



**Request for Proposals and Program Guidelines 2021:**  
*Innovative Local Models to Provide Volunteer Non-Medical Assistance to  
Older Americans, Adults with disabilities, and Family Caregivers*

**Local Models Program**

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For more information, please contact:

Sara Paige | Project Manager | [Info@CommunityCareCorps.org](mailto:Info@CommunityCareCorps.org)

# Contents

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1.	<b>Grant Overview</b>	Page 3
	1.1. Background	
	1.2. Request for Proposals	
2.	<b>Application Eligibility and Logistics</b>	Page 3
	2.1. Eligibility	
	2.2. Funding Limitations and Requirements	
	2.3. Grant Timeline	
3.	<b>Eligible Populations and Volunteer Services</b>	Page 5
	3.1. Eligible Populations	
	3.2. Volunteer Services	
4.	<b>Funding</b>	Page 6
	4.1. Award Amounts	
	4.2. Grant Period	
	4.3. Match Requirements	
5.	<b>Expectations and Compliance</b>	Page 7
	5.1. Expectations	
	5.2. Reporting Requirements	
	5.3. Evaluation Efforts	
	5.4. ACL Compliance	
	5.5. DUNS and SAM Registration	
6.	<b>Review Process and Criteria</b>	Page 9
	6.1. Review Process	
	6.2. Review Criteria	
7.	<b>Application</b>	Page 10
	7.1. Intent to Apply	
	7.2. Application	
8.	<b>Guidance for Completing the Application and Templates (new applicants)</b>	Page 11
	8.1. Proposal	
	8.2. Budget	
	8.3. Budget Narrative	
	8.4. Work Plan	
	8.5. Application Screening Criteria	
9.	<b>Guidance for Completing the Application and Templates (reapplying grantees)</b>	Page 17
	9.1. Proposal	
	9.2. Budget	
	9.3. Budget Narrative	
	9.4. Work Plan	
	9.5. Application Screening Criteria	

## **1. Grant Overview**

### **1.1. Background**

- 1.1.1. The Oasis Institute has received a five-year cooperative agreement from the U.S. Administration for Community Living/Administration on Aging (ACL/AoA) to implement the National Volunteer Care Corps. This program, now called *Community Care Corps*, is administered by Oasis in cooperation with Caregiver Action Network and the National Association for Area Agencies on Aging (referred to as “Administrators” in this Request for Proposals). Altarum, a nonprofit research and consulting organization, will also be an integral part of consulting and advising the Administrators and the program.
- 1.1.2. Through an independent review committee and competitive grant-making process, the Administrators will distribute these funds to foster innovative local models to provide volunteer non-medical assistance to older adults, adults with disabilities, and family caregivers; and to evaluate the effectiveness of those models in different communities nationally.

### **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 adults with disabilities with non-medical care in order to maintain their independence.
- 1.2.2. This is the 2021-2022 Request for Proposals (RFP) cycle under the five-year federal cooperative agreement.
- 1.2.3. The Administrators will only commit to fund local models for one grant cycle (a grant of 12 months). Currently, federal funds are not secured beyond one year. Therefore, applicants should consider this a single cycle grant. Grantees should provide plans for sustainability. If funding is available for subsequent years, previously awarded grantees may apply for a second-year grant through a similar competitive process (there are no automatic second-year grants).

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

### **2.1. Eligibility**

- 2.1.1 A range of types of entities are encouraged to apply. We want to fund local models that represent a diverse cross section of the nation reflective of geography, urban/rural/frontier and Tribal communities, underserved and limited English-speaking populations, communities with limited support programs, etc.
- 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 adults with disabilities;
- 2.1.2.13. Entities with expertise in the delivery of services and supports to older adults, adults with disabilities, and family caregivers.
- 2.1.3. More than one organization may partner in a single application, but one organization must be designated as the lead applicant, recipient and manager of award funds. The lead applicant will be required to submit letters from the partnering organizations confirming their participation in the proposed local model.
- 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, unless such equipment is demonstrated to be necessary to carry out an activity otherwise 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 DUNS number 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.
  - 2.2.4. 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.

### 2.3. Grant Timeline

#### 2.3.1. Application Process Overview:

2.3.1.1. **Informational Call:** One optional informational webinar will be held for interested parties on **May 26, 2021 at 11:00 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. Any question that is not answered during the Informational Webinar or on the website FAQs page can be sent to [info@communitycarecorps.org](mailto:info@communitycarecorps.org);

2.3.1.3. Webinar log-in information can be found at [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 July 9, 2021. Please periodically check [CommunityCareCorps.org](#) for updates):

2.3.2.1. **May 10, 2021:** RFP available for view at [CommunityCareCorps.org](#);

2.3.2.2. **June 14, 2021:** Applications may be submitted;

2.3.2.3. **July 9, 2021 at 5:00 pm ET:** Applications due;

2.3.2.4. **September 7, 2021:** Anticipated date for award announcements.

2.3.2.5. **October 1, 2021-September 30, 2022:** Anticipated grant cycle.

### 3. Eligible Populations and Volunteer Services

3.1. Eligible populations: Local model volunteer programs must serve 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 family member, foster parent, friend, neighbor or other unpaid adult who provides in-home monitoring, management, supervision, or treatment of a child or adult with a need, such as a disease, disability, or the frailties of old age;

3.1.3.2. Volunteer services provided to family caregivers are intended to support their role as caregivers.

3.2. Volunteer Services

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 non-medical services;
- 3.2.1.4. Provide services in coordination with a family caregiver, if applicable;
- 3.2.1.5. Recruit and train volunteers who are age 18 and older;
- 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](https://www.communitycarecorps.org) for additional information. The Administrators will hold a technical assistance webinar about Background checks requirements for all successful applicants.
- 3.2.1.7. Ensure that any personal identifying information (PII) from volunteers or from those receiving volunteer services is kept secure.
- 3.2.2. Local models can offer to provide a wide range of volunteer services.
- 3.2.3. Volunteer services **MUST** be non-medical services. Volunteer services **MUST NOT** include any form of health care service including personal care services.
- 3.2.4. Applicants are encouraged to be innovative in their approaches in determining what volunteer services would be particularly useful to address unmet needs of the eligible populations they intend to serve. Applicants are encouraged to consider health equity and social determinants of health. What is innovative for one organization might not be innovative for another.

#### 4. **Funding**

##### 4.1. Award Amounts

- 4.1.1. The Administrators will award grants ranging in size from **\$30,000 to \$150,000** to applicants who have not previously been awarded funding.
- 4.1.2. Applicants who have previously been granted funding from Community Care Corps, may apply for second-year funding **up to \$100,000 or 100% of the previously awarded amount, whichever is less.**
- 4.1.3. This RFP process will be competitive. Not all applications will receive funding, and those that do may not receive the full amount requested.

##### 4.2. Grant Period

- 4.2.1. The grant period will be for 12 months.
  - 4.2.1.1. Proposed local models do not have to be new projects to an organization. But funds must be used to supplement, not supplant, funding that would otherwise be available for volunteer

activities.

#### 4.3. Match Requirements

4.3.1. All grantees are required to contribute a **minimum match equal to 21% of the total program budget. 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 \$31,899 match, bringing the total program budget to \$151,899. Calculate minimum match as follows:

**Funds Requested / .79 = Total Program Budget – Funds Requested = Minimum match amount**

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 the 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; and

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.

### 5. 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 the technical assistance activities, including:

5.1.2.1. Participation in monthly calls with The Administrators' Community Care Corps Project Manager and others;

5.1.2.2. Participation in a minimum of 4 technical assistance webinars or conference calls per year, devoted to specific topics;

5.1.2.3. Participation in learning collaboratives to share information with other grantees.

5.1.3. Grantees will be subject to site visits either in person or virtual.

5.1.4. 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.

- 5.1.5. Grantees are expected to participate in evaluation efforts as described in Section 5.3, including distributing user-friendly pre- and post- surveys (survey forms will be provided) to all persons receiving volunteer services in the grantee's local model volunteer program and collecting the completed surveys.

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 (form will be provided);
- 5.2.2. Quarterly Evidence of Match Form (form will be provided);
- 5.2.3. Quarterly Outputs Report (within the grantee portal);
- 5.2.4. Outcomes Reporting using Care Recipient, Family Caregiver, and Volunteer Pre- and Post-Surveys captured, at a minimum, at start and end of service (forms will be provided);
- 5.2.5. Semi Annual Narrative Report (format will be provided);
- 5.2.6. End of program narrative summary (format will be provided);
- 5.2.7. A minimum of two (2) videos or written stories featuring individuals from the target population being served. Community Care Corps will provide the video platform.

5.3. Evaluation Efforts

- 5.3.1. An important aim of Community Care Corps is to evaluate the effectiveness of local models.

- 5.3.2. Grantees will be required to collect and report **12 months of data** that aids in evaluation.

- 5.3.3. Grantees will be required to report certain output data within the grantee portal such as: unique number of older adults assisted with nonmedical care; unique number of adults with disabilities assisted with non-medical care; unique number of family caregivers assisted with non-medical care; types of non-medical volunteer services provided (scope of services);

- 5.3.4. Grantees will be required to distribute a survey to be filled out by individual family caregivers, older adults, and adults with disabilities receiving volunteer services (forms will be provided).

- 5.3.4.1. These surveys will capture self-reported data on 7 outcome measures: functional status; mental well-being; confidence in sustaining in-home care; ability to live independently; caregiver stress; program relevance; and program satisfaction.

- 5.3.5. Grantees will be required to survey their volunteers (forms will be provided).

- 5.3.5.1. These surveys will capture data on outcome measures such as commitment to the organization and satisfaction with volunteering.

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 III of the [Older Americans Act](#) (OAA) (42 U.S.C. 3030), as amended by the Older American 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. DUNS and SAM Registration

5.5.1. All applicants must obtain a Data Universal Numbering System (DUNS) number and register in the Federal System for Award Management (SAM). Proof of registration must be supplied to The Administrators before funds will be disbursed. Since registration may take up to one month, it is recommended to begin that process now. Please note that organizations must procure a DUNS number before registering in SAM.

5.5.2. Registering for a DUNS number:

5.5.2.1. If you have not previously registered in DUNS, review all instructions in this [link](#) before you register;

5.5.2.2. DUNS number: A unique number is assigned for each physical location registering. A DUNS number can be requested **free of charge** by visiting [Dun & Bradstreet](#) (D&B) or by calling the dedicated toll-free DUNS number request line at 1-866-705-5711. It typically takes one to two business days to obtain a DUNS number.

5.5.3. SAM registration: The applicant organization is referred to as an “Entity.” Applicants must register to do business with the U.S. Federal Government by completing the registration process in SAM. It is **free of charge** to register and maintain an entity registration record in SAM. Please click [here](#) for more information.

### 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, diversity of organization type, diversity of organization size, target population(s), diversity of population served, geographic region, and type of volunteer services provided to create a diverse pool of grantees required to meet the overall goals of the Community Care Corps program.

6.1.3. **Not all successful applicants will receive the full amount requested.**

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. Applicants who have not previously received funding from Community Care Corps see Section 8. Applicants previously granted funding from Community Care Corps who are applying for second-year funding see Section 9).

7. Application

7.1. Application

7.1.1. Applications will be submitted through the online portal available at [CommunityCareCorps.org](http://CommunityCareCorps.org) from **June 14, 2021 to no later than 5:00 p.m. ET, July 9 2021**. (See 2.3 above)

7.1.2. If any technical support is required during the application process, please contact [techsupport@CommunityCareCorps.org](mailto:techsupport@CommunityCareCorps.org).

7.1.3. Ensure all acronyms are written out the first time they are used.

7.1.4. The proposal consists of the following elements:

7.1.4.1. Proposal;

7.1.4.2. Three (3) letters of support from community partners or public officials (these will not add points to your organization's score, but are required);

7.1.4.3. Application Templates:

7.1.4.3.1. Budget;

7.1.4.3.2. Budget Narrative;

7.1.4.3.3. Work Plan.

7.1.4.4. Financial Documentation:

7.1.4.4.1. Full organization budget for current fiscal year;

7.1.4.4.2. Full organization budget for most recent completed fiscal year;

7.1.4.4.3. Independent audit letter, including any management letter issued;

7.1.4.4.4. 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;

7.1.4.4.5. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable;

7.1.4.4.6. 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.

- 7.1.4.4.7. 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;
  - 7.1.4.4.8. DUNS number and SAM registration confirmation, or verification that registration is in progress;
  - 7.1.4.4.9. Documentation of the organization’s indirect cost agreement with the government, if applicable.
- 7.1.5. Applicants must also include a 100-word executive summary of the proposed program.
- 7.1.5.1. 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 recruiting and training 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 (Only applicants not previously funded should complete section 8. Current grantees applying for second year funding skip to section 9.)**

**8.1. Proposal (160 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. Please provide data as localized as possible.(300 words) (5 points)

**8.1.2. Program Overview and Details (55 points)**

- 8.1.2.1. Present a descriptive summary of the proposed local model including its goals. Indicate the number of participants the program aims to benefit and if these participants are new or if your organization has served them previously. Explain the rationale and strategy for creating your local model with the selected number of participants. (500 words) (10 points)
- 8.1.2.2. List and describe the type and content of the volunteer services

- that will be provided, including any new services not previously offered by your organization. Please ensure this information is reflected in the Work Plan. (800 words) (10 points)
- 8.1.2.3. Given the demographics of your community, describe your plans to ensure that you are serving older adults, adults with disabilities, and family caregivers that reflect the demographics of your community, such as:
    - 8.1.2.3.1. Cultures, races and ethnicities;
    - 8.1.2.3.2. Religious or spiritual beliefs;
    - 8.1.2.3.3. Gender, including transgender;
    - 8.1.2.3.4. Sexual orientation/identity;
    - 8.1.2.3.5. Socioeconomic status;
    - 8.1.2.3.6. Adults with disabilities;
    - 8.1.2.3.7. Veterans and military families.
 (350 words) (10 points)
  - 8.1.2.4. Explain the expected outcomes from the local model (such as: mental well-being, confidence in sustaining in-home care, ability to live independently, caregiver stress, etc.). (100 words) (5 points)
  - 8.1.2.5. Explain how the services provided through your local model would be innovative or different. Explain how it addresses unmet needs in the community. (200 words) (5 points)
  - 8.1.2.6. Explain the organization's strategy to include community input into the proposed local model. (100 words) (5 points)
  - 8.1.2.7. Explain the organization's capacity to successfully carry out the proposal in terms of 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 recruit any additional staff or volunteers, please specify how many. (200 words) (10 points)
  - 8.1.2.8. *\*This question is only required if 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 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 meet the required minimum match. Explain how the strategy is feasible. (100 words) (5 points)
    - 8.1.3.2. Explain the organization's strategy to work 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 clients 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 **period of 12 months** on the items listed in section 5.2 using the forms and technical assistance provided.

8.2. Budget (20 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 template provided. **Only budgets submitted on this template will be reviewed.** List the amount of funds requested, the applicant's minimum match, and the total program budget. Applicants should add lines for additional costs as needed.

8.2.1.1. This budget should encompass a period of 12 months.

8.2.2. Budget 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; and

8.2.3.1.2. Match Funding 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;

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 template informational Tab 1 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 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 and has never had a federally approved indirect cost rate agreement, the applicant may include up to 10% of direct program costs as indirect costs. If applicant had an indirect cost rate agreement and it has expired, the applicant may **not** include indirect costs as a part of its budget. Total direct and indirect costs may not exceed the application cap of \$150,000 for first-time applicants.

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. Overhead **does not** include cellular phones or computers that are specifically dedicated to the program.

### 8.3. Budget Narrative (30 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 template for their budget narrative.**

#### 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 amount should equal the total federally funded expenses included in your Budget.

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

8.3.3.3. Match - In-Kind Contributions: 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, 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. If applicant does not currently maintain liability insurance coverage for volunteers, the applicant should consider including the cost of coverage as a part of their budget. Applicants who are funded will be required to provide proof of such coverage, if applicable.

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 (30 points)

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

8.4.1. Work Plan Definitions:

8.4.1.1. Goal: An aim or desired result of a program, event, or initiative;

8.4.1.2. Outcome: The measurable change or benefit that results from the program;

8.4.1.3. Major Objective: Primary desired result of a task;

8.4.1.4. 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. Clear program goals;
    - 8.4.2.1.2. Measurable program outcomes;
    - 8.4.2.1.3. Reasonable objectives and tasks;
    - 8.4.2.1.4. Reasonable timeframes;
    - 8.4.2.1.5. Feasible and realistic amount of work required for each staff member.
  - 8.4.3. Using the template provided, create a Work Plan for each program goal:
    - 8.4.3.1. Fill out the first page of the template, listing every goal of the program. Applications may include up to five goals;
    - 8.4.3.2. Complete a separate chart for each goal;
    - 8.4.3.3. List the goal and measurable outcome at the top of the chart;
    - 8.4.3.4. List the major objectives next to the numbered row, and the main tasks under the objectives. Add rows for tasks and objectives, as necessary. Delete rows that are not necessary;
    - 8.4.3.5. In the column titled "Lead Person(s)," note the job title of the Individuals who will take the lead on accomplishing the task;
    - 8.4.3.6. Indicate the anticipated completion dates for the major objectives by filling the box(es) in black that correspond with the month(s) when the tasks will be addressed;
    - 8.4.3.7. Create a key, listing each staff position entered in the Work Plan and its associated abbreviation (e.g., SVP = Senior Vice President).

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, July 9, 2021**;
  - 8.5.1.2. Applicants must complete all templates found in the application portal, in accordance with sections 7 and 8 of the RFP including but limited to the budget form, budget narrative, and work plan. Applicants are encouraged to ensure that the uploaded templates are fully completed prior to submitting a finished application. The budget must include a minimum match of 21% of the total program budget. Refer to 4.3.1 above for a sample calculation;
  - 8.5.1.3. Applications must include an executive summary of the proposed program that does not exceed 100 words, in accordance with section 7.2.5.
  - 8.5.1.4. Applications must include three (3) letters of support from



community partners or public officials.

9. **Guidance for Completing the Application and Templates (Only Current Grantees requesting second year funding should complete section 9.)**

9.1 **Proposal (180 total points)**

9.1.1. Community Background (10 points)

9.1.1.1. Describe the unmet needs in your community that your local model addressed in the previous grant cycle and any additional or newly identified needs that will be addressed in this proposal for the 2021-2022 grant cycle. (300 words) (10 points)

9.1.2. Program Overview and Details (60 points)

9.1.2.1. Describe the services offered by your 2020-2021 local model including any modifications made during the grant cycle, and the impact your local model had on the community. (700 words) (10 points)

9.1.2.2. Describe the lessons learned from the implementation and delivery of service of your 2020-2021 local model and what actions will be taken to address those lessons. (300 words) (10 points)

9.1.2.3. Present a descriptive summary of the proposed local model for the 2021-2022 grant cycle including its goals and objectives and how those relate to your 2020-2021 local model. (400 words) (10 points)

9.1.2.4. List and describe the type and content of the volunteer services that will be provided, including the implementation and delivery of these services. Please ensure this information is reflected in the Work Plan. (800 words) (10 points)

9.1.2.5. Indicate the number of older adults, adults with disabilities, and family caregivers your local model aims to benefit and if these individuals are new or existing to your local model. (5 points)

9.1.2.6. Given the demographics of your community, describe your plans to ensure that you are serving older adults, adults with disabilities, and family caregivers that reflect the demographics of your community, such as:

9.1.2.6.1. Cultures, races and ethnicities;

9.1.2.6.2. Religious or spiritual beliefs;

9.1.2.6.3. Gender, including transgender;

9.1.2.6.4. Sexual orientation/identity;

9.1.2.6.5. Socioeconomic status;

9.1.2.6.6. Adults with disabilities;

9.1.2.6.7. Veterans and military families.

(350 words) (10 points)

9.1.2.7. Explain how the services provided through your local model are innovative. (200 words) (5 points)

9.1.2.8. *\*This question is only required if 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 use of funds will be overseen. Indicate whether the other partners have already agreed to the partnership. (300 words) (0 points)

9.1.3. Sustainability and Replication (30 points)

9.1.3.1. Explain the organization's strategy to work 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. (300 words) (10 points)

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

9.1.3.3. One goal of Community Care Corps is to identify local models that could be replicated in other communities. Describe how your local model could be implemented in other communities across the country. (700 words) (15 points)

9.1.4. Reporting and Evaluation

9.1.4.1. Your organization must agree to facilitate the collection of and provide data for a **period of 12 months** on the items listed in section 5.2 using the forms and technical assistance provided.

9.2. Budget (20 points)

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

9.2.1. Submit a proposed budget using the template provided. **Only budgets submitted on this template will be reviewed.** List the amount of funds requested, the applicant's minimum match, and the total program budget. Applicants should add lines for additional costs as needed.

9.2.1.1. This budget should encompass a period of 12 months.

9.2.2. Budget Scoring: (20 points)

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

9.2.2.1.1. Expenses and revenue equal to each other;

9.2.2.1.2. Requested amount and line items match the budget narrative;

9.2.2.1.3. Budget is reasonable to meet the goals proposed in the application and is in compliance with the Uniform Guidance, or [45 CFR Part 75](#).

9.2.3. Applicant's budget should include:

9.2.3.1. Program Revenue:

9.2.3.1.1. Federal Funds Requested for this program; and

9.2.3.1.2. Match Funding by Source (as indicated in 4.3.4 above).

9.2.3.2. Program Expenses:

- 9.2.3.2.1. All program personnel allocated to this grant program (full or part-time) directly employed by organization;
- 9.2.3.2.2. Fringe benefits;
- 9.2.3.2.3. Other direct program expenses necessary for the success of this grant program. See Budget template informational Tab 1 for more information and examples.
- 9.2.3.2.4. 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.

9.2.3.3. Indirect Costs:

- 9.2.3.3.1. If 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 and has never had a federally approved indirect cost rate agreement, the applicant may include up to 10% of direct program costs as indirect costs. If applicant had an indirect cost rate agreement and it has expired, the applicant may **not** include indirect costs as a part of its budget. Total direct and indirect costs may not exceed the application cap of up to \$100,000 or 100% of the previously awarded amount, whichever is less.
- 9.2.3.3.2. 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.
- 9.2.3.3.3. Overhead **does not** include cellular phones or computers that are specifically dedicated to the program.

9.3. Budget Narrative (30 points)

9.3.1 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 template for their budget narrative.**

9.3.2. Budget Narrative Scoring

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

- 9.3.2.1.1. A feasible and realistic explanation of funding

sources for each financial contribution indicated on the budget;

- 9.3.2.1.2. 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;
- 9.3.2.1.3. A list and explanation of the costs associated with activities, events, classes, and meetings;
- 9.3.2.1.4. The program costs in the budget should correlate with the program tasks in the Work Plan.

### 9.3.3. Program Revenue

- 9.3.3.1. Federal Funds Requested: this amount should equal the total federally funded expenses included in your Budget.
- 9.3.3.2. Match - Cash Contributions: Include an explanation of each funding source and whether that funding is secured, in process, or anticipated.
- 9.3.3.3. Match - In-Kind Contributions: 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](#).

### 9.3.4. Program Expenses

- 9.3.4.1. 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.
- 9.3.4.2. Program Activities/Direct Program Costs: Explain the program activities expenses included in the Budget, 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. If applicant does not currently maintain liability insurance coverage for volunteers, the applicant should consider including the cost of coverage as a part of their budget. Applicants who are funded will be required to provide proof of such coverage, if applicable.
- 9.3.4.3. 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.

#### 9.4 Work Plan (30 points)

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

##### 9.4.1. Work Plan Definitions:

- 9.4.1.1. Goal: An aim or desired result of a program, event, or initiative;
- 9.4.1.2. Outcome: The measurable change or benefit that results from the program;
- 9.4.1.3. Major Objective: Primary desired result of a task;
- 9.4.1.4. Key Task: A focused and specific task often required to be finished within a certain time that is critical for reaching the major objective.

##### 9.4.2. Work Plan Scoring:

- 9.4.2.1. The work plan for this grant should include the following characteristics:
  - 9.4.2.1.1. Clear program goals;
  - 9.4.2.1.2. Measurable program outcomes;
  - 9.4.2.1.3. Reasonable objectives and tasks;
  - 9.4.2.1.4. Reasonable timeframes;
  - 9.4.2.1.5. Feasible and realistic amount of work required for each staff member.

##### 9.4.3. Using the template provided, create a Work Plan for each program goal:

- 9.4.3.1. Fill out the first page of the template, listing every goal of the program;
- 9.4.3.2. Complete a separate chart for each goal;
- 9.4.3.3. List the goal and measurable outcome at the top of the chart;
- 9.4.3.4. List the major objectives next to the numbered row, and the main tasks under the objectives. Add rows for tasks and objectives, as necessary. Delete rows that are not necessary;
- 9.4.3.5. In the column titled "Lead Person(s)," note the job title of the Individuals who will take the lead on accomplishing the task;
- 9.4.3.6. Indicate the anticipated completion dates for the major objectives by filling the box(es) in black that correspond with the month(s) when the tasks will be addressed;
- 9.4.3.7. Create a key, listing each staff position entered in the Work Plan and its associated abbreviation (e.g., SVP = Senior Vice President).

#### 9.5 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.

- 9.5.1. For an application to be reviewed, it must meet the following requirements:

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- 9.5.1.2. Applicants must complete all templates found in the application portal, in accordance with sections 7 and 9 of the RFP including but not limited to the budget form, budget narrative, and work plan. Applicants are encouraged to ensure that the uploaded templates are fully completed prior to submitting a finished application. The budget must include a minimum match of 21% of the total program budget. Refer to 4.3.1 above for a sample calculation;
- 9.5.1.3. Applications must include an executive summary of the proposed program that does not exceed 100 words, in accordance with section 7.2.5.
- 9.5.1.4. Applications must include three (3) letters of support from community partners or public officials.