



**BUCKEYE HILLS AREA AGENCY ON AGING  
APPLICATION OVERVIEW  
TITLE III-B SUPPORTIVE SERVICE FUNDS PY 2012  
TABLE OF CONTENTS**

<b>OVERVIEW.....</b>	<b>2</b>
<b>AVAILABLE FUNDING.....</b>	<b>2</b>
<b>APPLICATION PROCESS TIME LINE.....</b>	<b>4</b>
<b>REQUEST FOR PROPOSAL ANNOUNCEMENT .....</b>	<b>4</b>
<b>APPLICATION MATERIALS.....</b>	<b>4</b>
<b>APPLICATION DEADLINE REQUIREMENTS .....</b>	<b>5</b>
<b>APPLICATION REVIEW PROCESS.....</b>	<b>5</b>
<b>EVALUATION CRITERIA .....</b>	<b>6</b>
<b>NOTIFICATION OF AWARDS.....</b>	<b>6</b>
<b>AWARD APPEAL PROCESS .....</b>	<b>6</b>
<b>SUMMARY OF FUNDED SERVICES.....</b>	<b>8</b>
<b>CONTRACTING.....</b>	<b>9</b>
<b>DONATIONS, COST SHARING AND MATCHING FUNDS .....</b>	<b>9</b>
<b>REPORTING .....</b>	<b>10</b>
<b>MONITORING.....</b>	<b>10</b>
<b>NEW PROVIDER ORIENTATION .....</b>	<b>10</b>

## BUCKEYE HILLS AREA AGENCY ON AGING

### Application for Title III-B Supportive Service Funds PY 2012

#### OVERVIEW

The **Buckeye Hills Area Agency on Aging** Planning and Service Area (PSA) 8 is soliciting proposals from agencies which provide supportive services to individuals who are 60+ in Athens, Hocking, Meigs, Monroe, Morgan, Noble, Perry and Washington Counties.

AAA8 is soliciting applications from agencies which, at the time of application, provide Personal Care Service, Homemaker Service, Adult Day Service or Transportation Service. AAA8 is also soliciting applications for agencies who seek to provide a Grocery Shopping Assistance Program. Successful applicants will be awarded funds for the 12 month period from January 1, 2012 through December 31, 2012.

#### AVAILABLE FUNDING

Title III-B Supportive Service Program funding for Program Year (PY) 2012 is provided through the Ohio Department of Aging. The total available funding is estimated to be approximately **\$428,155.43**. *The State of Ohio Budget for PY 2012 has not been finalized. Therefore, funding amounts may be different when awards are granted. Awards may be reduced at any time if federal or state funding is reduced, even during the contract period.*

It is the policy of the BH-AAA8 that available funds shall be allocated to each county in the PSA by formula. Each county will have only those funds allocated by formula available to it. The allocation formula reflects 2000 census data for those elements for which 2000 census data is available.

In the event that a service gap is identified after reviewing all proposals received, BH-AAA8 reserves the right to allocate funds in a manner that ensures service delivery.

COUNTY	TITLE III-B/SCSBG TRANSPORTATION	TITLE III-B/SCSBG IN-HOME SERVICES	TOTAL COUNTY TITLE III-B/SCSBG ALLOCATION
Athens	\$34,711.04	\$26,838.97	\$61,550.01
Hocking	\$29,832.83	\$23,137.38	\$52,970.21
Meigs	\$28,959.71	\$22,474.84	\$51,434.55
Monroe	\$26,039.41	\$20,258.92	\$46,298.33
Morgan	\$26,636.93	\$20,712.31	\$47,349.24
Noble	\$24,387.47	\$19,005.41	\$43,392.88
Perry	\$29,578.28	\$22,944.22	\$52,522.50
Washington	\$41,015.16	\$31,622.55	\$72,637.71
TOTALS	\$241,160.83	\$186,994.60	\$428,155.43

## APPLICATION PROCESS TIME LINE

PY 2012 Title III-B Supportive Service Request for Proposal Announcement	June 1, 2011	
PY 2012 Title III-B Supportive Service application and instructions made available to prospective bidders	June 13, 2011	
Bidder's Conference	TBA - Week of June 27-July 1	
Proposal Application Due Date	August 1, 2011	
PY 2012 Title III-B Supportive Service Contracts mailed to successful bidders for signature	November 7, 2011	
PY 2012 Title III-B Supportive Service Contracts due back to BH-AAA8	November 30, 2011	
First day of PY 2012 Title III-B Supportive Service	January 1, 2012	
Last day of PY 2012 Title III-B Supportive Service	December 31, 2012	

### REQUEST FOR PROPOSAL ANNOUNCEMENT

#### Request for Proposals (RFP) for PY 2012 Title III-B Supportive Service

Funds announcement date: June 13, 2011

- Posted on BH-AAA8 website [www.areaagency8.org](http://www.areaagency8.org)
- Sent via email and fax to all *Older Americans Act*, *Title III-B Supportive Service* and *PASSPORT* providers currently contracted with BH-AAA8.
- Posted in legal notice section in newspapers throughout the eight-county service area.

### APPLICATION MATERIALS

All instructions and materials needed to apply for PY 2012 Title III-B Supportive Service funding are available to download from the BH-AAA8 website [www.areaagency8.org](http://www.areaagency8.org); **no hard copy applications will be available.** Required forms are in Microsoft Word and Excel. Applicants must use these forms and formats to apply for services; other forms and formats will not be accepted for review. All responses must be typed in a legible font style and size. Acceptable font styles are *Arial* or *New Times Roman*. Acceptable font sizes must be 10, 11 or 12 font; hand written or typed responses are not accepted.

The instructions and application documents are intended to assist applicants in applying for funding under this *Request for Proposals (RFP)* announcement. Nothing in the instructions or application documents is intended to impose any paper work beyond those specifically required under the regulations of the Ohio Department of Aging (ODA) and the Buckeye Hills – Area Agency on Aging 8 (BH-AAA8) competitive bidding process.

**In 2009, the Ohio Department of Aging issued rule changes which are now in Ohio Administrative Code and will be effective for all new competitive bidding processes, new contract agreements, and will change service specifications which define how services are delivered.** These rule changes include: Introduction and Definitions (rule 173-3-01), Competitive Bidding Process (rule 173-3-05), Appeals (rule 173-3-09), Provider Agreements (rule 173-3-04), Mandatory Clauses (rule 173-3-06), Criminal Background Check (rule 173-9-

01), Consumer Cost Sharing (rule 173-3-07), Adult Day Services (rule 173-3-06.1), Homemaker Service (173-3-06.4), Personal Care (rule 173-3-06.5), Transportation (rule 173-3-06.6), Grocery Shopping Assistance Service (rule 173-4-09). **THERE IS NO LONGER A STAND ALONE MEDICAL ESCORT SERVICE; THIS SERVICE HAS BEEN INCORPORATED INTO TRANSPORTATION.** Final rules are available at - <http://aging.ohio.gov/information/rules/current.aspx>

All applicants are encouraged to read all instructions and application materials before making a decision to apply for the Title III-B Supportive Service funding. The BH-AAA8 is not liable for any costs incurred or associated with the preparation of any applicant's application.

## **APPLICATION DEADLINE REQUIREMENTS**

**One (1) complete original and one (1) complete copy application in hard copy** must be received by the Buckeye Hills-Area Agency on Aging 8 (BH-AAA8) at: (Physical Address) 1400 Pike Street, Marietta, Ohio 45750 or (mailing address) P.O. Box 370, Reno, Ohio, 45773 by 4:00 p.m. on August 2, 2010. Faxed or emailed proposal applications will be rejected. If mailed, bidder is required to use certified return receipt. If hand delivered, bidder will be given a receipt at time of delivery.

Applications will be reviewed for completeness and compliance with required formats. The Buckeye Hills-Area Agency on Aging 8 will reject the following applications:

1. The application is not received by the required stated due date and time.
2. The application is missing any required document listed on the document checklist.
3. The application is missing any required signature.
4. The application is emailed or faxed.
5. The application contains altered application forms and/or formats.
6. The application responses are hand written and/or not in a legible font style or size.

It is not the responsibility of the BH-AAA 8, upon receipt of the proposal application, to notify applicants if they have not met any of the above listed application deadline requirements for completeness and/or compliance with required formats, even if the proposal is submitted before the application deadline.

## **APPLICATION QUESTIONS**

If you have questions about the application process call or email Mindy Cayton, AAA8 Planner Buckeye Hills-Area Agency on Aging 8 at 740-373-6400 or [mcayton@buckeyehills.org](mailto:mcayton@buckeyehills.org)  
Your questions will answered by the appropriate BH-AAA8 staff.

## **APPLICATION REVIEW PROCESS**

1. All applications accepted for review are evaluated by a team of *BH-AAA8 staff*. Funding recommendations to *Regional Advisory Council on Aging* will be made.
2. The *Buckeye Hills- Hocking Valley Regional Development District Executive Committee* reviews *Regional Advisory Council on Aging* recommendations.
3. The *Buckeye Hills- Hocking Valley Regional Development District Executive Committee* will make the final funding decision.

## EVALUATION CRITERIA

Each proposal accepted for review will be evaluated and scored using the following criteria:

Criteria	Score
Need for the proposed service within the continuum of service(s) available in the applicant's service area	20
Applicant meets all conditions of participation as outlined in the RFP. Applicant demonstrates knowledge and experience delivering proposed service(s) at the time of application and the capacity to deliver the service in accord with ODA defined service specifications.	10
Applicant demonstrates cost effectiveness, based on an itemization of the costs that comprise the total bid price for the service	20
Applicant demonstrates knowledge and experience serving persons 60+.	10
Applicant demonstrates the ability to conduct outreach efforts to find consumers in need within a defined service area, especially low-income minority individuals, older persons with limited English proficiency, and older persons residing in rural areas. Applicant specifies how he/she intends to provide services and satisfy those needs	20

Each proposed service will be evaluated and scored separately. All services will be ranked by score within each county.

The scoring system is used to compare and rank proposed services among provider agencies within each county. Funding is not determined by scores and rankings alone.

BH-AAA8 priorities related to geographic, demographic, and socioeconomic factors are considered in the review process.

BH-AAA 8 reserves the right to select one or more lower ranked services in order to achieve a continuum of services for targeted populations.

BH-AAA 8 reserves the right to award applicants less funds than requested if federal or state funding is not sufficient to fully fund all applicants that merit awards.

BH-AAA 8 reserves the right to reject any proposals received in response to this Request for Proposals; to request additional materials from any or all applicants; and to conditionally select proposals for funding.

## NOTIFICATION OF AWARDS

Successful bidders will be notified of award by receipt of contract for provision 2012 Supportive Services.

## AWARD APPEAL PROCESS

An applicant may appeal its award. The specified process for an appeal is as follows:

1. The complainant agency requesting an appeal must submit a certified letter to the AAA within thirty (30) days from the final decision of adverse action, which outlines the request for an appeal and supported reasons for a hearing.

2. Upon receipt of the request, the AAA will inform the complainant agency through a certified letter of the date, time, and location of the hearing to be held.
3. All receipts of such requests by complainant agencies shall be time/date stamped by the AAA.
4. The AAA will hold the hearing within forty-five days after the receipt of the request of the complainant agency.
5. The BH-HVRDD Executive Board, on the specified hearing date, will hear both parties present their case.
6. The Executive Board may terminate the hearing procedures at any point if the AAA or the complainant agency:
  - a. Negotiate a written agreement that resolves the issue(s) prompting the hearing; or
  - b. The complainant agency, in a written statement, withdraws their appeal.
7. Upon completion of the hearing, the Executive Board will make a decision and forward it to the AAA Director. The AAA Director will inform the complainant agency of the decision by a certified letter.
8. An agency may request a hearing by the Ohio Department of Aging in the event of an “adverse action”, which means an AAA’s action concerning a particular provider to not award a provider agreement to that provider. ODA shall only honor a request for an appeal hearing before ODA if the provider has fully complied with the written process for appealing an adverse action by the AAA that committed the adverse action and that AAA has rendered its final decision on the appeal. To request a hearing before ODA, the provider shall submit a written request to ODA’s director via certified mail no later than fifteen (15) business days after the date the AAA renders its final decision. ODA shall hold a hearing and render its final decision on the appeal no later than thirty (30) business days after the date of the hearing. *Rule 173-3-09.*

## SUMMARY OF FUNDED SERVICES

Services funded under this Request for Proposal are summarized below. These rules govern the use of these funds. All contracted providers must comply with these rules and will be monitored for compliance by the Buckeye Hills - Area Agency on Aging 8 Quality Improvement Department. **Printed hard copy of Rules, Service Specifications and Conditions of Participation will NOT be furnished to bidders.** Rules are posted on the Ohio Department of Aging website and are accessible through a link in the Provider Information section of the AAA8 website: [www.areaagency8.org](http://www.areaagency8.org)

- **Personal Care Service:** A service comprised of tasks that help a consumer achieve optimal functioning with Activities of Daily Living (eating, dressing, bathing, toileting, transferring in and out of bed/chair, and walking) and Instrumental Activities of Daily Living (preparing meals, shopping for personal items, medication management, managing money, using the telephone, doing heavy housework, doing light housework, and the ability to use available transportation without assistance). *Rule 173-3-06.5 (A)(1) and Rule 173-3-01 (B)(1) and B(10)*

- **Homemaker Service:** A service that provides routine tasks to help a consumer to achieve and maintain a clean, safe, and healthy environment. *Rule 173-3-06.4 (A) (1)*
- **Adult Day Service:** A non-residential, community-based service provided through an individualized care plan to encourage optimal capacity for self-care or maximizes functional abilities by meeting the needs of a consumer who has functional or cognitive impairments. *Rule 173-3-06.1*
- **Transportation service:** A service that transports a consumer from one place to another through the use of a provider's vehicle and driver. Examples of places to which the service may transport a consumer are a medical office, congregate nutrition program site, grocery store, senior center, or government office. *Rule 173-3-06.6*
- **Grocery Shopping Assistance Service:** A service that provides transportation to and from a grocery store or grocery ordering and delivery for a consumer who needs assistance to shop for groceries.

### SERVICE UNIT DEFINITIONS

Service	Service Code	Unit Definition	Service Specifications
Adult Day Care	05	4 to 8 Hour Day	Rule 173-3-06.1
Homemaker	02	One Hour	Rule 173-3-06.4
Personal Care	01	One Hour	Rule 173-3-06.5
Transportation	10	One-way trip	Rule 173-3-06.6
Transportation	10	Out-of-county, one passenger medical transportation.	Rule 173-3-06.6
Transportation	10	Out-of-county, multiple passenger medical transportation.	Rule 173-3-06.6
Grocery Shopping Assistance Service	33	One way transportation to or from a grocery store or one episode of grocery ordering and delivery	Rule 173-4-09

### CONTRACTING

The contracting method for Title III-B Service funds is **Purchase of Service**. A provider is reimbursed for only the units of service delivered based upon the contracted unit cost. The unit cost of service encompasses all elements associated with the production of the unit of service. *Rule 173-3-04 (C)* The provider must provide 100% of contracted units to achieve 100% reimbursement of contracted funds. If the provider does not deliver all service units during the contract period, unused Title III-B Service funds do not carry over from one state fiscal year to another.

The BH-AAA8 staff monitors the utilization of all contracted funds monthly. If any contracted provider has not utilized at least 75% of contracted funds for service delivery as of September

30, 2012, the award may be reduced and the BH-AAA8 will reallocate funds within the state fiscal year without a new Request for Proposals (RFP).

## **DONATIONS, COST SHARING AND MATCHING FUNDS**

### Matching Funds

Older Americans Act funds have a match requirement of 15%; match may be in-cash or in-kind.

### Cost Sharing

The current cost sharing policy (Rule 173-3-07) is available for review on the ODA website.

### Voluntary Contributions

Providers are encouraged to solicit and accept voluntary contributions (program income) for all Title III-B Service services.

## **REPORTING**

### **Social Assistance Management System (SAMS) Database**

Each funded provider agency shall be required to report all service delivery in the SAMS database according to the *Ohio Department of Aging Reporting Requirements*. BH-AAA8 will provide successful applicants with a subscription and license to access the Social Assistance Management System (SAMS) on AgingNetwork.com. Access and licenses to SAMS on AgingNetwork.com is limited to the contract period. The BH-AAA8 will provide training for the database application. Each funded provider agency must have two staff members who are trained and have access to the SAMS system.

Consumers must be registered by the Provider in the SAMS system, and units of service must be entered into the consumer's record on a monthly basis. A Request for Payment invoice and print out of the SAMS Monthly Agency Summary Report (in a format designated by BH-AAA8) must be submitted by the 10<sup>th</sup> day of the month following the provision of the service.

The SAMS application is hosted remotely through Harmony Information Systems, Inc. The application is accessible over the internet, without the need to install the application locally. Servers, network administration, updates, installations, maintenance, and disaster recovery are all handled by Harmony and are included in the AgingNetwork.com subscription service. AgingNetwork.com service is a web portal to Harmony applications. Each subscriber has a "domain", which is a controlled access area on Harmony's server where applications and customer databases may be accessed. The BH-AAA8 systems administrator arranges access to the site through user ID's and passwords. When users log in to the domain, they are presented with the applications that the domain owner is licensed. Access to specific database information is controlled by the administrator of the application, just as if it were installed locally. The application is HIPPA compliant.

If a provider chooses to use a software program other than SAMS, a request for waiver narrative must be submitted to BH-AAA8 in the proposal package stating the reason the waiver is being requested, the name of the software and an example of a monthly service delivery report for approval by the fiscal manager. The provider must offer proof that the software is compatible with SAMS and must work with Harmony/Synergy to ensure that the export/import process into SAMS is seamless.

### **QUARTERLY REPORTING**

Each funded provider agency shall be required to submit a quarterly report for each service they have provided with Title III-B Service funding. This quarterly report is due the 10<sup>th</sup> of the month following the end of the quarter in which the service was provided.

### **MONITORING**

Each Area Agency on Aging is responsible to the Ohio Department of Aging (ODA) for ensuring that all state and federal funds received from ODA are used in the manner that complies with state and federal laws. *Rule 173-3-04 (A)*. The BH-AAA8 monitors all contracted providers for compliance with service specifications and conditions of participation. This includes an annual on site visit to review service records and verify units of service reported for reimbursement.

### **NEW PROVIDER ORIENTATION**

New Title III-B Service funded providers will be required to participate in **Provider Orientation** sessions at the Buckeye Hills-Area Agency on Aging 8 offices. These sessions will include an overview of contracting, reporting, monitoring and basic skills in using the SAMS database application. Schedule to be determined.