millage, partner organizations, contributions

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Lots of promotion and outreach, multiple outlets/social media, faith community

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget
Grant Funds Requested	6611	5500
Total Unit Rate	POS	POS
Grant Unit Rate	POS	POS
Number of Units	43	43
Program Income	0	0
Unduplicated Clients Served	Not indicated	10 as reported in NAPIS

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Case Coordination & Support

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
Good referral and coordination process

3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:

See page 3 of grant – 253 hours annually, RN contract w/ ProMedica, Person centered approach

4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

Promedica, AAA, MDHHS/Adult Services, medical providers

C. Other Funds to Support the Program(s)? YES NO

Senior millage

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. **COST** (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22
Grant Funds Requested	6295	6005
Total Unit Rate	28.13	27.12
Grant Unit Rate	24.90	12.50
Number of Units	253	543
Program Income	0	0
Unduplicated Clients Served	278	278

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Chore

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
Outdoor chores mostly – leaves, windows, lawn, snow removal
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
 Use local service organizations (including high school students/clubs),
 professional companies & individuals to perform the tasks

C. Other Funds to Support the Program(s)? YES NO
 Senior millage

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities

 Greatest in need, promoting widely

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget
Grant Funds Requested	3360	2500
Total Unit Rate	POS	POS
Grant Unit Rate	POS	POS
Number of Units	273	250
Program Income	525	310
Unduplicated Clients Served	50 or more	8 as reported in NAPIS FY19-20

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Disease Prevention/Health Promotion

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO
2. Innovation: perceived innovative aspects are listed? YES NO
EBDP Approved programs: Arthritis Foundation Aquatics Program;
3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
Program offered 6x per year
4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO
2. HHS-441 YES NO
3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- | | | | |
|-------------------------------|------------------------------------|---|---|
| | Arthritis program | Agency | |
| <input type="checkbox"/> None | <input type="checkbox"/> 1-5 years | <input checked="" type="checkbox"/> 5-9 years | <input checked="" type="checkbox"/> 10+ years |

B. Other Local Programs & Collaborative Efforts: (LIST)

Browne Aquatic Center in CW

C. Other Funds to Support the Program(s)? YES NO
Senior millage

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**
FY22 budget

Grant Funds Requested	3705	3695
Total Unit Rate	POS	POS
Grant Unit Rate	POS	POS
Number of Units	1130	1130
Program Income	0	0
Unduplicated Clients Served	Not indicated	150 as reported in NAPIS FY19-20

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)
PROGRAM: Friendly Reassurance

DATE OF REVIEW: 8/12/22

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO
 2. Innovation: perceived innovative aspects are listed? YES NO
Care packages provided for comfort
 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
- Page 2
4. Person-Centered Thinking activities/intent is identified? YES NO
Page 2

B. ASSURANCES

1. Agreement YES NO
2. HHS-441 YES NO
3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- FriendlyRe. Agency
- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

Multiple in home & community-based services

C. Other Funds to Support the Program(s)? YES NO
 Senior Millage

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Participants are identified/referred by COA in home assessors or direct care workers – existing clients who participate in other programs

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 Budget
Grant Funds Requested	1680	1950
Total Unit Rate	POS	POS
Grant Unit Rate	POS	POS
Number of Units	40	40
Program Income	0	0
Unduplicated Clients Served	40	30 as reported in NAPIS FY20-21

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)
PROGRAM: Gap Filling

DATE OF REVIEW: 8/12/22

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program?
AAA regional service definition YES NO
2. Innovation: perceived innovative aspects are listed? YES NO
3. Outcome measures are identified? Time limited?
Measurable? LIST: YES NO
4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO
2. HHS-441 YES NO
3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- | | | | |
|-------------------------------|---|------------------------------------|---|
| | Gap Filling | Agency | |
| <input type="checkbox"/> None | <input checked="" type="checkbox"/> 1-5 years | <input type="checkbox"/> 5-9 years | <input checked="" type="checkbox"/> 10+ years |

- B. Other Local Programs & Collaborative Efforts: (LIST)
 Multiple programs/community based services
 Refer to other agencies/orgs to coordinate needs – jacob’s well, mdhhs, aaa, ca, etc
- C. Other Funds to Support the Program(s)? YES NO
 Senior millage
- D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Inhome services staff make referrals (existing clients) for gap filling service
- E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

- A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget
Grant Funds Requested	1260	1000
Total Unit Rate	POS	POS
Grant Unit Rate	POS	POS
Number of Units	10	10
Program Income	0	0
Unduplicated Clients Served	4 or more	Not available

Notes:
 Goods/services not otherwise provided/available – unique to health and safety needs

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Homemaking

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
RN contract w/ Promedica if needed
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
 Multiple! Community Health Agency, ProMedica Coldwater Regional Hospital, Branch County Veterans Affairs Office, Branch County Department of Health and Human Services (DHHS), and Pines Behavioral Health

C. Other Funds to Support the Program(s)? YES NO
 Senior millage, suggested donation \$5/hour

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Bureau eligibility, targeting those greatest in need; referrals to other 3rd party, health plans, mdhhs when appropriate. Functional status

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 HCA
Grant Funds Requested	40390	47040
Total Unit Rate	22.68	21.42
Grant Unit Rate	16.10	12.75
Number of Units	2509	5216
Program Income	11267	13350
Unduplicated Clients Served	127	200

Notes: Home Care Assistance: combination of Homemaking and personal care

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)

DATE OF REVIEW: 8/12/22

PROGRAM: Personal Care

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
14 in home aides, highly trained, RN contract w/ promedica
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
Page 5
- 4. Person-Centered Thinking activities/intent is identified? YES NO
Page 5

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
Multiple! Collaborate w/ mdhhs, CHA, AAA, home health providers, VA, Pines, medical offices, hospital etc
- C. Other Funds to Support the Program(s)? YES NO
Senior millage, donation \$5/hour suggested
- D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Operating standards eligibility
- E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe: client satisfaction survey/feedback (with homemaking too!)

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

- A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget HCA
Grant Funds Requested	6576	47040
Total Unit Rate	22.56	21.42
Grant Unit Rate	16.71	12.75
Number of Units	393	5216
Program Income	1445	13350
Unduplicated Clients Served	24	200

Notes: Home Care Assistance is a combination of Homemaking AND personal Care!

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Branch COA
(code if competitive bid)
PROGRAM: In Home Respite Care

DATE OF REVIEW: 8/12/22

REVIEWED BY: LAS/NRS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO

2. Innovation: perceived innovative aspects are listed? YES NO
 Provided by BCOA and also arranged outside BOCA hours to meet family/individual needs

3. Outcome measures are identified? Time limited? YES NO
 Measurable? LIST:
 Page 2 & 4

4. Person-Centered Thinking activities/intent is identified? YES NO
 Page 2 & 4

B. ASSURANCES

1. Agreement YES NO

2. HHS-441 YES NO

3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
Multiple!

C. Other Funds to Support the Program(s)? YES NO

Senior millage, cost sharing/donation request

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Bureau standards

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget
Grant Funds Requested	\$12,020 2,000 / 10,020	\$8,254
Total Unit Rate	POS / 19.00	14.60
Grant Unit Rate	POS / 14.91	12.75
Number of Units	672	943
Program Income	1445	2700
Unduplicated Clients Served	96	35

Notes: \$2,000 will be used as Purchase of Service; \$10,020 as unit rate reimbursement
COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____



KALAMAZOO COUNTY GOVERNMENT

In the Pursuit of Extraordinary Governance...

August 1, 2022

Ms. Laura Sutter, Director
Branch - St. Joseph Area Agency on Aging IIIC
570 N. Marshall Road
Coldwater, MI 49036

Ms. Sutter,

Please accept this letter as formal notification that Kalamazoo County's Area Agency on Aging Region IIIA (AAAIIA) seeks to continue the contractual Long Term Care Ombudsman Program partnership with the Branch - St. Joseph Area Agency on Aging Region IIIC (AAAIIC), for the upcoming Fiscal Year 22/23. With AAAIIA's allocation of Title IIIB grant funding for the prevention of elder abuse and Long Term Care Ombudsman services, AAAIIA remains active as the regional host agency and remains consistent in the adherence of funding standards set forth by Michigan's Bureau of Aging, Community Living, and Supports. Under this contract, AAAIIA's budget reflects annual income in the amount of \$2,000.00 from AAAIIC for the continued provision of host agency services.

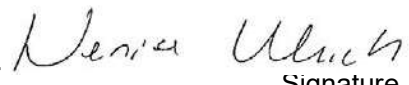
We look forward to our continued partnership,

Don Saldia, Division Chief – Older Adult Services

**HEALTH AND COMMUNITY SERVICES DEPARTMENT
AREA AGENCY ON AGING IIIA**

311 East Alcott St. | Kalamazoo, MI 49001
Phone: 269.373.5173 | www.kalcounty.com/aaa

FY 22/23 BUDGET

Program Elder Abuse Prevention/LTC Ombudsman		Report Period thru		Date 12-Aug-2022	
Local Agency Area Agency on Aging IIIA		Contract #		Agreement Period 10/01/22 thru 09/30/2023	
OBJECT CLASS CATEGORY		Current Period	Agreement YTD	AGREEMENT	
				Budget	Balance
1	Salaries & Wages		-	60,300	60,300
2	Fringe Benefits		-	22,100	22,100
3	Travel		-	500	500
4	Supplies & Materials		-	400	400
5	Occupancy		-	3,300	3,300
6	Communications		-	2,900	2,900
7	Professional Services		-	-	-
8	Equipment		-	-	-
9	Other Direct Expenses: Training & Adv.	-	-	100	100
10	TOTAL DIRECT	-	-	89,600	89,600
11	Indirect Costs/Administration		-	20,521	20,521
12	TOTAL EXPENDITURES	-	-	110,121	110,121
13	Less Program Income	-	-		-
14	Less USDA Reimbursement	-	-	-	-
15	FUNDS REQUIRED	-	-	110,121	110,121
SOURCE OF FUNDS					
16	AAA Grant: Region IIIC		-	2,000	2,000
17	AAA Grant: Title IIIB & VIIA		-	13,389	13,389
18	Other Local Grant		-	2,437	2,437
19	Other: MI State Ombudsman		-	13,269	13,269
20	Other: Title VII - EAP		-	8,594	8,594
21	Other: State Ombudsman		-	30,216	30,216
22	Other: General Fund/Other grants		-	40,216	40,216
23	TOTAL FUNDING	-	-	110,121	110,121
<p>CERTIFICATION: I certify that I am authorized to sign on behalf of the local agency and that this is a true and correct statement of expenditures and collections for the report period. Appropriate documentation is available and will be maintained for the required period to support costs and receipts reported.</p>					
			 Signature		
			Financial Operations Manager Title		12-Aug-2022 Date

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Legal Services of South Central MIDATE OF REVIEW: 08/11/2022
(code if competitive bid)

PROGRAM: Legal Services

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
Outreach programs
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
Tracking program in their computer system, surveys
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

211, Community Action, Legal Hotline for MI Seniors and local senior centers

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Most impending and critical cases will be taken on while other less critical will be referred out if need be.

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:
Verbal/written feedback surveys

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**

Grant Funds Requested	12000	20560
Total Unit Rate	46	46
Grant Unit Rate	40	40
Number of Units	300	381
Program Income	0	0
Unduplicated Clients Served	70	79

Notes: AVAILABLE \$12,000 Comparison is FY22 Budget

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: Caregiver EST

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
DHHS, CAA, Veteran Affairs and USDA Rural Housing

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	9129	5500
Total Unit Rate	0	337.49
Grant Unit Rate	POS	POS
Number of Units	0	18
Program Income	0	0
Unduplicated Clients Served	60	63

Notes: Comparison is FY22 Caregiver EST

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: CCS

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	8694	8284
Total Unit Rate	63.38	45.25
Grant Unit Rate	56.09	8.71
Number of Units	155	207
Program Income	0	0
Unduplicated Clients Served	78	745

Notes: Comparison is FY22 Case Coordination and Support

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: St Joe COA
(code if competitive bid)
PROGRAM: Chore

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
 Run a Road to Recovery Program that they work closely with hospitals and rehab centers

C. Other Funds to Support the Program(s)? YES NO
 Local fund sources

- D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities

They have a Waiting List Prioritization Policy in place

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**

Grant Funds Requested	3,500	4,640
Total Unit Rate	29.17	45.38
Grant Unit Rate	10.68	34.27
Number of Units	143	135
Program Income	216	900
Unduplicated Clients Served	47	135

Notes: Comparison is FY22 Budget Chore

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: Congregate Meals

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
Offering an healthy cooking/nutrition day each month
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	91519	55561
Total Unit Rate	10.27	7.32
Grant Unit Rate	7.55	6.63
Number of Units	12115	14939
Program Income	20954	46577
Unduplicated Clients Served	710	911

Notes: Comparison is FY22 Congregate Meals

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: Disease Prevention

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program? YES NO
2. Innovation: perceived innovative aspects are listed? YES NO
Offering 2 EBDP programs at the senior centers in Sturgis and Three Rivers, also Arthritis Exercise, Arthritis Exercise – Taking it Easy and Stay Active and Independent for Life in both Sturgis and Three Rivers
3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO
2. HHS-441 YES NO
3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	5116	5116
Total Unit Rate	0	0
Grant Unit Rate	POS	POS
Number of Units	0	0
Program Income	0	0
Unduplicated Clients Served	300	300

Notes: Comparison is FY22 Budget Disease Prevention

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: Friendly Reassurance

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	2,320	2,650
Total Unit Rate	0	36.21
Grant Unit Rate	0	0.91
Number of Units	0	83
Program Income	0	0
Unduplicated Clients Served	51	1380

Notes: Comparison is FY22 Budget Friendly Reassurance

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: GAP

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)
 DHHS, CAA, Veterans Administration, SJ Habitat for Humanity, and
 USDA Rural Housing

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 Prioritized Wait List Policy, Marketing Outreach

E. QUALITY IMPROVEMENT/ASSURANCE YES
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	1740	
Total Unit Rate	0	
Grant Unit Rate	POS	
Number of Units	0	
Program Income	0	
Unduplicated Clients Served	12	

Notes:

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: HDM

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	175,480	193,077
Total Unit Rate	8.63	7.43
Grant Unit Rate	6.09	1.99
Number of Units	28,831	38,342
Program Income	50,545	66,612
Unduplicated Clients Served	114	949

Notes: Comparison is FY22 Budget HDM

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: SJCOA
(code if competitive bid)
PROGRAM: ~~Disease Prevention~~
Home Repair

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

1. The proposal addresses the minimum standards for the described program?
 YES NO
2. Innovation: perceived innovative aspects are listed? YES NO
Restructuring a group of 5 volunteers to meet and discuss repairs on a monthly basis.
3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

1. Agreement YES NO
2. HHS-441 YES NO
3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

Habitat for Humanity, DHHS, CAA, Veteran Affairs and USDA Rural Housing

C. Other Funds to Support the Program(s)? YES NO
Grants and local funding such as teaming up with Home Depot and Menards

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Residential Service Manager and volunteers will meet and discuss

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe: home inspected by a contractor and Residential Service Manager,
clients provided satisfaction surveys as well.

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL

	Bidder	Other Comparison
Grant Funds Requested	4640	3480
Total Unit Rate	0	141.20
Grant Unit Rate	POS	POS
Number of Units	0	27.9
Program Income	0	0
Unduplicated Clients Served	24	24

Notes: Comparison is FY22 Budget Home Repair

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: St Joe COA
(code if competitive bid)
PROGRAM: Homemaking

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
Run a Road to Recovery Program that they work closely with hospitals and rehab centers

C. Other Funds to Support the Program(s)? YES NO
Local fund sources

- D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities

They have a Waiting List Prioritization Policy in place

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**

Grant Funds Requested	32,428	65,039
Total Unit Rate	44.42	29.73
Grant Unit Rate	35.82	9.06
Number of Units	905	3360
Program Income	4,216	26,412
Unduplicated Clients Served	228	604

Notes: Comparison is FY22 Budget HCA

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: St Joe COA
(code if competitive bid)
PROGRAM: Personal Care

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
 Run a Road to Recovery Program that they work closely with hospitals and rehab centers

C. Other Funds to Support the Program(s)? YES NO
 Local fund sources

- D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities

They have a Waiting List Prioritization Policy in place

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**

Grant Funds Requested	32,429	65,039
Total Unit Rate	44.42	29.73
Grant Unit Rate	38.88	9.06
Number of Units	501	3360
Program Income	240	26,412
Unduplicated Clients Served	120	604

Notes: Comparison is FY22 Budget HCA

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: St Joe COA
(code if competitive bid)
PROGRAM: Respite

DATE OF REVIEW: 08/12/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

- B. Other Local Programs & Collaborative Efforts: (LIST)
 Run a Road to Recovery Program that they work closely with hospitals and rehab centers

C. Other Funds to Support the Program(s)? YES NO
 Local fund sources

- D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities

They have a Waiting List Prioritization Policy in place

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL **Bidder** **Other Comparison**

Grant Funds Requested	16,600	15,680
Total Unit Rate	44.32	28.45
Grant Unit Rate	35.66	11.99
Number of Units	279	679
Program Income	1,124	1,596
Unduplicated Clients Served	36	46

Notes: Comparison is FY22 Budget Respite

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: St. Joseph County Transportation Authority DATE OF REVIEW: 08/12/2022
(code if competitive bid)

PROGRAM: Transportation Services
Medical Escort

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
- 2. Innovation: perceived innovative aspects are listed? YES NO
- 3. Outcome measures are identified? Time limited? Measurable? LIST: YES NO
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

- None 1-5 years 5-9 years 10+ years

B. Other Local Programs & Collaborative Efforts: (LIST)

C. Other Funds to Support the Program(s)? YES NO
 Local millage funds, MDOT Specialized Service funds, and Federal funds

D. METHOD OF PRIORITIZATION & TARGETING
 Including all racial/ethnic communities and LGBTQ+ communities
 None

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
 Describe:

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 budget
Grant Funds Requested	22,100/4,000	20,500/2,100
Total Unit Rate	11.63/43.29	11.47/43.01
Grant Unit Rate	2.11/2.35	2.11/2.35
Number of Units	10,000/2,000	10,000/2,000
Program Income	0	11,000/5,975
Unduplicated Clients Served	1080/304	1031

Notes:

Bidder did not attend mandatory Pre-Proposal Bidders Conference

Bidder submitted grant late (Due Aug. 1; submitted after email notification sent on Aug. 2)

COST SCORE (max 50): _____

TOTAL SCORE (maximum 100): _____

Branch-St. Joseph AAA (IIC) FY2023-2025 PROPOSAL SUMMARY SHEET

BIDDER: Thurston Woods
(code if competitive bid)
PROGRAM: Adult Day Care

DATE OF REVIEW: 08/10/2022

REVIEWED BY: NRS/LS

COMPETITIVE BID? Yes No

I. CLARITY AND COMPLETENESS (maximum of 25 points)

A. PROGRAM PLAN/OBJECTIVES:

- 1. The proposal addresses the minimum standards for the described program? YES NO
Multiple policies included as well
- 2. Innovation: perceived innovative aspects are listed? YES NO
6am – 6pm availability; possible for eve and/or weekend respite
Part of a larger long-term care/continuing care organization
- 3. Outcome measures are identified? Time limited? YES NO
Measurable? LIST:
Discuss the desire for more participants
- 4. Person-Centered Thinking activities/intent is identified? YES NO

B. ASSURANCES

- 1. Agreement YES NO
- 2. HHS-441 YES NO
- 3. Minimum Standards Assurance YES NO

Thurston Woods did not sign our Assurances.

CLARITY & COMPLETENESS SCORE (max 25): _____

II. ORGANIZATIONAL CAPACITY (a maximum of 25 points)

A. PROGRAM EXPERIENCE

Thurston Woods est. 1954 None 1-5 years 5-9 years 10+ years
Adult Day Program

B. Other Local Programs & Collaborative Efforts: (LIST)
Continuing care retirement community/campus

C. Other Funds to Support the Program(s)? YES NO

D. METHOD OF PRIORITIZATION & TARGETING
Including all racial/ethnic communities and LGBTQ+ communities
Marketing plan included; outreach to all including low income and minority

E. QUALITY IMPROVEMENT/ASSURANCE YES NO
Describe:

Evaluation plan; participant/family feedback

ORGANIZATIONAL CAPACITY SCORE (max 25): _____

III. COST (a maximum of 50 points)

A. BUDGET COMPLETE? YES NO

B. UNIT RATE DETAIL	Bidder	Other Comparison FY22 BUDGET
Grant Funds Requested	\$46,563	41,711
Total Unit Rate	\$27.65	29.55
Grant Unit Rate	\$19.45	19.23
Number of Units	2394	2169
Program Income	\$13,575	16960
Unduplicated Clients Served	3 (capacity 12)	3

Notes: **\$42,700 AVAILABLE**
DID NOT BID ON CAREGIVER ED, SUPPORT & TRAINING (FOR SUPPORT GROUP ACTIVITY)

COST SCORE (max 50): _____
TOTAL SCORE (maximum 100): _____