



**Request for Proposals and Program Guidelines 2023:**  
*Innovative Local Models to Provide Volunteer Nonmedical Assistance to  
Older Adults, Adults with Disabilities, and Family Caregivers*

**Local Models Program**  
**Issued May 2023**

For more information, please contact:

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

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## 1. Grant Overview

### 1.1. Background

- 1.1.1. The Oasis Institute 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 USAging (referred to as “Administrators” in this Request for Proposals). Altarum, a nonprofit research and consulting organization, is 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 nonmedical assistance to older adults, adults with disabilities, and family caregivers; and to evaluate the effectiveness of those models in different communities nationally. The Administrators will work with grantees to identify Effective Elements, conceptual approaches used in model development and implementation that improve outcomes, reduce barriers and are replicable. These Effective Elements will be compiled into a searchable web tool that future individuals and organizations may use to develop, implement and right size a local model for their community.

### 1.2. Request for Proposals

- 1.2.1. The Administrators are seeking proposals for innovative local models in which volunteers assist family caregivers or directly assist older adults or adults with disabilities with nonmedical care in order to maintain their independence.
- 1.2.2. Administrators are offering two proposal options. Applicants will select one of the following:
  - 1.2.2.1. Option One: Funds are awarded to local organizations across the country to establish, enhance, or grow model volunteer programs in home or community-based settings. Community Care Corps volunteers perform nonmedical tasks, provide companionship, and support family caregivers.
  - 1.2.2.2. Option Two: Funds are awarded to local organizations across the country capable of building a network of screened and trained volunteer chaperones to accompany older adults and adults with disabilities in need to and from non-emergency medical appointments and outpatient procedures. The administrators seek applications that reflect the needs of their community, deliver services door through door, assist with needs pre- and post- appointments, and include appropriate stakeholders. Door through door assistance addresses care recipient expectations and needs before and after non-

- emergency medical appointments and outpatient procedures.
- 1.2.3. This is the 2023-2025 Request for Proposals (RFP) cycle under the five-year federal cooperative agreement.
  - 1.2.4. The Administrators will only commit to fund applicants for one grant period of 18 months. Previously funded organizations may submit an application proposing an entirely **new** local model. Funds will not be provided to support continuation, expansion or enhancement of current or past Community Care Corps local models. The new local model must be new to Community Care Corps although it does not have to be new to your organization. Currently, federal funds are not secured beyond one year. Therefore, applicants should consider this a single cycle grant. Grantees should provide plans for sustainability.

## **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, limited English-speaking populations and underserved communities.
- 2.1.2. Examples of the types of organizations that are eligible to apply are:
  - 2.1.2.1. Domestic public or private non-profit entities;
  - 2.1.2.2. Local communities;
  - 2.1.2.3. State, county, and local governments;
  - 2.1.2.4. Indian tribal governments and organizations (American Indian/Alaskan Native/Native American);
  - 2.1.2.5. Faith-based organizations;
  - 2.1.2.6. Community-based organizations;
  - 2.1.2.7. Hospitals and health care systems;
  - 2.1.2.8. Institutions of higher education;
  - 2.1.2.9. Local aging services organizations as defined in [102\(5\) of the Older Americans Act of 1965](#);
  - 2.1.2.10. Centers for independent living as defined in [section 702 of the Rehabilitation Act of 1973](#);
  - 2.1.2.11. AmeriCorps;
  - 2.1.2.12. Time-banking or volunteer agencies with expertise in the delivery of home and community-based services to older adults and 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 of commitment 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, including vehicles, unless such equipment is fundable under [Title IV of the Older Americans Act](#);
  - 2.2.1.13. Limitations related to the use of grant funds for meals can be found [here](#).
- 2.2.2. Successful applicants must have a Unique Entity ID and SAM registration by the time funding is disbursed (see Section 5.5.).
- 2.2.3. Funds awarded by the Administrators in this program are comprised of federal funds and are considered government grant dollars with all the stipulations that apply, as cited in Section 5.4.2.
- 2.2.4. 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.
- 2.2.5. Current or past grantees are eligible to submit applications for **new** models. Continuation grants are not allowed.
- 2.3. Grant Timeline
- 2.3.1. Application Process Overview:
- 2.3.1.1. **Informational Webinar:** One optional informational webinar will be held for interested parties on **June 6, 2023 at 2:00 ET**. The webinar will be recorded and posted to the [Community Care Corps website](#);
  - 2.3.1.2. Questions received in advance at [Info@CommunityCareCorps.org](mailto:Info@CommunityCareCorps.org) will receive priority on the call. Any question that is not answered during the Informational Webinar or on the website FAQ 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 7, 2023. Please periodically check [CommunityCareCorps.org](https://CommunityCareCorps.org) for updates):
  - 2.3.2.1. **May 8, 2023:** RFP available for view at [CommunityCareCorps.org](https://CommunityCareCorps.org);
  - 2.3.2.2. **May 22, 2023:** Applications may be submitted;
  - 2.3.2.3. **July 7, 2023 at 5:00 pm ET:** Applications due;
  - 2.3.2.4. **September 5, 2023:** Anticipated date for award announcements;
  - 2.3.2.5. **October 1, 2023-March 31, 2025:** Anticipated 18-month grant cycle for new applicants not previously funded or previously funded grantees proposing a new model.

### 3. **Eligible Populations and Volunteer Assistance**

- 3.1. **Eligible populations:** Local model volunteer programs must assist one or more of three eligible populations:
  - 3.1.1. Persons age 60 and older who have difficulty living independently and who require assistance with Instrumental Activities of Daily Living (such as cooking or doing laundry);
  - 3.1.2. Persons over age 18 with a disability (as defined in Section 3 of the [Americans with Disabilities Act of 1990](#)) who have difficulty living independently and who require assistance with Instrumental Activities of Daily Living (such as cooking or doing laundry);
  - 3.1.3. Family caregivers:
    - 3.1.3.1. The term ‘family caregiver’ means an adult family member or other individual (such as an unpaid family member, foster parent, friend, neighbor or other unpaid adult) who provides assistance to an individual with a chronic or other health condition, disability, or functional limitation;
    - 3.1.3.2. Volunteer assistance provided to family caregivers is intended to support their role as caregivers.
- 3.2. **Volunteer Assistance**
  - 3.2.1. Local model volunteer programs must:
    - 3.2.1.1. Address an unmet need in the community;
    - 3.2.1.2. Be delivered in home or community-based (non-institutional) settings;
    - 3.2.1.3. Provide nonmedical assistance and/or volunteer chaperone assistance to non-emergency medical appointments and outpatient procedures;
    - 3.2.1.4. Provide assistance 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](#) for additional information. The Administrators will hold a technical assistance webinar about background check requirements for all successful applicants.
- 3.2.1.7. Ensure that any personal identifying information (PII) from volunteers or from those receiving volunteer assistance is kept secure.
- 3.2.2. Local models can provide a wide range of volunteer assistance meeting the needs of their community.
- 3.2.3. Volunteer assistance **MUST** be nonmedical assistance or volunteer chaperone assistance. Volunteer assistance **MUST NOT** include any form of health care service including personal care services or medical advocacy during appointments.
- 3.2.4. Applicants are encouraged to be innovative in their approaches in determining what volunteer assistance would be particularly useful to address the unmet needs of the eligible populations they intend to serve. Applicants are encouraged to consider health equity and social determinants of health. 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 18-month grants ranging in size from **\$30,000 to \$200,000** to applicants who have not previously been awarded funding or previous grantees proposing a new local model.
- 4.1.2. This RFP process will be competitive. **Not all applications will receive funding, and those that do receive funding may not receive the full amount requested.**

##### 4.2. Grant Period

- 4.2.1. The grant period will be for 18 months.
  - 4.2.1.1. Proposed local models do not have to be new projects to an organization. However, funding must be used to expand or enhance a current project. 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 20% of the total program budget. Total Program Budget = Funds Requested + Match. The match may be comprised of cash, in-kind contributions, or a combination of both.** For example, an organization applying for a grant

of \$120,000 will be expected to contribute a \$30,000 match, bringing the total program budget to \$150,000. Calculate minimum match as follows: **(Funds Requested / .80) – Funds Requested = Minimum Match Amount.** Applicants who do not use this calculation to determine match will not be moved forward for consideration. The budget form and budget narrative also contain the formula to assist in determining the minimum 20% match requirement.

- 4.3.2. Matching resources take on the characteristics of the Administrators and federal funds and are therefore subject to the same rules regarding their use.
- 4.3.3. Grantees are responsible for raising minimum matches.
- 4.3.4. All proposals must detail the sources of their proposed match. Possible sources of match may include, but are not limited to:
  - 4.3.4.1. In-kind contributions:
    - 4.3.4.1.1. Volunteered time;
    - 4.3.4.1.2. Use of facilities to hold meetings.
  - 4.3.4.2. Program fees or other earned revenue from the applicant organization's budget;
  - 4.3.4.3. State government grants;
  - 4.3.4.4. Local government grants;
  - 4.3.4.5. Foundation grants/contributions;
  - 4.3.4.6. Corporate grants/contributions;
  - 4.3.4.7. Individual contributions;
  - 4.3.4.8. Other contributions.
- 4.3.5. The following sources **cannot** be used toward the match:
  - 4.3.5.1. Federal funds;
  - 4.3.5.2. Funds used to match other grants.

## **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 two (2) technical assistance webinars or conference calls per year, devoted to specific topics;
  - 5.1.2.3. Participation in virtual fiscal monitoring sessions with the Oasis grant accountant;
  - 5.1.2.4. Participation in learning collaboratives to share information with other grantees;
  - 5.1.2.5. Participation in virtual site visits with the Community Care



### Corps Administrators.

- 5.1.3. Grantees are expected to address sustainability of their local models beyond the grant period and to work with the Administrators on sustainability plans as appropriate.
- 5.1.4. Grantees are required to evaluate participants using a pre- and post-survey provided by the Administrators as described in Section 5.3., including distributing user-friendly pre- and post- surveys (survey forms will be provided) to all persons receiving and providing volunteer assistance in the grantee's local model, collecting the completed surveys and loading the responses into the provided database.
- 5.1.5. Grantees are required to collect a minimum of two (2) videos or written stories featuring caregivers and care recipients receiving assistance. Community Care Corps will provide the video platform.

### 5.2. Reporting Requirements

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

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

### 5.3. Evaluation Efforts

- 5.3.1. An important aim of Community Care Corps is to evaluate the effectiveness of local models by collecting conceptual approaches that improve outcomes, reduce barriers and are replicable. The concepts, Effective Elements, housed in a searchable tool and informed by the successes, challenges and missteps of former Community Care Corps grantees, will enable other organizations to create impactful local models tailored to their community.
- 5.3.2. Grantees will be required to collect and report **at least 12 months** of data that aids in evaluation. Applicants may utilize up to 6 months of the available 18 months at the start of the grant cycle to build needed infrastructure.
- 5.3.3. Grantees will be required to report certain output data (see section 5.2.) within the grantee portal such as: number of new older adults assisted; number of new adults with disabilities assisted; number of new family caregivers assisted; number of new volunteers providing assistance; number of hours of volunteer nonmedical assistance provided and number

of occurrences of each type of volunteer nonmedical assistance provided.

5.3.4. Grantees will be required to distribute a survey (see section 5.2.) to be filled out by individual family caregivers, older adults, and adults with disabilities receiving volunteer assistance and to the volunteers providing the nonmedical assistance or chaperone assistance (utilizing forms provided).

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

5.3.4.2. The data collected from these surveys is owned by the Administration for Community Living and will be accessed and analyzed by Altarum, a third-party evaluator. All grantees will have access to the aggregated data collected by their organization at the end of the grant period.

5.4. ACL Compliance

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

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

5.5. Unique Entity ID and SAM Registration

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

on this link, [SAM.gov](https://sam.gov), to complete your registration.

## 6. Review Process and Criteria

### 6.1. Review Process

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

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

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

6.1.3. **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, see Section 8.

## 7. Application

### 7.1. Application

7.1.1. Applications will be submitted through the online portal available at [CommunityCareCorps.org](https://CommunityCareCorps.org) from **May 22, 2023 to no later than 5:00 p.m. ET, July 7, 2023** (see 2.3. above).

7.1.2. If any technical support is required to complete your application in the SM Apply portal, please contact [techsupport@CommunityCareCorps.org](mailto:techsupport@CommunityCareCorps.org).

7.1.3. If any programmatic support is required during the application process, please contact [info@CommunityCareCorps.org](mailto:info@CommunityCareCorps.org).

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

7.1.5. The proposal consists of the following elements:

7.1.5.1. Proposal;

7.1.5.2. Application Templates:

7.1.5.2.1. Budget;

7.1.5.2.2. Budget Narrative;

7.1.5.2.3. Work Plan.

7.1.5.3. Financial Documentation:

7.1.5.3.1. Full organization budget for current fiscal year;

7.1.5.3.2. Full organization budget for most recent

- completed fiscal year;
  - 7.1.5.3.3. Independent audit letter, including any management letter issued;
  - 7.1.5.3.4. Most recent full organization audit by an outside independent auditor. A financial review by an outside independent auditor is acceptable if the organization does not engage in a financial audit;
  - 7.1.5.3.5. Most recent organization Single Audit (also known as Subpart F or A-133), if applicable;
  - 7.1.5.3.6. If your organization does not engage in an independent financial audit or review, you may provide your Form 990 and internally prepared financial statements for the most recent fiscal year. These should be accompanied by a letter from your CFO or board chair explaining why the organization does not engage in an independent financial audit or review;
  - 7.1.5.3.7. A copy of the organization’s current IRS tax-exempt status determination letter or most current Form 990, OR Certificate of Incorporation or equivalent document for qualified religious organizations not required to file Forms 990 and 1023. If not applicable, a letter from the applicant’s CFO or equivalent stating such and why;
  - 7.1.5.3.8. Unique Entity ID number and SAM registration confirmation, or verification that registration is in progress;
  - 7.1.5.3.9. Documentation of the organization’s indirect cost agreement with the government, if applicable;
  - 7.1.5.3.10. Completed and certified Financial Management Survey.
- 7.1.6. Applicants must also include a 100-word executive summary of the proposed program.
- 7.1.6.1. Sample executive summary: “Senior Services of Example County will provide a friendly visitor program, meal preparation, and lawn mowing services to people over age 70 living alone. The goal is to decrease self-reported social isolation and increase reported ability to live independently. We will be using 50 current volunteers for the friendly visitor program and recruit and train 75 new volunteers for the meal preparation and lawn mowing services. We believe adding these services to our existing efforts to reduce social isolation will increase the impact and lead to greater confidence in the ability of older adults to age in place.”

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

8.1. **Proposal (165 total points)**

8.1.1. Community Background (10 points)

8.1.1.1. Describe the organization's history of serving the community and the current services offered. (300 words) (5 points)

8.1.1.2. Describe the unmet needs of the community that you intend to address. Please provide data as localized as possible. (300 words) (5 points)

8.1.2. Program Overview and Details (60 points)

8.1.2.1. Present a descriptive summary of the proposed local model including its goals. List and describe the type and content of the volunteer assistance that will be provided, including any new services not previously offered by your organization. Indicate if this is a new model to your organization or an expansion or enhancement of a program your organization is currently implementing. Detailed goals and objectives should be provided in the work plan. (1000 words) (20 points)

8.1.2.2. In the table provided in the application portal, indicate the number of new older adults, new adults with disabilities and new family caregivers, as applicable, who will receive nonmedical volunteer assistance and the number of new volunteers who will provide the nonmedical volunteer assistance. Provide rationale for these projected numbers. (300 words) (5 points)

8.1.2.3. Describe any underserved population(s) to be served by the proposed local model as defined by [Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government, dated January 20, 2021](#). Provide a rationale (citing relevant data) for selecting the special target population(s), how these special target population(s) will be engaged, and the organizations (if applicable) that would be collaborating in reaching the proposed population(s). (350 words) (10 points)

8.1.2.4. Explain the anticipated outcomes from the local model (such as: mental well-being, confidence in sustaining in-home care, ability to live independently, caregiver stress, etc.). This should support the goals and objectives provided in the work plan. (100 words) (5 points)

8.1.2.5. Explain how the services provided through your local model are innovative or different. (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 the applicant proposes to work with other organizations or community partnerships.\**

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

8.1.3. Sustainability and Dissemination (15 points)

8.1.3.1. Describe the organization's plan to 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 recipients of volunteer assistance after the grant period ends should no other funding become available. (100 words) (5 points)

8.1.4. Reporting and Evaluation

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

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

8.2. Budget (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. No other forms, formats or alterations will be accepted. Only applications with budgets submitted on this Excel template will be reviewed.** List the amount of funds requested, the applicant’s minimum match, and the total program budget.
  - 8.2.1.1. This budget must encompass a period of 18 months.
- 8.2.2. Budget 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;
    - 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. Provide the percent of full-time equivalent employee (FTE), the annual salary, and the budgeted amount;
    - 8.2.3.2.2. Fringe benefits;
    - 8.2.3.2.3. Other direct program expenses necessary for the success of this grant program. See Budget template for more information and examples;
    - 8.2.3.2.4. Applicants should refer to the Uniform Guidance, or [45 CFR Part 75](#), specifically Subpart E, for guidance on allowability, reasonableness and allocability of specific expenses when preparing the budget.
  - 8.2.3.3. Indirect Costs:
    - 8.2.3.3.1. If the applicant has a federally approved indirect cost rate agreement, the applicant may use its approved rate. If the applicant does not have a federally approved indirect cost rate agreement, the applicant may include up to 10% of direct program costs as indirect costs. Total direct and indirect costs may not exceed the application cap of \$200,000;
    - 8.2.3.3.2. Examples of Indirect costs are rental costs for office space (excluding the cost of short-term rentals for

event space for program-related activities), costs of operating and maintaining facilities, salaries and expenses of executive officers and/or administrative personnel, accounting, office equipment and office supplies;

- 8.2.3.3.3. Cellular phones or computers that are specifically dedicated to the program **may be** included as a part of your direct cost budget.

### 8.3. Budget Narrative (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. No other forms, formats or alterations will be accepted. Only applications with budget narratives submitted on this writable pdf template will be reviewed.**

#### 8.3.2. Budget Narrative Scoring

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

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

#### 8.3.3. Program Revenue

8.3.3.1. Federal Funds Requested: this amount should equal the total federally funded expenses included in your Budget.

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

8.3.3.3. Non-Federal - In-Kind Contributions (Match): List all in-kind/non-monetary contributions the organization anticipates receiving and using for this program. Include a breakdown of the fair market monetary value. List the source of the contribution (i.e., an individual, organization, etc.). For contributions of personnel, please include salary/wage levels for each staff member and/or consultant. In addition, provide the cost of rental space, if applicable. Clarify whether each



contribution is secured, in process, or anticipated. If a reasonable and documentable fair market value of volunteer services is not easily determined, volunteer hours may be calculated with the following equation: number of hours worked multiplied by the [independent sector rate](#).

8.3.4. Program Expenses

8.3.4.1. Personnel: List all personnel supported by the grant and employed by the organization. Type 'current' or 'future' to differentiate between personnel who are currently employed by the organization and future hires. Enter the percent of full-time equivalent employee (FTE), the annual salary, and the budgeted amount.

8.3.4.2. Program Activities/Direct Program Costs: Explain the program activities expenses included in the Budget, including how you arrived at the amounts (unit cost x number of items for XX of participants served, for example). Please include the number of events, people, and/or items where applicable. Liability insurance coverage for volunteers is required. If the applicant does not currently maintain liability insurance coverage for volunteers, the applicant may include the cost of coverage as a part of their budget. Applicants who are funded will be required to provide proof of such coverage.

8.3.4.3. Indirect Costs: Explain the types of costs included in your indirect cost calculation. Please indicate if the organization has an indirect cost agreement with the federal government. If applicable, the indirect cost agreement should be uploaded in the Financial Documentation section of the application portal.

8.4. Work Plan (30 points)

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

8.4.1. Work Plan Definitions:

8.4.1.1. Goal: An aim or desired result of the local model;

8.4.1.2. Outcome: The measurable change or benefit resulting from the local model;

8.4.1.3. Output: The direct products of the local model's activities, services and deliverables;

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

8.4.1.5. Key Task: A focused and specific task often required to be finished within a certain time that is critical for reaching the major objective.

8.4.2. Work Plan Scoring:

- 8.4.2.1. The work plan for this grant should include the following characteristics:
  - 8.4.2.1.1. Clear program goals consistent with the narrative provided;
  - 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 local model goal:
  - 8.4.3.1. Complete the ALL GOALS sheet of the workbook, listing the name of the organization, date the work plan was developed and all the program goals. Applications may include up to five (5) goals;
  - 8.4.3.2. On the ALL GOALS sheet, create a key listing each staff position entered in the work plan and its associated abbreviation (e.g., SVP = Senior Vice President);
  - 8.4.3.3. Complete a separate work plan sheet for each goal. Delete any unused sheets;
  - 8.4.3.4. List the goal, measurable outcomes, and measurable outputs at the top of each Work Plan Goal sheet;
  - 8.4.3.5. List the major objectives for each goal and the main tasks under the objectives. Add rows for tasks and objectives, as necessary. Delete rows that are not necessary. Utilize only the number of objectives needed to achieve the goal. Do not exceed six (6) major objectives;
  - 8.4.3.6. In the column titled “Lead Person(s),” note the job title of the Individuals who will take the lead on accomplishing the task;
  - 8.4.3.7. 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.
- 8.5. 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 7, 2023**;
    - 8.5.1.2. Applicants **must** complete the budget form, budget narrative, and work plan found in the application portal, in accordance with sections 7 and 8 of the RFP. All forms must be completed using the original format of the provided templates. **No other**

**forms, formats or alterations will be accepted;**

- 8.5.1.3. The budget **must** include a minimum match of 20% of the total program budget. You must use the following calculation to determine the minimum 20% match value:  
**(Funds Requested / .80) – Funds Requested = Minimum Match Amount.** Applicants who do not use this calculation to determine match will not be moved forward for consideration. The budget form and budget narrative also contain the formula to assist in determining the minimum 20% match requirement. Refer to section 4.3.1.;
- 8.5.1.4. Applications **must** include an executive summary of the proposed program that does not exceed 100 words, in accordance with section 7.1.6.