



## **Request for Proposals and Program Guidelines 2024:**

*Expanding and Refining Models for Volunteer Programs to Support Older Adults,  
People with Disabilities, and their Family Caregivers*

### **Local Models Program**

**Issued October 2024**

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## 1. Grant Overview

### 1.1. Background

- 1.1.1. In 2024, the Oasis Institute received a second five-year cooperative agreement from the U.S. Administration for Community Living/Administration on Aging (ACL/AoA) to implement the Volunteer Community Care Corps. This program, *Community Care Corps*, is administered by Oasis in cooperation with USAging and Caregiver Action Network (referred to as “Administrators” in this Request for Proposals) with Altarum, a nonprofit research and consulting organization, providing program evaluation and consultation to the Administrators.
- 1.1.2. This is the 2024 Request for Proposals (RFP) cycle under the second five-year federal cooperative agreement.
- 1.1.3. Through an independent review committee and a competitive grant-award process, the Administrators will distribute funds to foster the development, expansion and refinement of innovative volunteer nonmedical assistance models which support older adults, people with disabilities age 18 and older, and their family caregivers. This initiative will increase the number of community-based volunteer programs available to provide nonmedical assistance while decreasing the number of older adults, persons with disabilities age 18 and older, and family caregivers who need assistance in maintaining independence in the community but are unable to obtain help.
- 1.1.4. The Administrators will evaluate the effectiveness of those models in different communities nationally and work with grantees to identify Effective Elements, those conceptual approaches used in model development and implementation that improve outcomes, reduce barriers and are replicable. These effective elements will be compiled into the Community Care Corps Learning Library so individuals and organizations across the country may use them to develop, implement and right size a local model for their community.

### 1.2. Request for Proposals

- 1.2.1. The Administrators are seeking proposals for innovative local models in which volunteers assist family caregivers or directly assist older adults or persons with disabilities age 18 and older with nonmedical care in order to maintain their independence.
- 1.2.2. Funds are awarded to local organizations across the country to develop, expand or refine volunteer models in home or community-based settings which provide only nonmedical assistance to support older adults, persons with disabilities age 18 and older and family caregiver.
- 1.2.3. Administrators seek proposals incorporating the following focus areas in its nonmedical volunteer assistance local model:
  - 1.2.3.1. Leverages the opportunities and principles within the 2022 National Strategy to Support Family Caregivers;
  - 1.2.3.2. Supports grandparent and kinship-led households;
  - 1.2.3.3. Expands and refines models for program implementation including off the shelf materials;

- 1.2.3.4. Utilizes college interns as volunteers;
- 1.2.3.5. Expands remote, virtual, and low tech program implementation opportunities;
- 1.2.3.6. Screens and trains volunteer chaperones to accompany older adults and persons with disabilities age 18 and older in need to and from non-emergency medical appointments and outpatient procedures. Volunteer chaperone models must:
  - 1.2.3.6.1. Deliver services door through door;
  - 1.2.3.6.2. Assist with needs pre- and post- appointments;
  - 1.2.3.6.3. Include appropriate stakeholders;
  - 1.2.3.6.4. Address care recipient expectations and needs before and after non-emergency medical appointments and outpatient procedures.
- 1.2.3.7. Utilizes volunteers for program administration and operation as opportunities for professional skills building;
- 1.2.3.8. Increases access to respite programs to all caregivers;
- 1.2.3.9. Provides bystander and safe spaces training for volunteers and families (provided by Community Care Corps);
- 1.2.3.10. Provides Person-Centered Approaches training to volunteers and staff (provided by Community Care Corps).
- 1.2.4. The Administrators understand and appreciate the distinct phases of program implementation and are seeking applications in these specific stages:
  - 1.2.4.1. Model Development includes the creation and launch of your local model:
    - 1.2.4.1.1. Identifying an unmet community need;
    - 1.2.4.1.2. Designing a new local model to meet that unmet need;
    - 1.2.4.1.3. Developing the model's infrastructure;
    - 1.2.4.1.4. Identifying and establishing relationships with community partners;
    - 1.2.4.1.5. Piloting your local model in your community.
  - 1.2.4.2. Model Expansion includes growing and scaling your local model to reach more people:
    - 1.2.4.2.1. Introducing new types of volunteer nonmedical assistance;
    - 1.2.4.2.2. Adding new targeted audiences;
    - 1.2.4.2.3. Expanding the model's geographic reach;
    - 1.2.4.2.4. Expanding collaborations and partnerships.
  - 1.2.4.3. Model Refinement includes improving and optimizing your local models existing elements:
    - 1.2.4.3.1. Improving your local model's quality, efficiency, effectiveness and engagement;
    - 1.2.4.3.2. Utilizing lessons learned and feedback from participants and volunteers to better meet the needs of the community;

- 1.2.4.3.3. Adjusting strategies to improve outcomes and overall impact.
- 1.2.5. Applicants who have not previously been funded, past and current grantees are eligible to submit applications. Continuation grants are not allowed.
- 1.2.6. The Administrators will only commit to fund applicants for one grant period of 18 months.
- 1.2.7. Currently, federal funds are not secured beyond one funding cycle. Therefore, applicants should consider this a single cycle grant.
- 1.2.8. Grantees should provide plans for sustainability beyond the 18-month grant period.

## **2. Application Eligibility and Logistics**

### **2.1. Eligibility**

- 2.1.1. A range of entity types are encouraged to apply. The Administrators wish to fund local models that represent a diverse cross section of the nation reflective of geography, urban/suburban/rural/frontier, and tribal communities, limited English-speaking populations and underserved communities.
- 2.1.2. Examples of the types of organizations that are eligible to apply are:
  - 2.1.2.1. Domestic public or private non-profit entities;
  - 2.1.2.2. Local communities;
  - 2.1.2.3. State, county, and local governments;
  - 2.1.2.4. Indian tribal governments and organizations (American Indian/Alaskan Native/Native American);
  - 2.1.2.5. Faith-based organizations;
  - 2.1.2.6. Community-based organizations;
  - 2.1.2.7. Hospitals and health care systems;
  - 2.1.2.8. Institutions of higher education;
  - 2.1.2.9. Local aging services organizations as defined in [102\(5\) of the Older Americans Act of 1965](#);
  - 2.1.2.10. Centers for independent living as defined in [section 702 of the Rehabilitation Act of 1973](#);
  - 2.1.2.11. AmeriCorps;
  - 2.1.2.12. Time-banking or volunteer agencies with expertise in the delivery of home and community-based services to older adults and persons with disabilities age 18 and older;
  - 2.1.2.13. Entities with expertise in the delivery of services and supports to older adults, persons with disabilities age 18 and older, and family caregivers.
- 2.1.3. Private and nonprofit organizations may partner in a single application, but the organization designated as the lead applicant, recipient and manager of award funds must be a nonprofit organization. The lead applicant will be required to submit letters of commitment from the partnering organizations confirming their participation in the proposed local model.

- 2.1.4. An organization may only apply for this grant through one application per year and cannot apply for itself and be part of an application involving more than one organization.
- 2.2. Funding Limitations and Requirements
  - 2.2.1. Funding may **NOT** be used for:
    - 2.2.1.1. Medical assistance;
    - 2.2.1.2. Professional health care services;
    - 2.2.1.3. Institutional care;
    - 2.2.1.4. Income maintenance or financial assistance;
    - 2.2.1.5. Grants to individuals;
    - 2.2.1.6. Attendance at conferences or professional development activities, unless it is in the capacity as a presenter about this program;
    - 2.2.1.7. Endowments, capital campaigns, or fundraising;
    - 2.2.1.8. Publication subsidies and advertising costs for general organization operations unrelated to this program;
    - 2.2.1.9. Lobbying or political activities;
    - 2.2.1.10. Basic research (e.g., scientific or medical experiments);
    - 2.2.1.11. Construction or rehabilitation of buildings;
    - 2.2.1.12. Equipment purchases, including vehicles, unless such equipment is fundable under [Title IV of the Older Americans Act](#);
    - 2.2.1.13. Limitations related to the use of grant funds for meals can be found [here](#).
  - 2.2.2. Successful applicants must have a Unique Entity ID and SAM registration by the time funding is disbursed (see Section 5.5.).
  - 2.2.3. Funds awarded by the Administrators in this program are comprised of federal funds and are considered government grant dollars with all the stipulations that apply, as cited in Section 5.4.2.
- 2.3. Grant Timeline
  - 2.3.1. Application Process Overview:
    - 2.3.1.1. **Informational Webinar:** One optional informational webinar will be held for interested parties on **October 22, 2024 at 2:00 ET**. The webinar will be recorded and posted to the [Community Care Corps website](#);
    - 2.3.1.2. Questions received in advance at [Info@CommunityCareCorps.org](mailto:Info@CommunityCareCorps.org) will receive priority on the call. No individual programmatic assistance or support will be provided before or during the application submission window other than that provided during the informational webinar. Technical assistance to access or utilize the submission portal can be requested at [techsupport@communitycarecorps.org](mailto:techsupport@communitycarecorps.org) . Applicants are encouraged to review the FAQ located on the [Community Care Corps website](#).
    - 2.3.1.3. Webinar log-in information will be posted on the website, [CommunityCareCorps.org](#).

- 2.3.2. Application Timeline (The timeline is subject to change. The application due date will not be moved to a date before December 11, 2024. Please periodically check [CommunityCareCorps.org](https://CommunityCareCorps.org) for updates):
  - 2.3.2.1. **October 16, 2024:** RFP available for viewing at [CommunityCareCorps.org](https://CommunityCareCorps.org);
  - 2.3.2.2. **October 28, 2024:** Application submission window opens;
  - 2.3.2.3. **December 11, 2024 at 5:00 pm ET:** Application submission window closes. No exceptions will be allowed;
  - 2.3.2.4. **March 17, 2025:** Anticipated date for award announcements;
  - 2.3.2.5. **April 1, 2025-September 30, 2026:** Anticipated 18-month grant cycle for new grantees.

### 3. Eligible Populations and Volunteer Assistance

- 3.1. Eligible populations: Local model volunteer programs must assist one or more of three eligible populations:
  - 3.1.1. Persons age 60 and older who have difficulty living independently and who require assistance with Instrumental Activities of Daily Living (such as cooking or doing laundry);
  - 3.1.2. Persons over age 18 with a disability (as defined in Section 3 of the [Americans with Disabilities Act of 1990](#)) who have difficulty living independently and who require assistance with Instrumental Activities of Daily Living (such as cooking or doing laundry);
  - 3.1.3. Family caregivers:
    - 3.1.3.1. The term ‘family caregiver’ means an unpaid adult family member or other individual (e.g. foster parent, friend, neighbor) who provides assistance to an individual who has difficulty living independently;
    - 3.1.3.2. Volunteer assistance provided to family caregivers is intended to support their role as caregivers.
- 3.2. Volunteer Assistance
  - 3.2.1. Local model volunteer programs must:
    - 3.2.1.1. Address an unmet need in the community;
    - 3.2.1.2. Be delivered in home or community-based (non-institutional) settings;
    - 3.2.1.3. Provide nonmedical assistance to one or more members of the identified Eligible Populations (see section 3.1.) supporting the achievement or maintenance of the highest level of independence in the community;
    - 3.2.1.4. Provide assistance in coordination with a family caregiver, if applicable;
    - 3.2.1.5. Recruit and train volunteers age 18 and older. Training must include:
      - 3.2.1.5.1. CPR;
      - 3.2.1.5.2. Person-Centered Approaches;
      - 3.2.1.5.3. Safe spaces and Bystander Intervention;

- 3.2.1.5.4. Recognizing and reporting abuse, neglect and exploitation.
- 3.2.1.6. Conduct a criminal background check on their volunteers. The Administrators will offer technical assistance to support protocols for criminal background checks consistent with the requirements of the [Nationwide Program for National and State Background Checks for Direct Patient Access Employees of Long-Term Care Facilities and Providers](#);
- 3.2.1.6.1. At a minimum, background checks must meet state requirements. Applicants can refer to [CommunityCareCorps.org](#) and the [Effective Elements Learning Library](#) for additional information.
- 3.2.1.7. Ensure that any personal identifying information (PII) from volunteers or from those receiving volunteer assistance is kept secure.
- 3.2.2. Local models can provide a wide range of volunteer assistance meeting the needs of their community.
- 3.2.3. Volunteer assistance **MUST** be nonmedical assistance. Volunteer assistance **MUST NOT** include any form of health care service including personal care services or medical advocacy during appointments.
- 3.2.4. Applicants are encouraged to be innovative in their approaches in determining what volunteer assistance would be particularly useful to address the unmet needs of the eligible populations they intend to serve. Applicants are encouraged to consider health equity and social determinants of health. Innovation for one organization might not be considered innovation for another.

#### 4. **Funding**

##### 4.1. **Award Amounts**

- 4.1.1. The Administrators will award 18-month grants ranging in size from **\$30,000 to \$200,000** to applicants who are developing, expanding or refining a local model per section 1.2.4.
- 4.1.2. This RFP process will be competitive. **Not all applications will receive funding, and those that do receive funding may not receive the full amount requested.**
- 4.1.3. This funding opportunity operates as a reimbursement grant. Selected grantees will be eligible for reimbursement of incurred expenses on a quarterly basis only. Grantees must submit a Quarterly Financial Report (to be provided) and invoice to receive reimbursement for eligible costs.
- 4.1.4. Selected grantees will have the option to request a 10% early disbursement of their requested federal funding amount at the start of the grant cycle.

##### 4.2. **Grant Period**

- 4.2.1. The grant period will be for 18 months.
  - 4.2.1.1. Proposed local models do not have to be new projects to an organization. However, funding must be used to develop, expand



or refine your local model, see section 1.2.4. Funds must be used to supplement, not supplant, funding that would otherwise be available for volunteer activities.

4.2.1.2. Successful applicants will be allowed to use up to six months at the start of the grant period for program development.

4.3. Match Requirements

4.3.1. All grantees are required to contribute a **minimum match equal to 25% of the total program budget. Total Program Budget = Federal Funds Requested + Match. The match may be comprised of cash, in-kind contributions, or a combination of both.** For example, an organization applying for a grant of \$120,000 will be expected to contribute a \$40,000 match, bringing the total program budget to \$160,000. Calculate minimum match as follows:

**Federal Funds Requested / 3 = Minimum Match Amount.** Applicants who do not use this calculation to determine match will not be moved forward for consideration. The budget form and budget narrative also contain the formula to assist in determining the minimum 25% match requirement.

4.3.2. Matching resources take on the characteristics of the Administrators and federal funds and are therefore subject to the same rules regarding their use.

4.3.3. Grantees are responsible for raising minimum matches.

4.3.4. All proposals must detail the sources of their proposed match. Possible sources of match may include, but are not limited to:

4.3.4.1. In-kind contributions:

4.3.4.1.1. Volunteered time;

4.3.4.1.2. Use of facilities to hold meetings.

4.3.4.2. Program fees or other earned revenue from the applicant organization's budget;

4.3.4.3. State government grants;

4.3.4.4. Local government grants;

4.3.4.5. Foundation grants/contributions;

4.3.4.6. Corporate grants/contributions;

4.3.4.7. Individual contributions;

4.3.4.8. Other contributions.

4.3.5. The following sources **cannot** be used toward the match:

4.3.5.1. Federal funds;

4.3.5.2. Funds used to match other grants.

Expectations and Compliance

5.1. Expectations

5.1.1. Implementation is defined as progress toward program launch and does not necessarily mean service delivery.

5.1.2. Grantees join a community of practice and are required to participate in technical assistance activities, including:

5.1.2.1. Grant Cycle Kickoff meeting;

5.1.2.2. Monthly calls with the Administrators' Community Care Corps

- Project Director and others;
- 5.1.2.3. A minimum of two (2) technical assistance webinars or conference calls per year;
- 5.1.2.4. Fiscal monitoring with the Oasis grant accountant;
- 5.1.2.5. Learning collaboratives to share information with other grantees;
- 5.1.2.6. One virtual site visit with the Community Care Corps Administrators.
- 5.1.3. Grantees are expected to address sustainability of their local models beyond the grant period and to work with the Administrators on sustainability plans as appropriate.
- 5.1.4. Grantees are required to evaluate participants using a pre- and post-survey provided by the Administrators as described in Section 5.3., including distributing user-friendly pre- and post- surveys (survey forms will be provided) to all persons receiving and providing volunteer assistance in the grantee's local model, collecting the completed surveys and loading the responses into the provided database.
- 5.1.5. Grantees are required to collect a minimum of two (2) short videos featuring caregivers and care recipients receiving assistance. Community Care Corps will provide video editing.
- 5.1.6. Grantees are required to provide at minimum two (2) written quotes or testimonials per quarter demonstrating the impact of their local model.
- 5.1.7. Grantees are expected to participate in social media promotion to enhance dissemination of Community Care Corps and grantee specific content and activities.
  - 5.1.7.1. Grantees participating in social media promotion must include #communitycarecorps in all posts and notify Community Care Corps of social media postings to be boosted;
  - 5.1.7.2. Grantees that do not participate in social media promotion are required to provide content to Community Care Corps to post on its social media accounts on the grantee's behalf.
- 5.2. Reporting Requirements

All grantees are required to submit the following reports in electronic format using reporting instruments that will be provided:

  - 5.2.1. Quarterly Budget and Spending Report (utilizing the form provided);
  - 5.2.2. Quarterly Evidence of Match Report (utilizing the form provided);
  - 5.2.3. Quarterly Outputs Report (reported within the grantee portal);
  - 5.2.4. Outcomes Reporting using Care Recipient and Family Caregiver Pre- and Post-Surveys captured, at a minimum, at start and end of service (utilizing the forms provided);
  - 5.2.5. Outcomes Reporting using Volunteer Post-Surveys captured, at minimum, at the end of the volunteer's tenure or the end of the grant cycle, whichever comes first (utilizing the form provided);
  - 5.2.6. Semiannual narrative report at the end of quarters 2 and 4 (utilizing the format provided);
  - 5.2.7. End of program narrative summary at the end of quarter 6 (utilizing the

format provided).

### 5.3. Evaluation Efforts

- 5.3.1. An important aim of Community Care Corps is to evaluate the effectiveness of local models by collecting conceptual approaches that improve outcomes, reduce barriers and are replicable. The concepts, effective elements, housed in a web-based tool, informed by the successes, challenges and missteps of former Community Care Corps grantees, will enable other organizations to create impactful local models tailored to their community.
- 5.3.2. Grantees will be required to collect and report **at least 12 months** of data that aids in evaluation. Applicants may utilize up to 6 months of the available 18 months at the start of the grant cycle to build needed infrastructure.
- 5.3.3. Grantees will be required to report certain output data (see section 5.2.) within the grantee portal such as: number of older adults assisted; number of persons with disabilities age 18 and older assisted; number of family caregivers assisted; number of volunteers providing assistance; number of hours of volunteer nonmedical assistance provided and number of occurrences of each type of volunteer nonmedical assistance provided.
- 5.3.4. Grantees will be required to distribute a survey (see section 5.2.) to be filled out by individual family caregivers, older adults, and persons with disabilities age 18 and older receiving volunteer assistance (utilizing the forms provided).
  - 5.3.4.1. These surveys will capture self-reported data on the following outcome measures: caregiver stress and care recipient unmet need, loneliness, social isolation, perceived ability to continue living independently in the community, and assessment of person-centeredness of volunteer services. In addition, the following outcome measures, specific to volunteers, will include volunteer motivations, intent to continue volunteering, perceived benefits of volunteering, and knowledge and utilization of person-centered care practices.
  - 5.3.4.2. The data collected from these surveys is owned by the Administration for Community Living and will be accessed and analyzed by Altarum, a third-party evaluator. All grantees will have access to the aggregated data collected by their organization at the end of the grant period.

### 5.4. ACL Compliance

- 5.4.1. This grant program is funded by the Administrators through a cooperative agreement between the U.S. Administration for Community Living/Administration on Aging and Oasis Institute. The statutory authority for grants is contained in Title IV of the [Older Americans Act](#) (OAA) (42 U.S.C. 3030), as amended by the Older Americans Act Amendments of 2016, P.L. 114-144 (Catalog of Federal Domestic Assistance 93.048, Special Programs for the Aging Title IV and Title II Discretionary Projects).

5.4.2. The funds that will be awarded in response to this RFP will include federal funds. The applicants will need to agree to commit to the terms and conditions for receiving federal funds from the Administrators (which may change or be updated by the federal government during the program period). Awardees will be subject to the general provisions of [45 CFR Part 75](#).

5.5. Unique Entity ID and SAM Registration

5.5.1. Applicants must register to do business with the U.S. Federal Government by completing a registration process in the Federal System for Award Management, SAM.gov. As a part of that SAM.gov registration process, applicants will obtain a Unique Entity ID (formerly a Data Universal Numbering System (DUNS) number). If you are already registered in SAM.gov, then you have already been assigned a Unique Entity ID and it is viewable in your SAM.gov entity registration record. Proof of registration, including your entity's Unique Entity ID, must be supplied to the Administrators before funds are disbursed. Registration in SAM.gov and obtaining a Unique Entity ID is time consuming. As registration may take up to one month, it is recommended to begin that process now. If you have not already registered in SAM.gov, please click on this link, [SAM.gov](#), to complete your registration.

6. Review Process and Criteria

6.1. Review Process

6.1.1. The Administrators will convene an independent Review Committee to review applications. The committee is comprised of professionals with knowledge of family caregiving, aging services, disability services, volunteer programs, program planning and evaluation, and organizational capacity building.

6.1.1.1. The Review Committee will make funding recommendations based on application scores.

6.1.2. Final award decisions will be made by the Administrators. The Administrators will make final decisions based on proposal scores, innovation, inclusion of the focus areas listed in section 1.2.3., diversity of organization type, diversity of organization size, target population(s), diversity of population served, geographic region, and type of volunteer assistance provided to create a diverse pool of grantees required to meet the overall goals of the Community Care Corps program.

6.2. Review Criteria

6.2.1. The Review Committee will score applications based on responses to the instructions that appear in the Guidance section of this RFP, see Section 8.

## 7. Application

### 7.1. Application

- 7.1.1. Applications will be accepted through the online portal available at [CommunityCareCorps.org](https://CommunityCareCorps.org) from **October 28, 2024 to no later than 5:00 p.m. ET, December 11, 2024** (see section 2.3.).
- 7.1.2. If any technical support is required to complete your application in the SM Apply portal, please contact [techsupport@CommunityCareCorps.org](mailto:techsupport@CommunityCareCorps.org).
- 7.1.3. No individual programmatic assistance or support will be provided before or during the application submission window other than that provided during the informational webinar. If any programmatic support is required during the application process, please refer to the [FAQ section](#) of the Community Care Corps website. Attending the informational webinar is highly recommended. This webinar will be recorded and posted on the Community Care Corps website.
- 7.1.4. Ensure all acronyms are written out the first time they are used.
- 7.1.5. The proposal consists of the following elements:
  - 7.1.5.1. Proposal Narrative.
  - 7.1.5.2. Application Templates include:
    - 7.1.5.2.1. Budget Form (applicants must use the form provided);
    - 7.1.5.2.2. Budget Narrative (applicants must use the form provided);
    - 7.1.5.2.3. Work Plan (applicants must use the form provided).
  - 7.1.5.3. Financial Documentation:
    - 7.1.5.3.1. Full organization budget for current fiscal year;
    - 7.1.5.3.2. Full organization budget for most recent completed fiscal year;
    - 7.1.5.3.3. Independent audit letter, including any management letter issued;
    - 7.1.5.3.4. Most recent full organization audit by an outside independent auditor. A financial review by an outside independent auditor is acceptable if the organization does not engage in a financial audit;
    - 7.1.5.3.5. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable;
    - 7.1.5.3.6. If your organization does not engage in an independent financial audit or review, you may provide your Form 990 and internally prepared financial statements for the most recent fiscal year. These should be accompanied by a letter from your CFO or board chair explaining why the organization does not engage in an independent financial audit or review;
    - 7.1.5.3.7. A copy of the organization's current IRS tax-exempt status determination letter or most current Form 990, OR Certificate of Incorporation or equivalent

document for qualified religious organizations not required to file Forms 990 and 1023. If not applicable, a letter from the applicant's CFO or equivalent stating such and why;

- 7.1.5.3.8. Unique Entity ID number and SAM registration confirmation, or verification that registration is in progress;
- 7.1.5.3.9. Documentation of the organization's indirect cost agreement with the government, if applicable;
- 7.1.5.3.10. Completed and certified Financial Management Survey. Certification of this document is achieved when the preparer provides a digital signature on the document attesting that the information provided is correct to the best of their knowledge and ability. No other certification, such as notarization is required.

7.1.6. Applicants must also include a 100-word executive summary of the proposed program.

7.1.6.1. Sample executive summary: "Senior Services of Example County will provide a friendly visitor program, meal preparation, and lawn mowing services to people over age 70 living alone. The goal is to decrease self-reported social isolation and increase reported ability to live independently. We will be using 50 current volunteers for the friendly visitor program and recruit and train 75 new volunteers for the meal preparation and lawn mowing services. We believe adding these services to our existing efforts to reduce social isolation will increase the impact and lead to greater confidence in the ability of older adults to age in place."

## **8. Guidance for Completing the Application and Templates**

### **8.1. Proposal (180 total points)**

#### **8.1.1. Community Background (10 points)**

- 8.1.1.1. Describe the organization's history of serving the community and the current services offered. (300 words) (5 points)
- 8.1.1.2. Describe the unmet needs of the community that you intend to address. Please provide data as localized as possible. (300 words) (5 points)

#### **8.1.2. Program Overview and Details (70 points)**

- 8.1.2.1. Indicate if you are developing a model new to your organization, or expanding, or refining an existing program your organization is currently implementing based on section 1.2.4. (0 points)
- 8.1.2.2. Present a descriptive summary of the proposed local model. This should include program goals; a detailed description of Model Development, Model Expansion or Model Refinement per section 1.2.4.; and a description of the types and content of the volunteer assistance that will be provided. Goals and

- objectives should match the work plan. (1000 words) (20 points)
- 8.1.2.3. Describe how your local model is incorporating the key focus areas identified in section 1.2.3. (300 words) (10 points)
  - 8.1.2.4. In the table provided in the application portal, indicate the number of individuals your organization intends to assist under your proposal and the number of volunteers who will be providing that assistance. These numbers should include new participants and volunteers and, if appropriate, participants and volunteers already engaged in your program as long as they will continue to receive and provide nonmedical assistance in accordance with your grant proposal within the funding period. Community Care Corps wants this number to be reflective of the total number of older adults, persons with disabilities age 18 and older, family caregivers and volunteers your organization plans to include in this grant period. Provide rationale for these projected numbers. (300 words) (5 points).
  - 8.1.2.5. Identify any underserved population(s) to be served by the proposed local model as defined by [Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government, dated January 20, 2021](#). Describe your rationale (citing relevant data) for selecting the special target population(s), how you will engage these special target population(s), and which organizations (if applicable) you will collaborate with to reach the proposed population(s). (350 words) (10 points)
  - 8.1.2.6. Explain the anticipated outcomes from the local model (such as: mental well-being, confidence in sustaining in-home care, ability to live independently, caregiver stress, etc.). This should support the goals and objectives provided in the work plan. (100 words) (5 points)
  - 8.1.2.7. Explain how the services provided through your local model are innovative or different. (200 words) (5 points)
  - 8.1.2.8. Explain the organization's strategy to include community input in the development, expansion or refinement, and evaluation of your proposed local model. (100 words) (5 points)
  - 8.1.2.9. Explain the organization's capacity to successfully carry out the proposal. This should include, but is not limited to, staffing, administrative support, volunteers, technology, financial resource management, other infrastructure, and ability to comply with grant requirements. Specify which staff members will be responsible for carrying out what grant-related responsibilities. If you plan to hire any additional staff, please specify how many. (200 words) (10 points)
  - 8.1.2.10. *\*This question is only required if the applicant proposes to work with other organizations or community partnerships.\**  
Indicate the roles and responsibilities of each partner and how,

together, these roles provide a cohesive strategy for implementing the local model. Explain how the use of funds will be overseen. Indicate whether the other partners have already agreed to the partnership. (300 words) (0 points)

8.1.3. Sustainability and Dissemination (15 points)

8.1.3.1. Describe the organization's plan to, and the feasibility of meeting the required minimum match. (100 words) (5 points)

8.1.3.2. Explain the organization's strategy to address sustainability for the local model after the grant period ends. Stronger sustainability plans will receive preference in the review process, but proposals without strong sustainability plans will not be disqualified solely on that factor. (200 words) (5 points)

8.1.3.3. Explain how the organization will prevent negative impacts on recipients of volunteer assistance after the grant period ends should no other funding become available. (100 words) (5 points)

8.1.4. Reporting and Evaluation

8.1.4.1. Your organization must agree to facilitate the collection of and provide data for a minimum **period of 12 months** on the items listed in section 5.2. using the forms and technical assistance provided. Opportunities for participation include learning collaboratives, site visits and monthly calls as outlined in section 5.

8.1.4.2. Your organization must agree to participate in the collection of effective elements, conceptual approaches used in model development and implementation that improve outcomes, reduce barriers and are replicable for future dissemination by Community Care Corps. Opportunities for participation in the collection of effective elements include learning collaboratives, site visits and monthly calls as outlined in section 5.

8.2. Budget Form (25 points)

*Note: This guidance is best utilized when read in combination with the provided Budget template.*

8.2.1. **Submit a proposed budget using the Budget Form template provided. No other forms, formats or alterations will be accepted. Only applications with budgets submitted on this Excel template will be reviewed.** List the amount of federal funds requested, the applicant's minimum match, and the total program budget.

8.2.1.1. This budget must encompass a period of 18 months.

8.2.2. Budget Form Scoring: (20 points)

8.2.2.1. A budget for this grant program must have the following characteristics:

8.2.2.1.1. Expenses and revenue equal to each other;

8.2.2.1.2. Requested amount and line items match the budget



- narrative;
- 8.2.2.1.3. Budget is reasonable to meet the goals proposed in the application and is in compliance with the [Uniform Guidance \(45 CFR Part 75\)](#).
- 8.2.3. Applicant's budget should include:
  - 8.2.3.1. Program Revenue:
    - 8.2.3.1.1. Federal Funds Requested for this program. This includes only the amount of federal funding you are requesting for your program. On the Budget Form, this amount should equal the grand total of the Federal Share expenses;
    - 8.2.3.1.2. Non-Federal Share, in-kind and cash match contributions, by source (as indicated in 4.3.4. above).
  - 8.2.3.2. Program Expenses:
    - 8.2.3.2.1. All program personnel allocated to this grant program (full or part-time) directly employed by organization. Provide the percent of full-time equivalent employee (FTE), the annual salary, and the budgeted amount;
    - 8.2.3.2.2. Fringe benefits;
    - 8.2.3.2.3. Other direct program expenses necessary for the success of this grant program. See Budget Form template for more information and examples;
    - 8.2.3.2.4. Applicants should refer to the Uniform Guidance, or [45 CFR Part 75](#), specifically Subpart E, for guidance on allowability, reasonableness and allocability of specific expenses when preparing the budget.
  - 8.2.3.3. Indirect Costs:
    - 8.2.3.3.1. If the applicant has a federally approved indirect cost rate agreement, the applicant may use its approved rate. If the applicant does not have a federally approved indirect cost rate agreement, the applicant may include up to 15% of direct program costs as indirect costs. If you had a federally approved indirect cost rate but it has expired, you may use 15% of Total Direct Costs as Indirect expense. Total direct and indirect costs may not exceed the application cap of \$200,000;
    - 8.2.3.3.2. Examples of indirect costs are rental costs for office space (excluding the cost of short-term rentals for event space for program-related activities), costs of operating and maintaining facilities, salaries and expenses of executive officers and/or administrative personnel, accounting, office equipment and office supplies;
    - 8.2.3.3.3. Cellular phones or computers that are specifically dedicated to the program **may be** included as a part

of your direct cost budget.

### 8.3. Budget Narrative (25 points)

8.3.1. The budget narrative explains the rationale of the organization's proposed budget, including program revenue sources and program expenses. Use the budget narrative to explain the numbers and decisions behind the proposed budget. **All applicants are required to use the provided Budget Narrative template. No other forms, formats or alterations will be accepted. Only applications with budget narratives submitted on this writable pdf template will be reviewed.**

#### 8.3.2. Budget Narrative Scoring

8.3.2.1. The budget narrative for this grant should include the following characteristics:

- 8.3.2.1.1. A feasible and realistic explanation of funding sources for each financial contribution indicated on the budget;
- 8.3.2.1.2. All information about program staffing, including a listing by position, all full or part-time employees dedicated to this program, and whether these constitute existing or new staff for the organization;
- 8.3.2.1.3. A list and explanation of the costs associated with activities, events, classes, and meetings;
- 8.3.2.1.4. The program costs in the budget should correlate with the program tasks in the Work Plan.

#### 8.3.3. Program Revenue

8.3.3.1. Federal Funds Requested: This includes only the amount of federal funding you are requesting for your program.

8.3.3.2. Non-Federal - Cash Contributions (Match): Include an explanation of each funding source and whether that funding is secured, in process, or anticipated.

8.3.3.3. Non-Federal - In-Kind Contributions (Match): List all in-kind/non-monetary contributions the organization anticipates receiving and using for this program. Include a breakdown of the fair market monetary value. List the source of the contribution (i.e., an individual, organization, etc.). For contributions of personnel, please include salary/wage levels for each staff member and/or consultant. In addition, provide the cost of rental space, if applicable. Clarify whether each contribution is secured, in process, or anticipated. If a reasonable and documentable fair market value of volunteer services is not easily determined, volunteer hours may be calculated with the following equation: number of hours worked multiplied by the [independent sector rate](#).

#### 8.3.4. Program Expenses

8.3.4.1. Personnel: List all personnel supported by the grant and employed by the organization. Type 'current' or 'future' to differentiate between personnel who are currently employed by

the organization and future hires. Enter the percent of full-time equivalent employee (FTE), the annual salary, and the budgeted amount.

- 8.3.4.2. Program Activities/Direct Program Costs: Explain the program activities expenses included in the Budget Form, including how you arrived at the amounts (unit cost x number of items for XX of participants served, for example). Please include the number of events, people, and/or items where applicable. Liability insurance coverage for volunteers is required. If the applicant does not currently maintain liability insurance coverage for volunteers, the applicant may include the cost of coverage as a part of their budget. Applicants who are funded will be required to provide proof of such coverage.
- 8.3.4.3. Indirect Costs: Explain the types of costs included in your indirect cost calculation. Please indicate if the organization has an indirect cost agreement with the federal government. If applicable, the indirect cost agreement should be uploaded in the Financial Documentation section of the application portal.

#### 8.4. Work Plan (35 points)

*Note: This guidance is best utilized when read in combination with the provided Work Plan template. All applicants are required to use the provided Work Plan template. No other forms, formats or alterations will be accepted. Only applications with a work plan submitted on this Excel template will be reviewed.*

##### 8.4.1. Work Plan Definitions:

- 8.4.1.1. Goal: An aim or desired result of the local model;
- 8.4.1.2. Outcome: The measurable change or benefit resulting from the local model;
- 8.4.1.3. Output: The direct products of the local model's activities, services and deliverables;
- 8.4.1.4. Major Objective: Primary desired result of a task;
- 8.4.1.5. Key Task: A focused and specific task often required to be finished within a certain time that is critical for reaching the major objective.

##### 8.4.2. Work Plan Scoring:

- 8.4.2.1. The work plan for this grant should include the following characteristics:
  - 8.4.2.1.1. A clear, comprehensive plan inclusive of all 18 months of project activity;
  - 8.4.2.1.2. Clear program goals and objectives which are consistent with the narrative provided;
  - 8.4.2.1.3. Measurable and desirable program outcomes which are likely to be achieved following the proposed work plan;
  - 8.4.2.1.4. Proposed key tasks link directly to the stated goals and objectives;

- 8.4.2.1.5. Timeframes for the accomplishment of tasks are sensible and feasible;
  - 8.4.2.1.6. Roles and responsibilities of project staff and other key partners are clearly defined and link to specific objectives and tasks;
  - 8.4.2.1.7. The amount of work required for each staff member is feasible and realistic.
- 8.4.3. Using the template provided, create a Work Plan for each local model goal:
- 8.4.3.1. Complete the ALL GOALS sheet of the workbook, listing the name of the organization, date the work plan was developed and all the program goals. Applications may include up to five (5) goals;
  - 8.4.3.2. On the ALL GOALS sheet, create a key listing each staff position entered in the work plan and its associated abbreviation (e.g., SVP = Senior Vice President);
  - 8.4.3.3. Complete a separate work plan sheet for each goal. Delete any unused sheets;
  - 8.4.3.4. List the goal, measurable outcomes, and measurable outputs at the top of each Work Plan Goal sheet;
  - 8.4.3.5. List the major objectives for each goal and the main tasks under the objectives. Add rows for tasks and objectives, as necessary. Delete rows that are not necessary. Utilize only the number of objectives needed to achieve the goal. Do not exceed six (6) major objectives;
  - 8.4.3.6. In the column titled "Lead Person(s)," list the job title(s) of the Individual(s) who will take the lead on accomplishing the task;
  - 8.4.3.7. Indicate the anticipated completion dates for the key tasks by placing an "X" in the box(es) that correspond with the month(s) when the tasks will be addressed.
- 8.5. Application Screening Criteria  
All applications will be screened to ensure that application requirements have been met. **Applications that fail to meet the screening criteria described below will not be reviewed and will receive no further consideration.**
- 8.5.1. For an application to be reviewed, it must meet the following requirements:
    - 8.5.1.1. Applications **must** be submitted electronically via [CommunityCareCorps.org](https://CommunityCareCorps.org) by **5:00 p.m. Eastern Time, December 11, 2024**;
    - 8.5.1.2. Applicants **must** complete the budget form, budget narrative, and work plan found in the application portal, in accordance with sections 7 and 8 of the RFP. All forms must be completed using the original format of the provided templates. **No other forms, formats or alterations will be accepted**;
    - 8.5.1.3. The budget **must** include a minimum match of 25% of the total program budget. You **must** use the following calculation to determine the minimum 25% match value:

**Federal Funds Requested / 3 = 25% Minimum Match Amount.** Applicants who do not use this calculation to determine match will not be moved forward for consideration. The budget form and budget narrative also contain this formula to assist in determining the minimum 25% match requirement. Refer to section 4.3.1.;

- 8.5.1.4. Applications **must** include an executive summary of the proposed program that does not exceed 100 words, in accordance with section 7.1.6.