



## *OAA - TITLE III-E*

### *Respite Homemaker Services*

#### *Application*

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May 5, 2023

### **Application for Older Americans Act Services**

Senior Services is accepting applications for support of Older Americans Act Services during FY 2024, (October 1, 2023 - September 30, 2024). Public and private non-profit agencies, profit making organizations and municipalities are eligible to apply. The deadline for submitting completed applications is Friday, June 16, 2023, at close of business day, 4:30 p.m.

Enclosed for your completion is an application kit. Different services require different forms. Please make sure you complete the proper application.

Additional information and technical assistance is available from Senior Services during your proposal development process by calling me at (757) 222-4511. **The proposer's conference will be held on Tuesday, June 6, 2023 at Senior Services conference room at 2551 Eltham Avenue from 9:00 a.m. - 11:00 a.m.**

Applicants will be notified by Senior Services of their decision to accept or reject a service proposal on or before August 18, 2023.

We look forward to receiving your application.

*Brigid Z. Miller*

Chief Financial Officer

Senior Services of Southeastern Virginia

**REQUEST FOR APPLICATION**

**Information & Instructions**

Senior Services of Southeastern Virginia is accepting applications for provision of Title III Older Americans Act services under the Area Plan for Aging Services. Funding will be available for the period October 1, 2023 to September 30, 2024 (FY24). Proposals accepted for funding in FY24 may be renegotiated for four additional years.

Applications will be accepted for provision of the following services:

**Adult Day Care**  
**Congregate Meals**  
**Home Delivered Meals**  
**Legal**  
**Meal Preparation**  
**Respite Homemaker**

Programs and services funded are governed by the Older Americans Act of 1965, as amended. Copies of the Older Americans Act of 1965, as amended, and of the most recent Federal Regulations interpreting the Act are available for review. Sample copies of the agreement to be signed between Senior Services and those contractors accepted as vendors are available for review in the Senior Services Administrative offices. If you are interested in reviewing the agreement or Older Americans Act, please contact:

Brigid Miller  
Chief Financial Officer  
2551 Eltham Avenue  
Suite Q  
Norfolk, Virginia 23513  
(757) 222-4511

Providers will be selected based on the evaluation criteria shown below. You may be requested to attend interviews or to otherwise clarify your application and to submit revisions of your proposals as may result from negotiation. This application does not commit Senior Services to award a contract, to pay for any costs incurred in the preparation of the application, to respond to this request or to be bound to procure or contract for these services. The decision to award will be based on, but not limited to the following:

- A. Experience and ability of the agency/organization in delivery of the service;
- B. Expertise in reaching the elderly in greatest economic and social need

- C. Reasonableness of costs;
- D. Amount of resources leveraged for the proposed project;
- E. Adherence to service definition and service delivery parameters;
- F. Availability of funds;
- G. Geographic area(s) to be served;

A proposer's conference will be held on Tuesday, June 6, 2023 at the Senior Services Office on Eltham Avenue from 9:00 a.m. to 11:00 a. m.

Applicants should be notified by Senior Services of its decision to accept or reject a service proposal on or before Friday, August 18, 2023.

**Instructions:**

- A. An original application for each service should be submitted to Senior Services no later than the close of the work day (4:30 p.m.) **June 16, 2023.** Complete the Word formatted application. Attach additional pages where necessary.
- B. Refer to the enclosed descriptions of services defined by the Virginia Department for the Aging.
- C. Each agency must submit a separate application for each service.
- D. Services will commence on October 1, 2023 and the project year ends September 30, 2024. Proposals accepted for funding in FY24 may be renegotiated for four additional years.
- E. Changes may be required in a proposed budget. If this should be the case with your application, your agency will be notified by Senior Services. Submission of a modified application may be requested of the applicant by Senior Services to include a scope of work reflective of the revised budget included in the Senior Services Area Plan. Each applicant organization is given an opportunity to appeal the decision. Such request should be in writing to Steve Zollos, Chief Executive Officer of Senior Services, within ten (10) working days of notification of the decision.
- F. All contracting agencies must be equal opportunity employers and must serve the elderly without regard to race, sex, color, national or ethnic origin, or handicap.
- G. Payment of funds requested from Senior Services will be made on a monthly reimbursement basis upon receipt of Senior Services' monthly financial and programmatic reports.

## **Budget Specifics**

- Proposers must complete the Detailed Budget and may use additional sheets as necessary for supporting budget detail.
- Budget items should reflect only whole-dollar amounts.

Page 4

Column B

Title III-B Federal assistance is available to pay up to 85% of total program costs. At least 15% of total program costs must be born from non-federal sources.

Title III-E Federal assistance is available to pay up to 75% of total program costs. At least 25% of total program costs must be born from non-federal sources.

Page 4

Column  
C-D-E

Non-Federal Match Funds Program Income (revenue generated through contributions from participants), and In-kind resources should equal 15% (Title III-B) or 25%(Title III-E) of the total project costs.

## A. GENERAL INFORMATION:

1. Applicant Organization Name		2. Proposed Service:	
Address			
City/Zip			
Phone			
3. Type of Proposal:		4. Type of Agency:	
(Check one)    New		(Check one)	
Continuation		Private Incorporated	
		Public Incorporated	
		Profit-Making	
5. Project Period		City or County Government	
From:		Describe:	
To:			
6. Define the Geographic Area			
City-Wide			
County-Wide			
Multi-Jurisdictional			
Neighborhood			
7. Project Director, Supervisor or Coordinator Name			
(a) cash			
(b) In-kind			
10. (a). Program Income:			
(b). Other Funds:			
11. Total Project Cost:			
(8 + 9a + 9b + 10a + 10b)			
12. I am hereby authorized to submit this proposal on behalf of:			
SIGNATURE			
DATE SUBMITTED			
NAME OF AGENCY			
NAME & TITLE OF OFFICIAL			

**Senior Services of Southeastern Virginia  
FY19 OAA  
APPLICATION FOR DELIVERY OF SERVICES TO THE ELDERLY**

**B. SERVICES TO BE PROVIDED**

*Where applicable, please provide your answers on separate paper.*

13. a.) Briefly describe the geographic area to be served. Include unique community characteristics, which would help or hinder the delivery of the proposed service.

- b.) Describe the elderly population of the area. Number of persons:

\_\_\_\_\_ 60 Years of age & Over  
\_\_\_\_\_ 75 Years of age & Over  
\_\_\_\_\_ Elderly persons living alone  
\_\_\_\_\_ Elderly who are below poverty level  
\_\_\_\_\_ Minority elderly (60+)

Source of data: \_\_\_\_\_

14. Service Activity (Specify)

- a.) Describe the need for the service:

- b.) Plan of Action (Include objectives and methods to deliver services):

- c.) Service Objectives (see "Title III Service Standards" to define "units")

- 1.) What are the pertinent "units of service"? ("Unit of Service(s) as defined by VDA" e.g. "hours"; "persons"; "contacts"; "miles" \_\_\_\_\_

- 2.) How many "units of service" will be provided? (give estimate)  
"Total Number of Units to be provided with requested Title III  
OAA funds": e.g. "1,000 hours"; "75 persons"; etc. \_\_\_\_\_

15. Describe the experience of your agency in providing the service, what other services your agency provides to senior citizens and how the proposed service fits into the total program. Include information on any certifications required under the service definition (see attachments - "Title III Service Standards").

16. Indicate all the agencies with whom this service will be coordinated and identify the type of support.

17. TOTAL number of unduplicated persons to be served: \_\_\_\_\_ Total  
Of this total, what percentage will be:

RACE	PERCENTAGE
White or Caucasian Only	
Black / African American Only	
American Indian or Alaskan Native Only	
Asian Only	
Native Hawaiian or Pacific Islander Only	
Hispanic or Latino Origin	



# Senior Serviceso Southeastern Virginia Application for Title III Older Americans Act Services

18. DETAILED BUDGET	85% or Less	15% or More		E. In-kind Income	F. Program Income	G. TOTAL
A. BUDGET CATEGORY	B. Funds from Senior Services	C. Non-Federal Match Funds	D. Other Federal			
Personnel (Indicate % of time devoted to project)						
Fringe Benefit (Itemize)						
Travel (Itemize)						
Equipment (Itemize for value of \$500 or more)						
Other (Itemize)						
TOTAL						

**HOMEMAKER**  
**VIRGINIA DEPARTMENT FOR AGING AND REHABILITATIVE SERVICES (DARS)**  
**SERVICE STANDARD**

**Definition**

Homemaker services provide assistance to persons with the inability to perform one or more of the following activities of daily living: preparing meals, shopping for personal items, managing money, using the telephone or doing light housework.<sup>1</sup>

**Eligible Population**

Homemaker services are targeted to persons 60 years of age or older who are frail, have disabilities, or who are at risk of institutional placement. Priority shall be given to persons who are in the greatest economic or social need and/or residing in rural or geographically isolated areas, with particular attention to low-income minority individuals and individuals with limited English proficiency.<sup>2</sup>

**Service Delivery Elements**

The Area Agency on Aging (AAA) must perform all of the following components of homemaker services:

**Service-Specific Assessment:**

A service-specific assessment using Part A of the Uniform Assessment Instrument shall be performed by the Area Agency on Aging on each potential client to determine whether the individual is eligible for the service, the amount of the individual's service-specific need, and the individual's level of priority for service delivery.

- Federal Poverty should be determined and documented. The Federal Poverty/VDA form may be used.
- Any fee for service charge to the client shall be determined by the applicable sliding fee scale.

**Care Plan:**

A written individualized care plan must be developed by the Area Agency on Aging that identifies the service components to be provided to meet the client's assessed need. The plan must be developed prior to service commencement with involvement from the client or an authorized representative or family member. When "client" is used throughout the standards, it can also mean authorized representative or family member, as deemed appropriate by the agency and/or the client. The client shall be afforded the opportunity to participate in the implementation and evaluation of the plan. The plan may be modified to reflect any change in the client's needs. Each plan must include:

- identified service needs
- services to be delivered by the service provider or other sources
- goals and objectives of service to be provided
- the quantity of service units to be provided

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<sup>1</sup> National Aging Program Information System Reporting Requirements – State Program Report Definitions

<sup>2</sup> Older Americans Act of 1965, as amended 2006, Section 306(a)(4)(A)(i)

#### Service Agreement:

A service agreement shall be completed between the client and the service provider. If the Area Agency on Aging is the service provider, the AAA will complete the service agreement. A copy of the Service Agreement will be maintained at the Area Agency on Aging. The agreement will explain the service arrangement to the client. The client shall receive a copy of the agreement. The agreement shall include:

- services to be provided
- scheduled hours and days of service
- information regarding voluntary contributions
- emergency contacts
- severe weather policy

#### Service Activities:

Service activities provided by the provider agency may include:

- Basic housekeeping and home management skills necessary to ensure safe, sanitary conditions in the client's home, such as dusting, vacuuming, sweeping and mopping. Housekeeping is performed only for the client;
- Instructing client in home management, including maintaining an orderly environment, proper food storage, preparation of shopping lists, meal planning and preparation;
- Shopping assistance with or without client;
- Personal laundry and mending of clothing;
- Client transportation may be provided only when other transportation services are unavailable and for scheduled appointments. Need must be clearly documented. Routine transportation is not permitted.

Client assistance may include:

- Assistance with eating, including set up, opening containers, and cutting food. Feeding is not permitted.
- Assistance with bathing of areas that the client cannot reach. Bed baths or transferring are not permitted.
- Assistance with dressing of ambulatory clients, such as the fastening of clothing on the client. Lifting or putting on braces or other supports is not permitted.
- Assistance with personal grooming, such as combing hair, brushing dentures and shaving with an electric razor. Cutting nails or shaving with a blade is not permitted;
- Supportive assistance with ambulation, such as providing stabilization to the client while walking. Lifting and transferring are not permitted.

#### Service Record:

A service record or log, signed by the client, shall record the date and duration of each time the service is provided. The service record or log shall be maintained at the Area Agency on Aging. Service units must be recorded in the approved DARS electronic data reporting system.

#### Service Reassessment:

A review of the client's need for services, the amount of services provided and the appropriateness of the care plan shall be performed by the Area Agency on Aging when the client's condition or situation changes, but at least annually.

- Federal Poverty Level should be determined and documented. The Federal Poverty/VDA form may be used.
- Any fee for service charge to the client shall be determined by the applicable sliding fee scale.

#### Service Termination Policy:

Homemaker services can be terminated at the discretion of the Area Agency on Aging, the service provider or the client. The client shall receive a copy of the termination policy when service begins. The policy shall have provisions for: appropriate advance notice to client, preferably of ten business days; a service summary, and referrals to other community service programs, as appropriate.

### **Administrative Elements**

#### Area Agency on Aging Staff Qualifications:

- Knowledge: Area Agency on Aging staff should have an awareness of the biological, psychological, and social aspects of aging; an awareness of the impact of disability and illness on aging, and a knowledge of community resources and consumer rights.
- Skills: Area Agency on Aging staff should have skills in establishing and sustaining interpersonal relationships and in problem solving.
- Ability: Area Agency on Aging staff should have the ability to communicate with persons of different socioeconomic backgrounds and to work independently and in groups. Staff should have the ability to determine specific household tasks necessary to improve the environment and living conditions of the client.

#### Job Description:

For each paid position, an Area Agency on Aging shall maintain:

- A current and complete job description which shall cover the scope of a the staff member's duties and responsibilities, and
- A current description of the minimum entry-level standards of performance for each job.

#### Service Provider Staff Qualifications:

- Knowledge: Service provider staff should have an awareness of the biological, psychological, and social aspects of aging; an awareness of the impact of disability and illness on aging, and an awareness of community resources and consumer rights.
- Skills: Service provider staff should have skills in establishing and sustaining interpersonal relationships and in assessing what skills and equipment are essential to performing needed household tasks.
- Ability: Service provider staff should have the ability to perform household tasks needed by the client.

#### Units of Service:

Units of service must be reported in the approved DARS data system for each client receiving the service. Service units can be reported by a client on a daily basis, but not aggregated (summarized) more than beyond one calendar month.

- Hours (All hours spent assessing the need for, arranging and delivering homemaker services for the client.)
- Persons served (unduplicated)

#### Program Reports:

- Aging Monthly Report (AMR) to DARS by the twelfth (12th) of the following month. If the Area Agency on Aging supports the homemaker service, this report must be updated and submitted even if no expenditures or units of service occurred.
- AIM or PeerPlace client level data transmitted to DARS by the last day of the following month.
- A completed and properly maintained electronic/digital Part A of the Uniform Assessment Instrument (UAI) is a mandatory requirement.
- The question "Client in Federal Poverty?" (Answer Yes or No) must be asked and recorded.
- A written Policies and Procedures Manual must be maintained for the service.

#### Consumer Contributions/Program Income:

The Area Agency on Aging shall formally adopt written policies and procedures, approved by the agency's governing board, regarding the collection, disposition, and accounting for program income.<sup>3</sup> There must be a written policy on handling of Client Program Income (CPI) and other gratuities and donations.

#### Cost Sharing:

An Area Agency on Aging is permitted to implement cost sharing for recipients of this service.<sup>4</sup>

#### Voluntary Contributions:

Voluntary contributions shall be allowed and may be solicited for this service, provided that the method of solicitation is non-coercive. Such contributions shall be encouraged for individuals whose self-declared income is at or above 185 percent of the poverty line, at contribution levels based on the actual cost of services.<sup>5</sup>

### **Quality Assurance**

#### Criminal Background Checks:

DARS strongly recommends that the agency and its contractors protect their vulnerable older clients by conducting criminal background checks for staff providing any service when said staff goes to or into a client's home.

<sup>3</sup> 22 VAC 5-20-410, Grants To Area Agencies On Aging, Department for the Aging Regulations, Virginia Administrative Code

<sup>4</sup> Older Americans Act of 1965 as amended 2006, Section 315(a)

<sup>5</sup> Older Americans Act of 1965 as amended 2006, Section 315(b)

Staff training:

Each homemaker service provider agency providing the above mentioned service activities shall comply with the following:

- At hiring, homemakers should receive orientation on agency policies and procedures, community characteristics and resources, and procedures for conducting the allowable activities under this service;
- All homemakers shall have a minimum of 16 hours basic training within the first year of employment; training topics should include, but are not limited to ethics and confidentiality in patient care, home safety precautions, working with diverse populations, and home management.
- Workers should receive a minimum of 8 hours per year of in-service training based on the need for professional growth and upgrading of knowledge, skills, and abilities.

Supervision/Case Review:

- Consultation, supervision and case review shall be available to all staff providing the service.
- The Case Monitor Section for this service must be completed in the approved DARS electronic data system

Program Evaluation:

The Area Agency on Aging should conduct regular and systematic analysis of the persons served and the impact of the service.

- Service providers must be monitored annually. A written copy of the monitoring report must be maintained by the agency.
- Anonymous client surveys shall be conducted annually. A file of annual anonymous client surveys with a summary of the surveys shall be maintained by the agency.

Client Records:

Area Agencies on Aging must maintain specific program records in the approved DARS electronic data system that includes:

- Part A of the Uniform Assessment Instrument
- Federal Poverty Level
- Care Plan
- Service Reassessment, as needed
- Progress Notes
- Consent to Exchange Information Form
- A Caregiver Form, if this service is funded by OAA Title III E.

Area Agencies on Aging are to maintain the following additional client records:

- Service plan/documentation, including any fee charged the client
- Signed Client Bill of Rights/ Appeals Process
- Denial or Termination of Service Notice

## **Homemaker FAQ's**

**1. Are certain activities prohibited to homemaker service providers?**

Yes, providers should consult the Virginia Department for the Aging Service Standards to make sure they are knowledgeable about prohibited activities.

**2. Is training required for homemaker service staff?**

Yes, at hiring, homemakers should receive orientation on agency policies and procedures, community characteristics and resources, and procedures for conducting the allowable activities under this service. All homemakers shall have a minimum of 8 hours per year of inservice training after completing the first year of employment. Training programs that provide certification must comply with the guidelines of the Homecare University.

**3. The VDA Homemaker Service Standard states that homemaker training that provides Certification must comply with training guidelines as established by the National HomeCaring Council. Where can I find information about this organization?**

In 1986, the National Association for Home Care merged with the National Homecaring Council, which became part of the NAHC's related Foundation for Hospice and Home Care. For further information on this organization, please consult its website at [www.nahc.org](http://www.nahc.org).

## **What is In-Kind**

**In~Kind** is a donated specialized service or product that an agency would normally have to purchase.

**In~Kind** is donated money to be used for the purchase of services, supplies or other items normally paid through the Agency

**In~Kind** is specialized volunteered services which would generally be paid from grant funds

**In~Kind** is also known as non-Federal Share, Cost Match and Third Party Contributions.

There are no steadfast rules on what can or cannot be considered as In-Kind. However, there are factors that must be considered when evaluating a service:

- The services represent an integral part of the organization's program (such as physician services at a community clinic)
- The services are required to fulfill part of the organization's ongoing administrative requirements (such as preparation of the organization's Form 990).
- Volunteer services make up a significant part of the organization's total program activities (such as teachers who train other volunteers who will in turn teach others to read).
- Similar services are also purchased from third parties when volunteer services are not available (such as legal services).

If the answer to one of the factors is "Yes," then the situation can be considered as In-Kind. The most important item to remember is "if you are not sure, just ask!"





May 5, 2023

## **PUBLIC NOTICE**

Senior Services of Southeastern Virginia hereby notifies municipalities, public, non-profit and profit-making organizations of their eligibility to submit proposals for the delivery of services to elderly persons in Virginia Planning and Service Area 20 under the Area Plan for Aging Services, which covers the period October 1, 2023, through September 30, 2024.

Proposals will be accepted for the provision of the following services: ADULT DAY CARE, CONGREGATE MEALS, HOME DELIVERED MEALS, LEGAL, MEAL PREPARATION, and RESPITE HOMEMAKER.

Application kits will be available online on Monday, May 8, 2023, on our website at [ssseva.org](http://ssseva.org).

The proposers' conference will be held at the Senior Services office at 2551 Eltham Avenue, Norfolk VA on Tuesday, June 6, 2023, from 9:00 a.m. to 11:00 a.m. The deadline for receipt of completed applications by Senior Services is close of business day, 4:30 p.m., Friday, June 16, 2023.

Successful candidates may have their initial award funded for up to an additional four fiscal years.

Receipt of a completed application(s) is no guarantee for funding of service(s).

## 2024 RFP Process Schedule

1. Public Notice / Solicitation.....Friday, March 5
2. Proposer's Conference..... Tuesday, June 6
3. Application Due (by 4:30pm) .....Friday, June 16
4. Staff Review ..... Monday, June 19 to Friday, July 14
5. Finance Committee Approval ..... Wednesday, July 19
6. Notice of Award (to selected vendors)..... Friday, August 18
7. Agreements Distributed for Signature..... Monday, August 28
8. Services Begin ..... Monday, October 2
9. Potential for Extension .....Annually for four additional years