



Request for Proposals and Program Guidelines:

*Innovative Local Models to Provide Volunteer Non-Medical Assistance to
Older Americans, Persons with Disabilities, and Family Caregivers*

Local Models Program

Issued January 2020

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1. Grant Overview

1.1. Background

- 1.1.1. 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, the National Association for Area Agencies on Aging, and Altarum (referred to as “Administrators” in this Request for Proposals).
- 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, persons 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 first cycle of Request for Proposals (RFP) 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 for between 12 and 18 months). Currently, federal funds are not secured beyond one year. Therefore, applicants in the first round of funding 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 type 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. Corporation for National and Community Service Programs
- 2.1.2.12. Time-banking or volunteer agencies with expertise in the delivery of home and community-based services to older adults and people with disabilities;
- 2.1.2.13. Entities with expertise in the delivery of services and supports to older adults, people 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. **Intent to Apply:** Interested applicants **may** submit an optional Intent to Apply notice, which will **not be** used to determine eligibility. Notices of Intent to Apply will only be used to inform the Administrators about anticipated application volume. Notices of Intent to Apply may be submitted January 15, 2020 - February 21, 2020 at CommunityCareCorps.org;
- 2.3.1.2. **Informational Calls:** Three optional informational conference calls will be held for interested parties. The same content will be addressed on each call. The calls will be recorded and posted to the Community Care Corps website;
- 2.3.1.3. Questions received in advance at Info@CommunityCareCorps.org will receive priority on the call. Participants may email additional questions during the call;
- 2.3.1.4. First call: January 29, 2020 at 1:00 p.m. ET;
- 2.3.1.5. Second call: February 25, 2020 at 1:00 p.m. ET;
- 2.3.1.6. Third call: March 17, 2020 at 1:00 p.m. ET;
Zoom webinar log-in information for the informational calls can be found on at CommunityCareCorps.org.

2.3.2. Application Timeline (the timeline is subject to change and may be extended, if necessary. The application due date will not be moved to a date before April 3, 2020. Please periodically check CommunityCareCorps.org for updates):

- 2.3.2.1. **January 15, 2020:** RFP available for view at CommunityCareCorps.org;
- 2.3.2.2. **January 15, 2020 – February 21, 2020:** Optional Notices of Intent to Apply (not required) may be submitted at CommunityCareCorps.org;
- 2.3.2.3. **February 10, 2020:** Applications may be submitted;
- 2.3.2.4. **April 3, 2020 at 5:00 pm ET:** Applications due;
- 2.3.2.5. **April – May 2020:** Applications reviewed;
- 2.3.2.6. **June 15, 2020:** Anticipated date for award announcements.

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 either Activities of Daily Living (such as dressing) or 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 either Activities of Daily Living (such as dressing) or 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;
 - 3.2.1.7. 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. Examples of non-medical volunteer services could include (not intended to be an exhaustive list and applicants may propose other non-medical services): respite, support groups, meal preparation, companionship and friendly visiting, help around the house, running errands, transportation, minor home modifications, stress reduction, assistance with home chores, and education and training.
- 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. 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 \$250,000.**
- 4.1.2. 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. For new local models, applicants may request an additional up to six months to plan for implementation. This is intended to give new local models enough “ramp-up” time, should they desire it, to get their volunteer programs up and running in order to be able to report meaningful outputs and outcomes.
 - 4.2.1.2. 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 25% 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 \$40,000 match, bringing the total program budget to \$160,000. Calculate minimum match as follows:

$$\text{Funds Requested} / 3 = \text{Minimum match amount}$$

- 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. Participating in regular “check-in” phone calls with The

Administrators' Community Care Corps Project Manager and others;

5.1.2.2. Participating in 3-4 cohort technical assistance webinars or conference calls per year, devoted to specific topics;

5.1.2.3. Participating in learning collaboratives to share information with other grantees in the same funding round.

5.1.3. Grantees will be subject to site visits.

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 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 through the use of reporting instruments that will be provided:

5.2.1. Quarterly Budget and Spending Report (form will be provided);

5.2.2. Quarterly Outputs Report (form will be provided);

5.2.3. Quarterly Outcomes Report (form will be provided).

5.2.4. Annual Report including:

5.2.4.1. Evidence of match form;

5.2.4.2. End of program summary, if applicable;

5.2.4.3. Story leads about one or two individuals whose lives have been touched or transformed by this program.

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 (form will be provided) such as: number of older adults and/or adults with disabilities assisted with non-medical care; number of family caregivers assisted with non-medical care; types of non-medical volunteer services provided (scope of services); methods of identifying individual clients' needs; method of matching volunteers with individual clients; volunteer training curricula and requirements; etc.

5.3.3.1. Grantees who are using funds to expand or enhance existing services will be required to report appropriate baseline data at the time of award.

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 like commitment to the organization and satisfaction with volunteering.

5.3.6. Grantees will be required to report summary outcomes data compiled from the individual surveys (form will be provided).

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 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, size, target population(s), 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 (Section 8).

7. Application

7.1. Intent to Apply (optional)

7.1.1. An (optional) Intent to Apply can be submitted between January 15, 2020 and February 21, 2020 at CommunityCareCorps.org.

7.1.2. The Intent to Apply consists of the following elements:

7.1.2.1. Name and address of organization;

7.1.2.2. Name, title, phone number(s), and email address of application author or main point of contact;

7.1.2.3. Geographic area served by program, as specific as possible

7.1.2.4. Target population.

7.1.3. Following submission of the Intent to Apply, applicants will receive a confirmation email.

7.2. Application

7.2.1. Applications will be submitted through the online portal available at CommunityCareCorps.org from **February 10, 2020 to no later than 5:00 p.m. ET, April 3, 2020**. (See 2.3 above)

7.2.2. If any technical support is required during the application process, please contact techsupport@CommunityCareCorps.org.

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

7.2.4. The proposal consists of the following elements:

7.2.4.1. Proposal;

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

- 7.2.4.3. Application Templates:
 - 7.2.4.3.1. Budget;
 - 7.2.4.3.2. Budget Narrative;
 - 7.2.4.3.3. Work Plan.
- 7.2.4.4. Financial Documentation:
 - 7.2.4.4.1. Full organization budget for current fiscal year;
 - 7.2.4.4.2. Full organization budget for most recent completed fiscal year;
 - 7.2.4.4.3. Independent audit letter, including any management letter issued;
 - 7.2.4.4.4. 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;
 - 7.2.4.4.5. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable;
 - 7.2.4.4.6. 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;
 - 7.2.4.4.7. DUNS number and SAM registration confirmation, or verification that registration is in progress;
 - 7.2.4.4.8. Documentation of the organization's indirect cost agreement with the government, if applicable.

- 7.2.5. Applicants must also include a 100-word executive summary of the proposed program.
 - 7.2.5.1. 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

- 8.1. Proposal (100 total points)
 - 8.1.1. Community Background (5 points)
 - 8.1.1.1. Describe the organization’s history of serving the community and the current services offered. (300 words)
 - 8.1.1.2. Describe the unmet needs of the community. (200 words)
 - 8.1.2. Program Overview and Details (35 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 existing clientele. Explain the rationale and strategy for creating your local model with the selected number of participants. (500 words)
 - 8.1.2.2. 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)
 - 8.1.2.3. 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)
 - 8.1.2.4. Explain the observable, 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)
 - 8.1.2.5. Explain the organization’s strategy to include community input into the proposed local model. (100 words)
 - 8.1.2.6. 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)

8.1.2.7. **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)

8.1.3. Sustainability and Dissemination (5 points)

8.1.3.1. Describe the organization's plan to meet the required minimum match. Explain how the strategy is feasible. (100 words)

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)

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)

8.1.4 Reporting and Evaluation

8.1.4.1 Your organization must agree to facilitate the collection of and provide data on the items listed in section 5.2 using the forms and technical assistance provided.

8.2. Budget (25 points)

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

8.2.1. Submit a proposed budget using the 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 (or up to 18 months if requesting a "ramp-up" period).

8.2.2. Budget Scoring:

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, or [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; and to be listed on p. 2 of the Budget).

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 \$300,000.
- 8.2.3.3.2 Examples of Indirect costs are rental costs for office space (excluding the cost of short-term rentals for event space for program-related activities), costs of operating and maintaining facilities, salaries and expenses of executive officers and/or administrative personnel, accounting, office equipment and office supplies.
- 8.2.3.3.5 Overhead **does not** include cellular phones or computers that are specifically dedicated to the program.

8.3. Budget Narrative

- 8.3.1. The budget narrative explains the rationale of the organization’s proposed budget, including program revenue sources and program expenses. The Review Committee will **not** be able to contact applicants with questions about the budget. Please 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 \$13.81 (based upon [AARP's estimated economic value of unpaid family caregiver contributions](#)).

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;

- 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 by 5:00 p.m. Eastern Time, April 3, 2020;
 - 8.5.1.2. Applicants must complete all templates, including the budget, budget narrative, and work plan, in accordance with sections 7 and 8 of the RFP. The budget must include a minimum match of 25% of the total program budget. Refer to 4.3.1 above for a sample calculation;
 - 8.5.1.3. Applications must include DUNS number(s) and SAM registration confirmation or verification that registration is in progress, in accordance with sections 2, 5, and 7;
 - 8.5.1.4. Applications must include an executive summary of the proposed program that does not exceed 100 words, in accordance with section 7.2.5.
 - 8.5.1.5. Applications must include three (3) letters of support from community partners or public officials.