



REQUEST FOR PROPOSALS No. 2023-04

For Older Americans Act Title IIIID
services

The County of San Mateo is seeking proposals for Older Americans Act (OAA) Title IIIID Disease Prevention and Health Promotion services for Aging and Adult Services.

The contracts awarded from this solicitation will be utilized by Aging and Adult Services for their OAA Title IIIID needs.

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Authorized Contact Person E-mail and address	vwright@smcgov.org 2000 Alameda de Las Pulgas, Suite 200 San Mateo, CA, 94403
RFP Released	10/2/2023
Letter of Intent Deadline	10/23/2023
Pre-proposal meeting date and time	10/17/2023 9:30am
Pre-proposal meeting location	Virtual (TBD)
Deadline for Questions, Comments and Exceptions	10/24/2023
Tentative date for the evaluation of bids	10/31/2023
Proposal Due Date and Time	10/26/2023
Tentative date for the announcement of awards	11/1/2023
Tentative protest or appeal deadline	11/7//2023
Contract Date	January 1, 2024-June 30, 2026

The date services are to begin	1/1/2024
Contract amount	\$150,000

Additional Documents:

Attachment 1 – Standards and workplan guidelines

Attachment 2 – IIID Proposal Application (Please also fill out other necessary requirements as mentioned in this document and send them all together)

Appendix A – Minimum Qualifications Checklist

Appendix B – Standard contract template

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SECTION I - INSTRUCTIONS FOR PROPOSERS

1.1 INTRODUCTION

The County of San Mateo (the “County” or SMC) covers most of the San Francisco Peninsula. The region covers 744 square miles and is home to nearly 800,000 residents. The County is made up of 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare and natural resources of the community.

Aging and Adult Services (AAS): San Mateo County AAS is a division of San Mateo County Health . The Division provides a wide range of services to assist older adults, people with disabilities and dependent adults to live as safely and independently as possible in the community, as well as services associated with administering the estates of deceased persons for whom there is no one able or willing to serve as administrator. With regard to services to older adults, AAS’s overall goal is to develop an integrated long-term supportive services system for older adults and adults with disabilities that is person-centered and responsive to the individual needs of older adults and adults with disabilities, focused on coordinated home and community-based services to maintain individuals in community settings and flexible in its use of resources while reducing administrative duplication, complexity and fragmentation. The Division provides direct services which include centralized intake and referral; assessment and consultation; protective and supportive services and case management.

The Older Americans Act (OAA) of 1965, reauthorized in 2016, was created to help older Americans continue to live independently in their homes and communities. The OAA created a multi-level network, consisting of the federal Administration for Community Living (ACL), State Units on Aging, and local Area Agencies on Aging (AAA). These agencies serve as focal points for planning and advocacy on senior issues. Funding for an array of services at the local level is available through the OAA and County General Funds. The intent of the funding available for all program areas included in this RFP is to improve the quality of life for San Mateo County's diverse population of older adults and persons with disabilities by making services available which assist them to live independently and avoid premature or unnecessary institutionalization.

The intent of this RFP is to solicit proposals from service providers to provide Title IIID (Disease Prevention and Health Promotion Services) for individuals 60 years of age or older, with emphasis on those in greatest economic and social need with particular attention to low income minority older individuals, older individuals with Limited English Proficiency (LEP), and older individuals residing in rural areas. [OAA § 305 (a)(2)– 22 CCR 7125, 7127, 7130,

The funding source for this contract is the California Department of Aging (CDA) and San Mateo County Health’s Behavioral Health and Recovery Services Division.

1.2 PRE-SUBMITTAL ACTIVITIES

A. Registration

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo at:

<https://www.publicpurchase.com/gems/register/vendor/register>

- (1) The County does not maintain the Public Purchase system and is not liable for site failures or technical problems. To resolve technical issues, contact Public Purchase at:
http://www.publicpurchase.com/gems/help/mainhelp.html?frame1=public/info.html&frame2=public/info_register.html

B. Questions, Comments, Exceptions

Submit questions, comments, and exceptions, including notifications of apparent errors, to the Public Purchase site by the Deadline for Questions, Comments and Exceptions. Questions and comments received after the deadline may not be acknowledged.

- (1) Request for changes

If requesting changes to a part of this solicitation, identify the specific words or phrases and the sections and paragraphs in which they occur. State the reason for each request and provide alternative suggested language. Failure to submit requests by the deadline will be deemed a waiver of any exception. The County's consideration of a suggestion does not imply acceptance. If sufficient proposals are received with no requested changes, the County may reject those requesting changes.

- (2) Request for Substitution of Specified Equipment, Material, or Process

- (a) Unless otherwise stated in the solicitation, references to items or processes by trade names, models or catalog numbers are to be regarded as establishing a standard of quality and not construed as limiting competition.
- (b) If requesting a substitution for a required item, submit requests by the Deadline for Questions, Comments, and Exceptions. Furnish all necessary information required for the County, in its sole judgement, to make a determination as to the comparative quality and suitability of any suggested alternatives. The County's decision will be final. If alternatives are accepted, the County will issue an addendum to the solicitation.

C. Revisions to the Solicitation

The County may cancel, revise, or reissue this solicitation, in whole or in part, for any reason. Revisions will be posted as addenda on <http://www.publicpurchase.com/>. No other revision of this solicitation will be valid. Proposers are responsible for ensuring that they have received all addenda from Public Purchase.

E. Contact with County Employees

Violation of the following prohibitions may result in a proposer being found non-responsible, barred from participating in this or future procurements, and becoming subject to other legal penalties.

- (1) As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through Public Purchase, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.

- (2) Proposers may not agree to pay any consideration to any company or person to influence the award of a contract by the County, nor engage in behavior that may be reasonably construed by the public as having the effect or intent of influencing the award of a contract.

F. Pre-proposal conference

A pre-proposal conference is scheduled virtually, answers to questions raised prior to and at the events will be posted on Public Purchase.

G. Proposal Format

Number all pages of the proposal. Label and order each section as follows:

1. Cover letter - no longer than one page, signed by an individual authorized to execute legal documents for the proposer, identifying the materials submitted.
2. Authorized contacts - identify the name and title the person to contact regarding the proposal, as well as all other individuals authorized to represent the organization in contract negotiations.
3. Table of Contents, listing all major topics and their respective page numbers.
4. Technical Proposal
5. Supplementary Documents, as requested
6. Fee Proposal

Documents should be created in the following format:

- Text be unjustified (i.e., with a ragged-right margin)
- Pages have margins of at least 1” on all sides (excluding headers and footers)
- Font size 11
- If the proposal is lengthy please include a Table of Contents
- PDF format is preferred

H. Technical Proposal Contents

See Section II: Qualifications, Submissions and Evaluation.

I. Supplementary Documents

If additional documents and materials are appropriate, or have been requested by the County, provide in the following order as applicable:

1. Minimum Qualifications, using County forms if provided.
2. Organizational Capacity and Experience, describing work of a similar nature undertaken for a similar entity.
3. Attachments, certifications, and forms executed as applicable.

J. Price Proposal (For this proposal, please submit fee proposal only)

1. Place all cost and pricing data in a separate sealed envelope clearly marked “PRICE PROPOSAL”.
2. If forms and templates are provided for the Price Proposal, use them without modification. Failure to use the forms or templates provided, or modification of them, may result in rejection of the entire proposal.
3. Alternative Price Proposals may be submitted, but only in addition to, not in lieu

of, the requested Price Proposal. If submitting an alternative Price Proposal, clearly identify it as an alternative.

4. Include prices for the base period of service and if applicable, for each additional year including option years.

1.3 PROPOSAL SUBMISSION

Submit proposals as directed below.

(1) Electronic Submissions

Include the proposer name and the RFP title and number in each filename. Submit proposals via the Public Purchase website, allowing sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate and proposals will be rejected. The Public Purchase submission time will be the official submission time. Contact Public Purchase with technical questions regarding the site. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the Public Purchase system.

(2) Conflicts between Certain Requirements

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the Public Purchase site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

- (3) Hand-written responses, whether or not submitted electronically, will be rejected, with the exception that signatures may be hand-written.

Errors in Proposals

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are incomplete, are missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities but such waiver will not modify any remaining RFP requirements.

Proposers are responsible for reviewing all portions of this RFP. Proposers are to notify the department, in Public Purchase, if the proposer discovers any ambiguity, discrepancy, omission, or apparent error in the RFP. Such notification should be made promptly after discovery, but in no event later than five business days prior to the deadline for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

1.4 PROPOSER CERTIFICATIONS

By submitting a proposal, each proposer certifies under penalty of perjury that:

- Its submission is not the result of collusion or any other activity that would tend to directly or indirectly influence the selection process; and
- Proposer is able or will be able to comply with all requirements of this solicitation at the time of contract award; and
- Neither proposer, its employees, nor any affiliated firm providing the requested goods and services has prepared plans, specifications, terms or requirements for this solicitation, or has any other actual or potential conflict of interest; and

- Proposer is aware of the provisions of Section 1090 et seq. and Section 87100 et seq. of the California Government Code relating to conflict of interest of public officers and employees, and is unaware of any financial or economic interest of any County officer or employee relating to this solicitation.

1.5 WITHDRAWAL OF PROPOSALS

Proposals may be withdrawn, modified, or replaced at any time prior to the Due Date and Time. After that time, whether or not a new solicitation is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

Revision or Withdrawal of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original on or before the proposal due date.

A proposer may withdraw a proposal at any time before the deadline for submission of proposals. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

1.6 NO COMMITMENT

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a contract, nor will the County defray any costs incurred in preparing proposals or participating in any presentations or negotiations.

1.7 ESTIMATED QUANTITIES

If the solicitation results in an indefinite quantity or a requirements Agreement, the goods and services actually requested by the County may be less than the maximum value of the Agreement and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the Agreement.

1.8 PROPOSER SELECTION

At any time in the evaluation process, the County may request clarifications from proposers.

Determination of Responsiveness

A responsive proposal conforms to the instructions set forth in this solicitation and any modifications to it. Non-responsive proposals will be rejected. The County, in its sole discretion, may waive non-consequential deviations if the deviations cannot have provided an advantage over other proposers.

Proposal Evaluation

The County will establish an evaluation committee which will evaluate responsive proposals based on the criteria specified in the solicitation. The committee may then recommend one or more top-

ranked proposers for final negotiation of contract terms, or may invite one or more proposers for oral presentations and demonstrations, following which those proposers may be allowed to amend their proposals. After evaluating presentations and amended proposals, the committee may recommend one or more top-ranked proposers for final negotiation of contract terms.

Determination of Responsibility

The County will make a determination of the responsibility of any proposer under consideration for award, taking into consideration matters such as the proposer's integrity, compliance with public policy and laws, past performance, fiscal responsibility, trustworthiness, financial and technical resources, capacity, and experience to satisfactorily carry out its responsibilities. The County will notify any proposer found non-responsible and allow the finding to be contested.

1.9 CONTRACT AWARD

Notice of Intent to Award

Once a decision has been made to award a contract to one or more proposers, the County will post a Notice of Intent to Award, notifying the remaining proposers of their non-selection. The posting may be inclusion of the recommendation to award as an agenda item on the Board of Supervisors schedule.

Award Procedure

Contract negotiations are neither an offer nor an implicit guarantee that a contract will be executed. Award, if made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached Standard Agreement template.

Commencement of Performance

After all parties have signed the Agreement, the County will notify the proposer and performance may proceed. Prior to County execution of the Agreement, no County employee may authorize work. Any work performed prior to that time may be uncompensated.

1.10 PROTESTS

Protests that do not comply with the protest procedures outlined below will be rejected.

Protest of Non-Responsiveness Determination

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

Protest Eligibility, Format, and Address

- (1) Protests or objections may be filed regarding the procurement process, the content of the solicitation or any addenda, or contract award. Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more

than ten (10) calendar days after the RFP is issued, provide written notice to the department, via Public Purchase, setting forth with specific grounds for the objection.

- (2) The County will only review protests submitted by an interested party, defined as an actual or prospective proposer whose direct economic interest could be affected by the County's conduct of the solicitation. Subcontractors do not qualify as interested parties.
- (3) All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered.
- (4) Submit protests to the Nina Rhee, Director of Aging and Adult Services by e-mail to nrhee@smcgov.org.

Protest Deadlines

Submit protests with any supplemental materials by 5 p.m. PST, as appropriate, on the deadlines set forth below. The date of filing is the date the County receives the protest, unless received after 5 p.m. PST, or on other than a Business Day, in which case the date of filing will be the next Business Day. Failure to file by the relevant deadline constitutes a waiver of any protest on those grounds. Supplemental materials filed after the relevant deadline may be rejected by the County.

- (1) If relating to the content of the solicitation or to an addendum, file within five Business Days after the date the County releases the solicitation or addendum.
- (2) If relating to any notice of non-responsiveness or non-responsibility, file within five Business Days after the County issues such notice.
- (3) If relating to intent to award, file within five Business Days after the County issues notice of Intent to Award. No protests will be accepted once actual award has been made.

Protest Contents

- (a) The letter of protest must include all of the following elements: Detailed grounds for the protest, fully supported with technical data, test results, documentary evidence, names of witnesses, and other pertinent information related to the subject being protested; and
- (b) The law, rule, regulation, ordinance, provision or policy upon which the protest is based, with an explanation of the violation.
- (c) The protest must be signed by an individual authorized to represent the proposer.

Protests that simply disagree with decisions of the Evaluation Committee will be rejected.

Reply to Protest

The County will send a written response to the protestor and to any other party named in the protest.

No Stay of Procurement Action during Protest

Nothing in these protest requirements will prevent the County from proceeding with negotiations or awarding a purchase order or contract while a protest is pending.

1.11 PUBLIC RECORDS

General

- (1) All proposals, protests, and information submitted in response to this solicitation will become

the property of the County and will be considered public records. As such, they may be subject to public review.

- (2) Any contract arising from this RFP will be a public record.
- (3) County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer.
- (4) Submission of any materials in response to this RFP constitutes:
 - (a) Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
 - (b) Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
 - (c) Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and
 - (d) Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

Confidential Information

- (1) The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer. Proposers are responsible for asserting any applicable privileges or reasons why a document should not be produced in response to a public record request.
- (2) If submitting information protected from disclosure as a trade secret or any other basis, identify each page of such material subject to protection as "CONFIDENTIAL". If requested material has been designated as confidential, the County will attempt to inform the proposer of the public records request in a timely manner to permit assertion of any applicable privileges.
- (3) Failure to seek a court order protecting information from disclosure within ten days of the County's notice of a request to the proposer will be deemed agreement to disclosure of the information and the proposer agrees to indemnify and hold the County harmless for release of such information.
- (4) Requests to treat an entire proposal as confidential will be rejected and deemed agreement to County disclosure of the entire proposal and the proposer agrees to indemnify and hold the County harmless for release of any information requested.
- (5) Trade secrets will only be considered confidential if claimed to be a trade secret when submitted to the County, marked as confidential, and compliant with Government Code Section 6254.7.

1.12 TERM OF PROPOSAL

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the proposed agreement term and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

1.13 FINANCIAL RESPONSIBILITY

The County shall have no financial responsibility for any costs incurred by a firm in responding to

this RFP.

1.14 RESERVATION OF RIGHTS BY THE COUNTY

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue a RFP;
- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

1.15 NO WAIVER

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

1.16 COOPERATIVE AGREEMENT (PIGGYBACK)

This competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of any agreement resulting from this solicitation may be used by other organizations as a Cooperative Agreement.

This provision in no way commits any affiliate to procure services from any awarded contractor, nor does it guarantee any additional orders will result. At their discretion, and subject to their own procurement policies, interested organizations may make use of this competitive procurement and contract directly from the awarded contractor.

- 1.17 FUNDING FOR THIS CONTRACT** shall be contingent upon the availability of State and federal funds. This contract will be negotiated on a yearly basis up to June 30, 2026. After that, a new RFP application needs to be submitted to continue receiving funding.

1.18 INSTRUCTIONS ON OBTAINING HELPFUL INFORMATION

Bidders may review all of the information listed below by contacting Anna Sawamura, Health Services Manager at asawamura@smcgov.org.

(A) Authorizing statutes and federal and State regulations.

(B) The federal Office of Management and Budget Administrative and Cost Policy circulars.

(C) The AAA's:**1.** Policy manuals and memoranda.**2.** Reporting requirements and procedures.**3.** Assessment/evaluation criteria and instruments.**4.** Appeal procedures.**5.** Any other public information that the AAA determines may be helpful to prospective bidders.

1.19 CONTRACT MODIFICATIONS

The selected bid/proposal shall be made a part of the contract. The AAA may negotiate modifications after the bid/proposal has been selected to assure that all necessary program

requirements are covered before the contract is signed.

SECTION II - QUALIFICATIONS, SUBMISSION AND EVALUATION CRITERIA

2.1 MINIMUM QUALIFICATIONS

Proposals will be accepted only from organizations that meet the following required qualifications at the time of proposal submission:

- 2.1.1 An applicant must be an incorporated private nonprofit organization or a public body.
- 2.1.2 Proposer is registered and in good standing with <https://sam.gov/SAM/>.
- 2.1.3 Applicants must be able to serve clients in San Mateo County.
- 2.1.4 Has provided similar services for two years.

2.2 SUBMISSION

Firms interested in responding to this RFP must submit the following information, in the order specified below.

The technical proposal is comprised of:

A. Introduction and Executive Summary (up to 1 page)

Submit a letter of introduction. The letter must be signed by a person authorized by your agency to obligate your firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your agency is willing and able to perform the commitments contained in the proposal.

The letter must contain:

- Name, title and contact information (email, phone, and address) for representative of proposer that is responsible for communication related to this RFP.
- Name, title, contact information, and signature of person authorized to obligate agency to perform the commitment contained in the proposal.
- All applicable licenses and license numbers relevant to the project, the names of the holders of those licenses, and the names of the agencies issuing the licenses.
- If portions of work will be performed by subcontractors, names of proposed subcontractors other than suppliers and descriptions of their respective responsibilities.

B. Statement of Minimum Qualifications (up to 1 page)

Submit a signed copy of Appendix A: Minimum Qualifications

C. OAA Proposal template (see attachment)

Fee Proposal is comprised of:

A. Fee Proposal

Complete the fee proposal template for the scoring of the Fee Proposal as listed under **TAB 8** of the Proposal template. **Pricing shall be set until June 30, 2026.**

2.3 EVALUATION CRITERIA

Proposals will be evaluated in accordance with the following evaluation criteria out of a score of 100. Bid/Proposal Evaluation Panel will be composed by people from the Aging Community within San Mateo County.

2.1.1 Proposed services (40 points)

- Adequacy of the service/program plan or methodology.
- Ability to meet AAS performance measures as indicated under Section IV, Scope of Work.
- Adequacy of the bidder's facilities and resources.
- Cost-effectiveness of the bidder's service/program.
- Comparability of the objectives in the bid/proposal to the objectives specified in the RFP.
- Assets, expertise, experience, data or technology that provides your organization with a competitive advantage.

2.1.2 Firm and Staff Qualifications (25 points)

- Qualifications and experience of both the proposer and key personnel.
- Organizational resources and staff, apparent ability to respond to requests.
- Quality of similar program previously or currently run by the agency.
- Workload, staff availability and accessibility.

2.1.3 Fee Proposal (35 Points)

The table below explains the method by which the fee proposal is scored. Each line item of the fee proposal will be totaled. The results will be compared to the other proposers and this determines the lowest cost proposal. The calculation as detailed below will then be applied. The results for each firm will be tallied and finalized. The fee proposal score will then be combined with the other scores for the final result.

The lowest cost proposal for each category will receive the maximum number of points assigned to the fee proposal evaluation criteria. All other proposals will be assigned points by dividing the amount of the lowest total fee proposed by the amount of their respective total fee proposed and then multiplying the resulting number of the maximum number of points available to receive the proposers score.

For example, if a total of 35 points are assigned to evaluate the fee proposal, Firm A offers the lowest fee proposal of \$1000 receives all 35 points. Firm B is the next lowest proposal that offers \$1200 receives a score of 29.05 points (\$1000 divided by \$1200 multiplied by 35 points). Firm C has the highest proposal that offers \$1500 and receives a score of 23.10 (\$1000 divided by \$1500 multiplied by 35 points).

Firm	Firm A	Firm B	Firm C
Total Cost	\$1000	\$1200	\$1500
Calculation	-	$\frac{1000}{1200}$	$\frac{1000}{1500}$
Points Achieved %	1.0	0.83	0.66
Points (Max 25)	35	29.05	23.10

SECTION III - INSURANCE

Provide evidence of insurance for each of the checked categories

<input checked="" type="checkbox"/>	General Liability (Including operations, products and completed operations, as applicable.)	\$1,000,000 - per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, the general aggregate limit either must apply separately to this project or must be twice the required occurrence limit.
<input checked="" type="checkbox"/>	Automobile Liability	\$1,000,000 - per accident for bodily injury and property damage.
<input checked="" type="checkbox"/>	Workers' Compensation	As required by the State of California
<input type="checkbox"/>	Employers' Liability	\$1,000,000 - each accident, \$1,000,000 policy limit bodily injury by disease, \$1,000,000 each employee bodily injury by disease.
<input type="checkbox"/>	Professional Liability (Errors and Omissions)	\$1,000,000 - per occurrence.
<input type="checkbox"/>	Cyber Liability	\$5,000,000 per occurrence for Privacy and Network Security, \$1,000,000 per occurrence for Technology Errors and Omissions To be carried at all times during the term of the Contract and for three years thereafter.
<input type="checkbox"/>	Pollution Liability	\$ - Per Occurrence
<input type="checkbox"/>	Pollution Liability (Aggregate)	\$

SECTION IV - SCOPE OF WORK AND SPECIAL PROVISIONS SUMMARY

The Older Americans Act (OAA) of 1965, reauthorized in 2016, was created to help older Americans continue to live independently in their homes and communities. The OAA created a multi-level network, consisting of the federal Administration for Community Living (ACL), State Units on Aging, and local Area Agencies on Aging (AAA). These agencies serve as focal points for planning and advocacy on senior issues. Funding for an array of services at the local level is available through the OAA and County General Funds. The intent of the funding available for all program areas included in this RFP is to improve the quality of life for San Mateo County's diverse population of older adults and persons with disabilities by making services available which assist them to live independently and avoid premature or unnecessary institutionalization.

GENERAL NEED AND EXPECTED OUTCOME

Contractor should have the ability to serve individuals within the target populations described below. Services to be considered should be targeted to individuals in greatest social and/or economic need. While all eligible individuals may not be included in the categories listed below, it is the intent of the OAA that services be targeted to individuals with the following characteristics who live either in the community or in long-term care facilities:

- Low income minority older individuals;
- Older individuals with the greatest economic need (individuals with an income level at or below the poverty line);
- Older individuals with the greatest social need (those needs caused by non-economic factors): Physical and mental barriers ; Language barriers ; Cultural, social or geographic isolation including isolation caused by racial or ethnic status that: Restricts the ability of an individual to perform normal daily tasks or Threatens the capacity of the individual to live independently;
- Older Native Americans;
- Isolated, abused, neglected and/or exploited older individuals;
- At-risk older persons and their caregivers;
- Older individuals residing in rural areas;
- Older individuals who have limited English-speaking ability;
- Older individuals with Alzheimer's disease or related disorders with neurological and organic brain dysfunction and their caregivers;
- Older individuals with caregiver responsibilities for developmentally disabled children or spouses; and
- Older individuals who provide uncompensated care to their adult children with disabilities.

Client Eligibility: The eligible populations for most programs included in this RFP include older adults age of 60 and above, 55 and above for some programs and persons with disabilities ages 18-59. See individual program standards for client eligibility criteria specific to each program. While applicants are encouraged to serve individuals in need of services but who do not fall within the eligibility criteria in this RFP, the cost of those services will be the responsibility of the provider and/or the participant.

FUNDING

Funds for services in this proposal may include local, State, and federal funds received by Aging & Adult Services.

PERFORMANCE MEASURES AND DELIVERABLES:

1. Number of unduplicated older adults and adults with disabilities served by funded programs.
2. Percentage of participants that report improved health outcomes after participation of the program.

Monitoring Requirements: Contract awardees will be monitored at least annually by AAS staff. Specific areas of business/performance will be addressed during contract negotiation.

Appendix A – Minimum Qualifications Checklist

Complete this form and attach it to your firm's Proposal.

I, *Insert Name*, am a *Insert Title at Insert Firm* and am authorized to execute this Certification on its behalf.

Minimum Qualifications

Proposals will be accepted only from firms that meet the following required qualifications:

Please check box if your firm meets these qualifications:

- Program manager has a minimum of two (2) years of experience within the last five (5) years in providing services similar to OAA Title IIID.
- Ability to provide OAA Title IIID services.

Please check box if your firm can provide this additional service:

- Proposer has at least one (1) physical location in San Mateo County

Name of Location:

Address:

Required Registration

Please check box to indicate your firm is registered with the System for Award Management (SAM).

Proposer is required to be in good standing with <https://sam.gov/SAM/>

- Registered as

UEI No. :

I certify that the foregoing information is true and correct as of the date of this Certificate.

Signature: _____

Date: Click or tap to enter a date.

Appendix B – Standard contract template

Agreement No. _____

AGREEMENT BETWEEN THE COUNTY OF SAN MATEO AND [Contractor name]

This Agreement is entered into this _____ day of _____, 20_____, by and between the County of San Mateo, a political subdivision of the state of California, hereinafter called "County," and [Insert contractor legal name here], hereinafter called "Contractor."

* * *

Whereas, pursuant to Section 31000 of the California Government Code, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof; and

Whereas, it is necessary and desirable that Contractor be retained for the purpose of [Enter information here].

Now, therefore, it is agreed by the parties to this Agreement as follows:

1. **Exhibits and Attachments**

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A—Services
Exhibit B—Payments and Rates
Attachment H—HIPAA Business Associate Requirements

Attachment I—§ 504 Compliance
Attachment IP – Intellectual Property

2. **Services to be performed by Contractor**

In consideration of the payments set forth in this Agreement and in Exhibit B, Contractor shall perform services for County in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibit A.

3. **Payments**

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed [write out amount] (\$Amount). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

4. **Term**

Subject to compliance with all terms and conditions, the term of this Agreement shall be from [Month and day], 20[last 2 digits of start year], through [Month and day], 20[last 2 digits of end year].

5. Termination

This Agreement may be terminated by Contractor or by the [Title of County Department Head] or his/her designee at any time without a requirement of good cause upon thirty (30) days' advance written notice to the other party. Subject to availability of funding, Contractor shall be entitled to receive payment for work/services provided prior to termination of the Agreement. Such payment shall be that prorated portion of the full payment determined by comparing the work/services actually completed to the work/services required by the Agreement.

County may terminate this Agreement or a portion of the services referenced in the Attachments and Exhibits based upon the unavailability of Federal, State, or County funds by providing written notice to Contractor as soon as is reasonably possible after County learns of said unavailability of outside funding.

County may terminate this Agreement for cause. In order to terminate for cause, County must first give Contractor notice of the alleged breach. Contractor shall have five business days after receipt of such notice to respond and a total of ten calendar days after receipt of such notice to cure the alleged breach. If Contractor fails to cure the breach within this period, County may immediately terminate this Agreement without further action. The option available in this paragraph is separate from the ability to terminate without cause with appropriate notice described above. In the event that County provides notice of an alleged breach pursuant to this section, County may, in extreme circumstances, immediately suspend performance of services and payment under this Agreement pending the resolution of the process described in this paragraph. County has sole discretion to determine what constitutes an extreme circumstance for purposes of this paragraph, and County shall use reasonable judgment in making that determination.

6. Contract Materials

At the end of this Agreement, or in the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and other written materials (collectively referred to as "contract materials") prepared by Contractor under this Agreement shall become the property of County and shall be promptly delivered to County. Upon termination, Contractor may make and retain a copy of such contract materials if permitted by law.

7. Relationship of Parties

Contractor agrees and understands that the work/services performed under this Agreement are performed as an independent contractor and not as an employee of County and that neither Contractor nor its employees acquire any of the rights, privileges, powers, or advantages of County employees.

8. Hold Harmless

a. General Hold Harmless

Contractor shall indemnify and save harmless County and its officers, agents, employees, and servants from all claims, suits, or actions of every name, kind, and description resulting from this Agreement, the performance of any work or services required of Contractor under this Agreement, or payments made pursuant to this Agreement brought for, or on account of, any of the following:

- (A) injuries to or death of any person, including Contractor or its employees/officers/agents;
- (B) damage to any property of any kind whatsoever and to whomsoever belonging;
- (C) any sanctions, penalties, or claims of damages resulting from Contractor's failure to comply, if applicable, with the requirements set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended; or
- (D) any other loss or cost, including but not limited to that caused by the concurrent active or passive negligence of County and/or its officers, agents, employees, or servants. However, Contractor's duty to indemnify and save harmless under this Section shall not apply to injuries or damage for which County has been found in a court of competent jurisdiction to be solely liable by reason of its own negligence or willful misconduct.

The duty of Contractor to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

- b. Intellectual Property Indemnification** Contractor hereby certifies that it owns, controls, and/or licenses and retains all right, title, and/or interest in and to any intellectual property it uses in relation to this Agreement, including the design, look, feel, features, source code, content, and/or other technology relating to any part of the services it provides under this Agreement and including all related patents, inventions, trademarks, and copyrights, all applications therefor, and all trade names, service marks, know how, and trade secrets (collectively referred to as "IP Rights") except as otherwise noted by this Agreement.

Contractor warrants that the services it provides under this Agreement do not infringe, violate, trespass, or constitute the unauthorized use or misappropriation of any IP Rights of any third party. Contractor shall defend, indemnify, and hold harmless County from and against all liabilities, costs, damages, losses, and expenses (including reasonable attorney fees) arising out of or related to any claim by a third party that the services provided under this Agreement infringe or violate any third-party's IP Rights provided any such right is enforceable in the United States. Contractor's duty to defend, indemnify, and hold harmless under this Section applies only provided that: (a) County notifies Contractor promptly in writing of any notice of any such third-party claim; (b) County cooperates with Contractor, at Contractor's expense, in all reasonable respects in connection with the investigation and defense of any such third-party claim; (c) Contractor retains sole control of the defense of any action on any such claim and all negotiations for its settlement or compromise (provided Contractor shall not have the right to settle any criminal action, suit, or proceeding without County's prior written consent, not to be unreasonably withheld, and provided further that any settlement permitted under this Section shall not impose any financial or other obligation on County, impair any right of County, or contain any stipulation, admission, or acknowledgement of wrongdoing on the part of County without County's prior written consent, not to be unreasonably withheld); and (d) should services under this Agreement become, or in Contractor's opinion be likely to become, the subject of such a claim, or in the event such a third party claim or threatened claim causes County's reasonable use of the services under this Agreement to be seriously endangered or disrupted, Contractor shall, at Contractor's option and expense, either: (i) procure for County the right to continue using the services without infringement or (ii) replace or modify the services so that they become non-infringing but remain functionally equivalent.

Notwithstanding anything in this Section to the contrary, Contractor will have no obligation or liability to County under this Section to the extent any otherwise covered claim is based upon: (a) any aspects of

the services under this Agreement which have been modified by or for County (other than modification performed by, or at the direction of, Contractor) in such a way as to cause the alleged infringement at issue; and/or (b) any aspects of the services under this Agreement which have been used by County in a manner prohibited by this Agreement.

The duty of Contractor to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

9. Assignability and Subcontracting

Contractor shall not assign this Agreement or any portion of it to a third party or subcontract with a third party to provide services required by Contractor under this Agreement without the prior written consent of County. Any such assignment or subcontract without County's prior written consent shall give County the right to automatically and immediately terminate this Agreement without penalty or advance notice.

10. Insurance

a. General Requirements

Contractor shall not commence work or be required to commence work under this Agreement unless and until all insurance required under this Section has been obtained and such insurance has been approved by County's Risk Management, and Contractor shall use diligence to obtain such insurance and to obtain such approval. Contractor shall furnish County with certificates of insurance evidencing the required coverage, and there shall be a specific contractual liability endorsement extending Contractor's coverage to include the contractual liability assumed by Contractor pursuant to this Agreement. These certificates shall specify or be endorsed to provide that thirty (30) days' notice must be given, in writing, to County of any pending change in the limits of liability or of any cancellation or modification of the policy.

b. Workers' Compensation and Employer's Liability Insurance

Contractor shall have in effect during the entire term of this Agreement workers' compensation and employer's liability insurance providing full statutory coverage. In signing this Agreement, Contractor certifies, as required by Section 1861 of the California Labor Code, that (a) it is aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code, and (b) it will comply with such provisions before commencing the performance of work under this Agreement.

c. Liability Insurance

Contractor shall take out and maintain during the term of this Agreement such bodily injury liability and property damage liability insurance as shall protect Contractor and all of its employees/officers/agents while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage which may arise from Contractor's operations under this Agreement, whether such operations be by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or an agent of either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall not be less than the amounts specified below:

- (a) Comprehensive General Liability... \$1,000,000
- (b) Motor Vehicle Liability Insurance... \$1,000,000
- (c) Professional Liability..... \$1,000,000

County and its officers, agents, employees, and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that (a) the insurance afforded thereby to County and its officers, agents, employees, and servants shall be primary insurance to the full limits of liability of the policy and (b) if the County or its officers, agents, employees, and servants have other insurance against the loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this Section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, County, at its option, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work and payment pursuant to this Agreement.

11. Compliance With Laws

All services to be performed by Contractor pursuant to this Agreement shall be performed in accordance with all applicable Federal, State, County, and municipal laws, ordinances, and regulations, including but not limited to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the Federal Regulations promulgated thereunder, as amended (if applicable), the Business Associate requirements set forth in Attachment H (if attached), the Americans with Disabilities Act of 1990, as amended, and Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination on the basis of disability in programs and activities receiving any Federal or County financial assistance. Such services shall also be performed in accordance with all applicable ordinances and regulations, including but not limited to appropriate licensure, certification regulations, provisions pertaining to confidentiality of records, and applicable quality assurance regulations. In the event of a conflict between the terms of this Agreement and any applicable State, Federal, County, or municipal law or regulation, the requirements of the applicable law or regulation will take precedence over the requirements set forth in this Agreement.

Further, Contractor certifies that it and all of its subcontractors will adhere to all applicable provisions of Chapter 4.107 of the San Mateo County Ordinance Code, which regulates the use of disposable food service ware. Accordingly, Contractor shall not use any non-recyclable plastic disposable food service ware when providing prepared food on property owned or leased by the County and instead shall use biodegradable, compostable, reusable, or recyclable plastic food service ware on property owned or leased by the County.

Contractor will timely and accurately complete, sign, and submit all necessary documentation of compliance.

12. Non-Discrimination and Other Requirements

a. General Non-discrimination

No person shall be denied any services provided pursuant to this Agreement (except as limited by the scope of services) on the grounds of race, color, national origin, ancestry, age, disability (physical or mental), sex, sexual orientation, gender identity, marital or domestic partner status, religion, political

beliefs or affiliation, familial or parental status (including pregnancy), medical condition (cancer-related), military service, or genetic information.

b. Equal Employment Opportunity

Contractor shall ensure equal employment opportunity based on objective standards of recruitment, classification, selection, promotion, compensation, performance evaluation, and management relations for all employees under this Agreement. Contractor's equal employment policies shall be made available to County upon request.

c. Section 504 of the Rehabilitation Act of 1973

Contractor shall comply with Section 504 of the Rehabilitation Act of 1973, as amended, which provides that no otherwise qualified individual with a disability shall, solely by reason of a disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in the performance of any services this Agreement. This Section applies only to contractors who are providing services to members of the public under this Agreement.

d. Compliance with County's Equal Benefits Ordinance

Contractor shall comply with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor's employee is of the same or opposite sex as the employee.

e. Discrimination Against Individuals with Disabilities

The nondiscrimination requirements of 41 C.F.R. 60-741.5(a) are incorporated into this Agreement as if fully set forth here, and Contractor and any subcontractor shall abide by the requirements of 41 C.F.R. 60-741.5(a). This regulation prohibits discrimination against qualified individuals on the basis of disability and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.

f. History of Discrimination

Contractor certifies that no finding of discrimination has been issued in the past 365 days against Contractor by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other investigative entity. If any finding(s) of discrimination have been issued against Contractor within the past 365 days by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or other investigative entity, Contractor shall provide County with a written explanation of the outcome(s) or remedy for the discrimination prior to execution of this Agreement. Failure to comply with this Section shall constitute a material breach of this Agreement and subjects the Agreement to immediate termination at the sole option of the County.

g. Reporting: Violation of Non-discrimination Provisions

Contractor shall report to the County Manager the filing in any court or with any administrative agency of any complaint or allegation of discrimination on any of the bases prohibited by this Section of the Agreement or the Section titled "Compliance with Laws". Such duty shall include reporting of the filing of any and all charges with the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other entity charged with the investigation or adjudication of

allegations covered by this subsection within 30 days of such filing, provided that within such 30 days such entity has not notified Contractor that such charges are dismissed or otherwise unfounded. Such notification shall include a general description of the circumstances involved and a general description of the kind of discrimination alleged (for example, gender-, sexual orientation-, religion-, or race-based discrimination).

Violation of the non-discrimination provisions of this Agreement shall be considered a breach of this Agreement and subject the Contractor to penalties, to be determined by the County Manager, including but not limited to the following:

- i. termination of this Agreement;
- ii. disqualification of the Contractor from being considered for or being awarded a County contract for a period of up to 3 years;
- iii. liquidated damages of \$2,500 per violation; and/or
- iv. imposition of other appropriate contractual and civil remedies and sanctions, as determined by the County Manager.

To effectuate the provisions of this Section, the County Manager shall have the authority to offset all or any portion of the amount described in this Section against amounts due to Contractor under this Agreement or any other agreement between Contractor and County.

h. Compliance with Living Wage Ordinance

As required by Chapter 2.88 of the San Mateo County Ordinance Code, Contractor certifies all contractor(s) and subcontractor(s) obligated under this contract shall fully comply with the provisions of the County of San Mateo Living Wage Ordinance, including, but not limited to, paying all Covered Employees the current Living Wage and providing notice to all Covered Employees and Subcontractors as required under the Ordinance.

Compliance with County Employee Jury Service Ordinance

Contractor shall comply with Chapter 2.85 of the County's Ordinance Code, which states that Contractor shall have and adhere to a written policy providing that its employees, to the extent they are full-time employees and live in San Mateo County, shall receive from the Contractor, on an annual basis, no fewer than five days of regular pay for jury service in San Mateo County, with jury pay being provided only for each day of actual jury service. The policy may provide that such employees deposit any fees received for such jury service with Contractor or that the Contractor may deduct from an employee's regular pay the fees received for jury service in San Mateo County. By signing this Agreement, Contractor certifies that it has and adheres to a policy consistent with Chapter 2.85. For purposes of this Section, if Contractor has no employees in San Mateo County, it is sufficient for Contractor to provide the following written statement to County: "For purposes of San Mateo County's jury service ordinance, Contractor certifies that it has no full-time employees who live in San Mateo County. To the extent that it hires any such employees during the term of its Agreement with San Mateo County, Contractor shall adopt a policy that complies with Chapter 2.85 of the County's Ordinance Code." The requirements of Chapter 2.85 do not apply unless this Agreement's total value listed in the Section titled "Payments", exceeds two-hundred thousand dollars (\$200,000); Contractor acknowledges that Chapter 2.85's requirements will apply if this Agreement is amended such that its total value exceeds that threshold amount.

13. Retention of Records: Right to Monitor and Audit

(a) Contractor shall maintain all required records relating to services provided under this Agreement for three (3) years after County makes final payment and all other pending matters are closed, and Contractor shall be subject to the examination and/or audit by County, a Federal grantor agency, and the State of California.

(b) Contractor shall comply with all program and fiscal reporting requirements set forth by applicable Federal, State, and local agencies and as required by County.

(c) Contractor agrees upon reasonable notice to provide to County, to any Federal or State department having monitoring or review authority, to County's authorized representative, and/or to any of their respective audit agencies access to and the right to examine all records and documents necessary to determine compliance with relevant Federal, State, and local statutes, rules, and regulations, to determine compliance with this Agreement, and to evaluate the quality, appropriateness, and timeliness of services performed.

14. Merger Clause: Amendments

This Agreement, including the Exhibits and Attachments attached to this Agreement and incorporated by reference, constitutes the sole Agreement of the parties to this Agreement and correctly states the rights, duties, and obligations of each party as of this document's date. In the event that any term, condition, provision, requirement, or specification set forth in the body of this Agreement conflicts with or is inconsistent with any term, condition, provision, requirement, or specification in any Exhibit and/or Attachment to this Agreement, the provisions of the body of the Agreement shall prevail. Any prior agreement, promises, negotiations, or representations between the parties not expressly stated in this document are not binding. All subsequent modifications or amendments shall be in writing and signed by the parties.

15. Controlling Law: Venue

The validity of this Agreement and of its terms, the rights and duties of the parties under this Agreement, the interpretation of this Agreement, the performance of this Agreement, and any other dispute of any nature arising out of this Agreement shall be governed by the laws of the State of California without regard to its choice of law or conflict of law rules. Any dispute arising out of this Agreement shall be venued either in the San Mateo County Superior Court or in the United States District Court for the Northern District of California.

16. Notices

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when both: (1) transmitted via facsimile to the telephone number listed below or transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of County, to:

Name/Title: [insert]
Address: [insert]
Telephone: [insert]
Facsimile: [insert]
Email: [insert]

In the case of Contractor, to:

Name/Title: [insert]
Address: [insert]
Telephone: [insert]
Facsimile: [insert]
Email: [insert]

17. Electronic Signature

Both County and Contractor wish to permit this Agreement and future documents relating to this Agreement to be digitally signed in accordance with California law and County's Electronic Signature Administrative Memo. Any party to this Agreement may revoke such agreement to permit electronic signatures at any time in relation to all future documents by providing notice pursuant to this Agreement.

18. Payment of Permits/Licenses Contractor bears responsibility to obtain any license, permit, or approval required from any agency for work/services to be performed under this Agreement at Contractor's own expense prior to commencement of said work/services. Failure to do so will result in forfeit of any right to compensation under this Agreement.

19. Reimbursable Travel Expenses

To the extent that this Agreement authorizes reimbursements to Contractor for travel, lodging, and other related expenses as defined in this section, the Contractor must comply with all the terms of this section in order to be reimbursed for travel.

- a. Estimated travel expenses must be submitted to authorized County personnel for advanced written authorization before such expenses are incurred. Significant differences between estimated and actual travel expenses may be grounds for denial of full reimbursement of actual travel expenses.
- b. Itemized receipts (copies accepted) for all reimbursable travel expenses are required to be provided as supporting documentation with all invoices submitted to the County.
- c. Unless otherwise specified in this section, the County will reimburse Contractor for reimbursable travel expenses for days when services were provided to the County. Contractor must substantiate in writing to the County the actual services rendered and the specific dates. The County will reimburse for travel at 75% of the maximum reimbursement amount for the actual costs of meals and incidental expenses on the day preceding and/or the day following days when services were provided to the County, provided that such reimbursement is reasonable, in light of travel time and other relevant factors, and is approved in writing by authorized County personnel.

- d. Unless otherwise specified within the contract, reimbursable travel expenses shall not include Local Travel. "Local Travel" means travel entirely within a fifty-mile radius of the Contractor's office and travel entirely within a fifty-mile radius of San Mateo County. Any mileage reimbursements for a Contractor's use of a personal car for reimbursable travel shall be reimbursed based on the Federal mileage reimbursement rate.
- e. The maximum reimbursement amount for the actual lodging, meal and incidental expenses is limited to the then-current Continental United States ("CONUS") rate for the location of the work being done (i.e., Redwood City for work done in Redwood City, San Mateo for work done at San Mateo Medical Center) as set forth in the Code of Federal Regulations and as listed by the website of the U.S. General Services Administration (available online at <http://www.gsa.gov/portal/content/104877> or by searching www.gsa.gov for the term 'CONUS'). County policy limits the reimbursement of lodging in designated high cost of living metropolitan areas to a maximum of double the then-current CONUS rate; for work being done outside of a designated high cost of living metropolitan area, the maximum reimbursement amount for lodging is the then-current CONUS rate.
- f. The maximum reimbursement amount for the actual cost of airfare shall be limited to fares for Economy Class or below. Air travel fares will not be reimbursed for first class, business class, "economy-plus," or other such classes. Reimbursable car rental rates are restricted to the mid-level size range or below (i.e. standard size, intermediate, compact, or subcompact); costs for specialty, luxury, premium, SUV, or similar category vehicles are not reimbursable. Reimbursable ride-shares are restricted to standard or basic size vehicles (i.e., non-premium vehicles unless it results in a cost-saving to the County). Exceptions may be allowed under certain circumstances, such as unavailability of the foregoing options, with written approval from authorized County personnel. Other related travel expenses such as taxi fares, ride-shares, parking costs, train or subway costs, etc. shall be reimbursable on an actual-cost basis. Reimbursement of tips for taxi fare, or ride-share are limited to no more than 15% of the fare amount.
- g. Travel-related expenses are limited to: airfare, lodging, car rental, taxi/ride-share plus tips, tolls, incidentals (e.g. porters, baggage carriers or hotel staff), breakfast, lunch, dinner, mileage reimbursement based on Federal reimbursement rate. The County will not reimburse for alcohol.
- h. Reimbursement of tips are limited to no more than 15 percent. Non-reimbursement items (i.e., alcohol) shall be excluded when calculating the amount of the tip that is reimbursable.

20. **Prevailing Wage**

When applicable, Contractor hereby agrees to pay not less than prevailing rates of wages and be responsible for compliance with all the provisions of the California Labor Code, Article 2-Wages, Chapter 1, Part 7, Division 2, Section 1770 et seq. A copy of the prevailing wage scale established by the Department of Industrial Relations is on file in the office of the Director of Public Works, and available at www.dir.ca.gov/DLSR or by phone at 415-703-4774. California Labor Code Section 1776(a) requires each contractor and subcontractor keep accurate payroll records of trades workers on all public works projects and to submit copies of certified payroll records upon request.

Additionally,

- No contractor or subcontractor may be listed on a bid proposal for a public works project (submitted after March 1, 2015) unless registered with the Department of Industrial Relations pursuant to Labor.

Code section 1725.5 [with limited exceptions from this requirement for bid purposes only under Labor Code section 1771.1(a)].

- No contractor or subcontractor may be awarded a contract for public work on a public works project (awarded on or after April 1, 2015) unless registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5.
- This project is subject to compliance monitoring and enforcement by the Department of Industrial Relations

* * *

THIS CONTRACT IS NOT VALID UNTIL SIGNED BY ALL PARTIES. NO WORK WILL COMMENCE UNTIL THIS DOCUMENT HAS BEEN SIGNED BY THE COUNTY PURCHASING AGENT OR AUTHORIZED DESIGNEE.

For Contractor:

Contractor Signature

Date

Contractor Name (please print)



For County:

Purchasing Agent Signature
(Department Head or
Authorized Designee)
County of San Mateo

Date

Purchasing Agent Name (please print)
(Department Head or **Authorized** Designee)
County of San Mateo

Purchasing Agent or **Authorized** Designee
Job Title (please print)
County of San Mateo

Exhibit A

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

Exhibit B

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

Attachment 1

DISEASE PREVENTION AND HEALTH PROMOTION PROGRAM STANDARDS AND WORKPLAN GUIDELINES

Program Goal

The goal of the Older Americans Act (OAA) Title IIID Disease Prevention and Health Promotion program is to provide evidence-based programs to improve health and well-being and reduce disease and injury among older Americans.

The ideal contractor for the Disease Prevention and Health Promotion Program will serve multiple municipalities within the County.

Program Service Description

Title III D (Disease Prevention and Health Promotion Programs) are based on scientific evidence and demonstrated through rigorous evaluation to be effective in improving the health of older adults. Title III D evidence-based programs include programs related to the prevention and mitigation of the effects of chronic diseases (including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), infectious disease, and vaccine-preventable disease, and prevention of sexually transmitted diseases. Evidence-based services also include programs focused on alcohol and substance abuse reduction, chronic pain management, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. [OAA 102 (14)(D)]

The program funded through this RFP requires a behavioral health component that can address mental health needs and help address social isolation and loneliness.

Individuals can participate in services offered from a variety of settings including multipurpose senior centers, community center, congregate nutrition sites, and in their homes.

Pre-Approved Evidence Based Programs

The link below provides information on pre-approved evidence-based programs. One example is PEARLS but proposer may choose any evidence-based program for older adults, including those that are on the National Council on Aging's website with an X in the Behavioral Health column or any other evidence based program prove that it's an evidence-based behavioral health program based on this criteria outlined in the Administration of Community Living: <https://acl.gov/programs/health-wellness/disease-prevention#future>. In that case, applicants must submit evidence-based documentation. The service delivery model will depend on the evidence-based program chosen.

<https://www.ncoa.org/evidence-based-programs>

Eligibility Specifics

Eligible Service Population for Title III D means individuals 60 years of age or older, with emphasis on those in greatest economic and social need with particular attention to low income minority older individuals, older individuals with Limited English Proficiency (LEP), and older individuals residing in rural areas. [OAA § 305 (a)(2)(E), 22 CCR 7125, 7127, 7130, 7135 and 7638.7].

Projected Annual Funding Available:

OAA Title III D funds for Health Promotion - \$150,000

Unit of service: One (1) contact

Minimum Units of Service Range: 100-150

Program Service Requirements

Program Requirements means Title III D program requirements found in the

- Older Americans Act (OAA) 42, (USC section 3001-3058) http://www.aoa.gov/AoA_Programs/OAA/index.aspx
- Older Californians Act [download.ashx \(ca.gov\)](#);
- Code of Federal Regulations (CFR) (45 CFR XIII, 1321)
- Title 22, California Code of Regulations (22 CCR 7000 et seq)
- California Department of Aging (CDA) Program Memoranda
- CDA Title III Program Manual
- Occupational Safety and Health Administration (OSHA) requirements;
- Current Dietary Guidelines for Americans (DGA)
- California Retail Food Code (CRFC) [SB 144 Senate Bill – CHAPTERED BILLNUMBER: SB 144 \(ca.gov\)](#)
- San Mateo County Health policies and procedures

1. Title III D funding may be used only for programs and activities which have been demonstrated to be evidence-based and that:
 - a. Have Undergone Experimental or Quasi-Experimental Design.
 - b. Operate at a level at which full translation has occurred in a community site. For purposes of the Title III-D definitions, being “fully translated in one or more community sites” means that the evidence-based program in question has been carried out at the community level (with fidelity to the published research) at least once before. Sites should only consider programs that have been shown to be effective within a real world community setting.
 - c. Disseminate products have been developed and are available to the public.
2. Health Promotion means:

- a. Health risk assessments;
- b. Routine health screening which may include hypertension, glaucoma, cholesterol, cancer, vision, hearing, diabetes, bone density, and nutrition screening;
- c. Nutritional counseling and educational services for individuals and their primary caregivers;
- d. Evidence-based health promotion programs (including programs related to the prevention and mitigation of the effects of chronic disease including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity and improved nutrition;
- e. Programs regarding physical fitness, group exercise, music therapy, art therapy, and dance-movement therapy including programs for multigenerational participation that are provided by:
 - (1) an institution of higher education;
 - (2) a local educational agency, as defined in section 14101 of the Elementary and Secondary Education Act of 1965 (20 USC 8801); or
 - (3) a community-based organization;
- f. Home injury control services, including screening of high-risk home environments and provision of educational programs on injury prevention (including fall and fracture prevention) in the home environment;
- g. Screening for the prevention of depression, coordination of community mental health services, provision of educational activities and referral to psychiatric and psychological services;
- h. Educational programs on the availability, benefits, and appropriate use of preventive health services covered under title XVIII of the Social Security Act [42 USC § 1395, et seq];
- i. Medication management screening and education to prevent incorrect medication and adverse drug reactions;
- j. Information concerning diagnosis, prevention, treatment and rehabilitation concerning age-related diseases and chronic disabling conditions, including osteoporosis, cardiovascular diseases, diabetes, and Alzheimer's disease and related disorders with neurological and organic brain dysfunction;
- k. Gerontological counseling;
- l. Counseling regarding social services and follow up health services based on any of the services described in subparagraphs (a) through (k). The term shall not include services for which payment may be made under titles XVIII and XIX of the Social Security Act [42 USC §§ 1395, et seq and 1396, et seq]; and
- m. The following resources provide additional information and resources for implementing evidenced-based programs:
 - The National Council on Aging: <https://www.ncoa.org/evidence-based-programs>

- The AoA Title III D evidence-based criteria and examples:
<https://acl.gov/programs/health-wellness/disease-prevention#:~:text=Title%20III%2DD%20of%20the,lifestyles%20and%20promote%20healthy%20behaviors>
 - The CDA list of resources for evidence-based programs:
https://aging.ca.gov/Providers_and_Partners/Area_Agencies_on_Aging/Disease_Prevention_and_Health_Promotion/
 - Area Plan Guidance and Requirements can be found at:
<http://www.aging.ca.gov/ProgramsProviders/AAA/Planning/> .
3. Coordination and Outreach: Providers are expected to coordinate with AAS and other community-based providers to ensure consistency and continuity in the continuum of services. These efforts should be a part of the agency's outreach plan.
 4. Contractor assures that voluntary contributions shall be allowed and may be solicited in accordance with the following requirements: [OAA § 315(b)]:
 - a. Means tests shall not be used by any contractor for any Title III or Title VII Services;
 - b. Services shall not be denied to any Title III or Title VII client that does not contribute toward the cost of the services received;
 - c. Methods used to solicit voluntary contributions for Title III and Title VII services shall be non-coercive;
 - d. Each service provider will:
 - (1) Provide each recipient with an opportunity to voluntarily contribute to the cost of the service;
 - (2) Clearly inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary;
 - (3) Protect the privacy and confidentiality of each recipient with respect to the recipient's contribution or lack of contribution;
 - (4) Establish appropriate procedures to safeguard and account for all contributions;
 - (5) Donation letters may not resemble a bill or a statement [OAA § 315(b)];
 - (6) Individual client's donations shall not be tracked by accounts receivable [OAA § 315(b)(4)(C)];
 5. Any Title III and Title VII service shall not implement a Cost Sharing program unless so notified by the County;
 6. Proof of age, citizenship, or disability shall not be required as a condition of receiving services;
 7. An individual's receipt of services under the In-Home Supportive Services Program shall not be the sole cause for denial of any services provided by the AAA or its contractors.

8. Data Reporting. Monthly, quarterly, and annual reports of data including units of service, client counts, demographics and other data as required by Aging and Adult Services (AAS) and/or the CDA will be expected to be completed and submitted in a timely manner on required forms.
9. Program Changes. AAS shall be notified in writing and approve of (at least thirty (30) days in advance of implementation) any plan for change in the service resulting from the relocation of a facility, a route change or termination, reducing the number of service days and hours of operation or change in staff.
10. Contractor agrees to offer services throughout the twelve-month contract period, unless prior written approval is received from AAS.
11. Utilize appropriate verbiage in written materials (such as newsletters, menus, newspapers, websites, flyers, publications, etc.) by avoiding the use of language that implies a price or fees for service.
12. Contractor shall agree to distribute any needs assessment(s) or feedback surveys provided by the County. Surveys are to be returned to the County for data collection and analysis.
13. Contractor agrees to participate in the monitoring of the use of federal, State, and County funds. Onsite program monitoring will be conducted every two years for all programs except Title IIIC1 and Title IIIC2, which must be conducted every year. Onsite fiscal monitoring must be conducted every two years for all programs including Titles IIIC1 and C2.
14. Program monitoring may occur more frequently if determined by AAS as beneficial to the integrity of program requirement compliance. Contractor agrees to provide requested programmatic and administrative documentation and the availability of key staff as part of the contract monitoring process.
15. Ensure that all outreach materials, websites, and publicity regarding the program shall attribute partial funding from the Older Americans Act and County of San Mateo.

Attachment 2

Older Americans Act (OAA) Services for Aging & Adult Services

IIID Disease Prevention and Health Promotion

Program

Proposal Submitted By: _____

TAB 1 Qualifications and Experience:

1). Agency Background and Experience:

- A. State the mission of your agency or organization and describe all current programs you provide.
- B. Describe your clientele and geographic area served.
- C. Indicate how long the programs have been operating and how they are funded.
- D. Indicate if any of these programs are currently operating under contract with San Mateo County.

Proposer's Response:

2). Staffing/Volunteers:

- A. Provide an organizational chart for your agency.
- B. Detail your staffing plan and include job descriptions and licenses (if applicable) for key personnel and volunteers.
- C. Describe your use of trained volunteers.
- D. Indicate the responsible person(s) for managing day-to-day operations including the completion of the Client Intake forms, daily service delivery aspects of the program, and the weekly and monthly program reporting requirements.
- E. Describe how you will meet staffing requirements when there are vacancies, illnesses, or other personnel challenges.
- F. If applicable, list the professional qualifications for each individual who would be assigned to provide services requested in this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae (CV) for each such individual if the resume/CV includes all the requested information.

Proposer's Response:

3). Service to Targeted Populations and Linguistic Access:

- A. Describe your ability to serve individuals within the target populations described in the General Information section.

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

- B. Indicate the level of funding for which you are applying based on your proposed target population and indicate the city or cities to be served.
- C. How many full time employees (FTEs) do you plan to assign to this project, if you are selected?
- D. Identify languages in which clients will be able to access your services.
- E. Indicate staff capacity to meet the needs of the diverse racial/ethnic groups within your community.

Proposer's Response:

4). Facility Site:

- A. Describe the location and size of the facility, equipment available, and accessibility of the building.
- B. Describe the safeguards which will be used to ensure the participants' safety related to exits, outdoor space, storage areas, glass patio doors, stairs or steps, passenger loading zones, kitchen, and bathrooms.
- C. Describe emergency evacuation plans.
- D. List name and address of each location, capacity at each, days and hours of operation, and anticipated daily attendance.

Proposer's Response:

5). Emergency Preparedness Plans: Describe your Emergency Operations Plan.

Proposer's Response:

6) Contingency Plans:

- A. Describe your contingency plans in the event that the full amount you are requesting from AAS is not received.
- B. Describe potential sources of funding, short-term and long-term, for the program and any fundraising capabilities.

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 2 Philosophy and Service Model:

This section describes your philosophy and service model for providing the services required. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (including planning for absences and back-up coverage, training, background checks, and staff monitoring, etc.), and equipment or other resources provided by you (if applicable).

1. Proposed Service/Ability to Meet Program Requirements:

Identify which evidenced-based program(s) under IIID Health Promotion you are proposing to offer for Health Promotion and how you measure its success. (i.e., prevention and mitigation of effects of chronic disease, substance abuse reduction, weight loss and control, fall prevention, etc.). Please note that the program you choose must have a behavioral health component that can address mental health needs and help address social isolation and loneliness.

- A. Summarize your proposed service model providing detail about how it will function and meet the requirements of the program.
- B. List any items that you cannot provide and how you will meet the requirements.
- C. Provide information on any other pertinent services, if any, to reduce costs for the County.

Proposer's Response:

2. Coordination:

- A. Identify and detail how you will work with other agencies providing similar services or serving the same population.
- B. Describe your procedure for documenting referrals to and/or utilization of other community-based services that support participants and their families.

Proposer's Response:

3. Outreach:

Describe your outreach plan, particularly to clients who may be monolingual, isolated, and/or unaware of your services. Include how you plan to work with key agencies/organizations that could refer clients to your program.

(Activities may include, but are not limited to, presentations to appropriate groups in the community, printed flyers and brochures about program offerings, and information sharing with other service providers).

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

4. Documentation: Describe your procedure for documenting contact and follow-up inquiries about your program.

Proposer's Response:

5. Data Reporting:

- A. Describe how your agency will capture and report required program data.
- B. Describe how your agency protects the privacy of client level data (e.g. encryption, etc.)
- C. Describe how your agency will meet the due date for program reports (10th working day of the month following the month of service).

Proposer's Response:

6. Training:

- D. Describe staff training on-site and at other locations that address issues of concern to program participants (e.g. emergency preparedness and/or food safety and sanitation).
- E. Include who will conduct trainings, how often they will occur, proposed topics, and frequency of staff training or continuing education opportunities.

Proposer's Response:

7. Cultural Competence:

Describe how your agency/program will ensure cultural competence. This may include culturally relevant program features, staffing objectives that reflect cultural and linguistic diversity, and education materials that value the cultural diversity of San Mateo County.

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

Proposer's Response:

8. Collaborative Service Planning:

- 1) Describe your involvement in the planning and development of a community-wide system of services.
- 2) Give an example of a program in which you collaborated with other agencies to enhance the service-delivery system for seniors and people with disabilities.
- 3) Identify any County committees or coalitions in which you have been involved.

Proposer's Response:

9. Master Plan for Aging:

In June 2019, Governor Gavin Newsom issued an executive order calling for the creation of a Master Plan for Aging (Master Plan) ([Executive Order N-14-19](#)). The Executive Order affirmed the priority of the health and well-being of older Californians and the need for policies that promote healthy aging. A link to the MPA follows:

<https://www.aging.ca.gov/download.ashx?IE0rcNUV0zYXf9JtT7jkAg%3d%3d>

Describe how your agency/program is including the MPA in your current/future planning efforts.

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 3 Customer Service and Program Evaluation:

1. Customer Service:

- A. How will your services meet the needs of County participants and/or the public?
- B. In the event of a routine problem, who is to be contacted within your organization?
- C. In the event of the identification of a problem by the County, its clients/families and /or other applicable constituents, describe how you will address such problems and the timeframe for addressing them.

Proposer's Response:

2. Program Evaluation/Client Satisfaction:

- A. Describe your method(s) for evaluating your program's performance including the distribution of customer feedback surveys which will be provided by County and returned to the County for data collection and analysis.
- B. Describe how you will collect information from your clients about their perception of your program and its effectiveness.
- C. Describe your Quality Improvement Plan.

Proposer's Response:

3. Service Area:

Are there any regions or cities in San Mateo County where you are unable to provide service?

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 4 Claims, Licensure, Non-Discrimination, and Health Insurance Portability and Accountability Act (HIPAA) Violations Against Your Organization:

- 1) List any current licensure, HIPAA, non-discrimination claims against you/your organization and those having occurred in the past five years, especially any resulting in claims or legal judgments against you.

Proposer's Response:

TAB 5 Cooperative Purchasing:

- 1) State whether your contract with Aging and Adult Services can be extended to other San Mateo County departments and/or public agencies in the San Francisco Bay Area upon their request. Your response to this inquiry will not affect the selection decision unless all other factors are deemed to be equal by the County.

Proposer's Response:

- 2) List any additional services that may be necessary, if any, and the proposed costs for such services. Please indicate if any of these costs are separately billable, i.e., not included within the services included under the contract.

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 6 References:

- 1) List at least three client references for whom you have recently provided similar services. Include contact names, titles, phone numbers, and e-mail addresses for all references provided.

Proposer's Response:

Name	Title	E-Mail	Phone #	Relation

- 2) Provide at least three peer references in your industry who can attest to your experience, reputation, knowledge, and verify the contents of your application. Include names, titles, e-mail addresses, and phone numbers for these individuals.

Proposer's Response:

Name	Title	E-Mail	Phone #	Relation

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 7 Statement of Compliance with County Contractual Requirements:

Each proposal must include a statement of the proposer's commitment and ability to comply with each of the terms of the County's standard contract, including but not limited to the following:

- 1) The County non-discrimination policy
- 2) The County equal employment opportunity requirements
- 3) County requirements regarding employee benefits
- 4) The County jury service pay ordinance
- 5) The hold harmless provision
- 6) County insurance requirements
- 7) The County Living Wage Ordinance
- 8) All other provisions of the standard contract

In addition, the proposer should include a statement that it will agree to have any disputes regarding the contract venued in San Mateo County or the Northern District of California.

Proposer's Response:

The proposal must state any objections to any terms in the County's contract template and provide an explanation for the inability to comply with the required term(s). If no objections are stated, the County will assume the proposer is prepared to sign the County standard contract template as provided.

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

TAB 8 Services and Cost (Fiscal):

1) Fiscal Staff:

- A). Define the fiscal staffing positions that will be responsible for this program. Include job description(s).
- B). Describe your record-keeping and fiscal management systems in detail.

Proposer's Response:

2) Budget: submit a detailed budget and budget narrative in which line items are identified as yearly or contract period costs and unit of service costs, as appropriate.

- A). Provide a detailed explanation for all costs associated with your providing the requested services if you are selected.
- B). Provide a detailed budget and budget narrative (with line items identified for one year contract) for primary services for your proposed program. Refer to the Fiscal- Budget Standards and the excel budget template (to be filled out).

3) Financial Statement:

- A). Attach an audited financial statement completed within the last twelve months.
- B). If an audited financial statement is not available, include alternative audit procedures you will use.

Proposer's Response:

Older Americans Act (OAA) Services for Aging & Adult Services

Proposal Submitted By: _____

6) UEI (Unique Entity ID) Number and Federal Debarment:

UEI is a 12-character alphanumeric ID assigned to an entity by SAM.gov on April 4, 2022. As part of this transition, the DUNS number has been removed from SAM.gov and entity registration, searching, and data entry in SAM.gov now require use of the new Unique Entity ID.

Does your agency already have a UEI number and is it registered with SAM.gov?
Has your agency ever had any exclusions for receiving Federal Awards?

Proposer's Response:

7) Contributions/Project Income (if applicable):

A. Describe your agency's project income policies and procedures on setting the suggested client contribution level and guest meal cost; protecting the voluntary, anonymous contributions of your clients; handling the daily income from clients and guests; and contingency plans for securing additional revenue if proposed income level is not achieved.

B. Describe how you would use any income in excess of the budgeted amount.

Proposer's Response:

Poverty Guidelines for Older Americans Act and Older Californians Act Programs

Updated: February 2021

The purpose of this document is to provide a convenient place for Area Agencies on Aging (AAA) and their service providers to find information on poverty guidelines for Older Americans Act (OAA) programs. Various programs use the guidelines for eligibility criteria, targeting, and or/reporting purposes. Table A, along with the Individual Program Eligibility criteria, provide the most current poverty guidelines available. It is the AAA's responsibility to implement program eligibility criteria updates in accordance with the information provided.

The Federal Poverty Guidelines (FPG) are updated periodically in the Federal Register by the United States Department of Health and Human Services (HHS), under the authority of 42 U.S.C. 9902(2). On January 13, 2021, HHS published the new 2021 poverty guidelines.

Please provide the eligibility, reporting, and targeting requirements to the applicable service providers to ensure program compliance. Inquiries may be directed to the CDA Data Team at DataTeam.Reports@aging.ca.gov.

PROGRAMS

OAA Title III Programs shall use the FPG for targeting and reporting purposes. These programs do not have income eligibility requirements for participation. The AAAs shall consider the needs of individuals at or below 100 percent of the FPG in targeting services. Services shall be targeted to those with the greatest social and economic need with particular attention to low-income minority individuals, as set forth in the California Code of Regulations (CCR), Title 22, Division 1.8, Chapter 3, Article 3, Section 7310.

Senior Community Service Employment Program (SCSEP) Title V shall use 125 percent of the FPG for eligibility criteria and reporting purposes. For additional information, refer to the United States Department of Labor, Employment and Training Administration Advisory System at <http://www.doleta.gov/seniors>.

Health Insurance Counseling and Advocacy Program (HICAP) provides federal poverty level (FPL) information to beneficiaries and their representatives for referral and assistance to other programs, as needed.

TABLE – A

Program	Title III OAA	Title V SCSEP
Definition	100% FPG	125% FPG
Purpose	Targeting & Reporting	Eligibility & Reporting
Reference	OAA, Title I Sec. 102(a)(23) CCR, Title 22, Sec. 7310(a)(1)	OAA, Title V Sec. 518(a)(3)(A)
Annual Amount for 1 Person in Family or Household	\$12,880	\$16,090
Annual Amount for 2 Persons in Family or Household	\$17,420	\$21,770
Annual Amount for 3 Persons in Family or Household	\$21,960	\$27,450
Annual Amount for 4 Persons in Family or Household	\$26,500	\$33,130
Annual Amount for 5 Persons in Family or Household	\$31,040	\$38,810
Annual Amount for 6 Persons in Family or Household	\$35,580	\$44,490
Annual Amount for 7 Persons in Family or Household	\$40,120	\$50,170
Annual Amount for 8 Persons in Family or Household	\$44,660	\$55,850
For each additional person, add	\$4,540	\$5,680
Last Update	Jan 2021	Jan 2021

SOURCE: *Federal Register*, Vol.86, No.19, January 13, 2021, 7732-7734
<https://www.federalregister.gov/documents/2023/01/19/2023-00885/annual-update-of-the-hhs-poverty-guidelines>

CARS (CA-GetCare) File Specifications

Last Revised: 08/01/2021

Instructions: Each section represents a separate tab delimited flat file (seven total). Respond to each data element in order. Most fields have defined values to ensure consistency (please see the worksheet labeled "Lookup Tables" for these values). No blank values should be submitted, unless explicitly allowed per these specifications. To reduce file errors and rejections, we request that AAAs not include any labels in the data file (i.e. headers such as "Participant ID", "Birth Date", "First Enrollment Date", etc.). Submitted client identifiers will be stored in an encrypted database and will not be accessible by any CDA staff.

Cumulative Submission Rule: AAAs should submit cumulative data with each submission as follows:

The first submission will contain Q1 data.

The second submission will contain Q1 and Q2 data.

The third submission will contain Q1, Q2, and Q3 data.

The fourth (and final) submission will contain Q1, Q2, Q3, and Q4 data (i.e. data for the entire fiscal year).

Note: This cumulative submission process will allow you to correct previously submitted data without adjusting old files. For example, if you realize that your first submission omitted 10 home delivered meals, simply include these counts in your second submission. The CARS system will automatically adjust Q1 numbers accordingly.

Ten Day Approval Rule: Once an Area Agency on Aging receives notification that their submission has "passed," they will have 10 working days to review and approve a summary of their data in the CARS system. If a AAA does not approve their submission within 10 working days, CDA will have the option to view these data. **Note:** If you realize that you uploaded incomplete and/or incorrect data that does not match the information in your local software, please make any necessary corrections to your files and resubmit them within 10 working days from the original submission. If you know that the data uploaded do not reflect actual service and/or client counts (for example, due to a contracted provider not collecting one or more required data elements) but does accurately reflect all available information, "approve" your data as usual but note this discrepancy in the "comments" box.

Client/Caregiver File*

Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Participant ID	Required by System	R:RegSrvsFCSP **	INTEGER	Unique identifier for each participant assigned by your system.
First Name	Required by System	Optional **	TEXT	
Last Name	Required by System	Optional **	TEXT	
Middle Name	Required by System	Optional **	TEXT	
Birth Date	Required by System	R:RegSrvsFCSP **	YYYY-MM-DD	When missing, submit value of "0000-00-00" or "0" for this field.
Social Security Number	Required by System	Optional **	TEXT, ###-##-####	If only last four digits are recorded, enter xxx-xx-####
Address Line 1	Required by System	Optional **	TEXT	
Address Line 2	Required by System	Optional **	TEXT	
City	Required by System	Optional **	TEXT	
Zip code	Required by System	R:RegSrvsFCSP **	##### or #####-####	
Home Phone Number	Required by System	Optional **	(###)###-####E	# for numbers, E for extension
Other Phone Number	Required by System	Optional **	(###)###-####E	# for numbers, E for extension
Rural Designation***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col A,B
Sex at Birth***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col C,D
Gender***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col E, F
Gender not listed, specify	Situational	Optional **	TEXT	Answer is required if Gender = 6.
Sexual Orientation***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col G,H
Sexual Orientation not listed, specify	Situational	Optional **	TEXT	Answer is required if Sexual Orientation = 5.
Race***	Required by System	R:RegSrvsFCSP **	MULTI-SELECT TEXT, Race1; Race2; Race3;(1,2,4)	Refer to Lookup Tables Sheet Col I,J
Ethnicity***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col K,L
Poverty Status***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col M,N
Living Arrangement***	Required by System	R:RegSrvsFCSP **	INTEGER	Refer to Lookup Tables Sheet Col O,P
Employment Status***	Required by System	R:FCSP Only **	INTEGER	Refer to Lookup Tables Sheet Col Q,R
Relationship Status***	Required by System	R:FCSP Only **	INTEGER	Refer to Lookup Tables Sheet Col S,T
ADL: Eating***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
ADL: Bathing***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
ADL: Toileting***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
ADL: Transferring in/out of bed/chair ***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
ADL: Walking***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
ADL: Dressing***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z

CARS (CA-GetCare) File Specifications

Last Revised: 08/01/2021

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ADL: Grooming***	Required by System	MSSP	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Meal Preparation***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Shopping***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Medication Management***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Money Management***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Using Telephone***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Heavy Housework***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Light Housework***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Transportation***	Required by System	R:RegSrvs Cluster 1 **	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Stair Climbing***	Required by System	MSSP	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Mobility Indoors***	Required by System	MSSP	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Mobility Outdoors***	Required by System	MSSP	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
IADL: Laundry***	Required by System	MSSP	INTEGER	Refer to Lookup Tables Sheet Col Y,Z
Person at Nutritional Risk***	Required by System	R:CsM, HDM, CgM, NC****	INTEGER	Refer to Lookup Tables Sheet Col AA,AB

* CLIENT means an individual receiving AAA services with Title III B-D, VII b funds. Client also means a CARE RECEIVER whose Caregiver receives AAA services with Title III E funds. CAREGIVER means an individual receiving AAA services with Title III E funds.

** For CAREGIVER/CARE RECEIVER ADL/IADL and other requirements see: FCSP REFERENCE GUIDE WORKSHEET.

*** REFER TO LOOKUP TABLE 1

**** PERSON AT NUTRITIONAL RISK: Case Management (CsM), Home Delivered Meals (HDM), Congregate Meals (CgM), and Nutritional Counseling (NC).

Key:

R = Required

RegSrvs = Registered NAPIS Services

FCSP = Family Caregiver Support Program

SUM = Summary Data per NAPIS, no ADL/IADLs

CARS (CA-GetCare) File Specifications

Last Revised: 08/01/2021

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Cumulative Submission Rule: AAAs should submit cumulative data with each submission as follows:

The first submission will contain Q1 data.

The second submission will contain Q1 and Q2 data.

The third submission will contain Q1, Q2, and Q3 data.

The fourth (and final) submission will contain Q1, Q2, Q3, and Q4 data (i.e. data for the entire fiscal year).

Note: This cumulative submission process will allow you to correct previously submitted data without adjusting old files. For example, if you realize that your first submission omitted 10 home delivered meals, simply include these counts in your second submission. The CARS system will automatically adjust Q1 numbers accordingly.

Ten Day Approval Rule: Once an Area Agency on Aging receives notification that their submission has "passed," they will have 10 working days to review and approve a summary of their data in the CARS system. If a AAA does not approve their submission within 10 working days, CDA will have the option to view these data. **Note:** If you realize that you uploaded incomplete and/or incorrect data that does not match the information in your local software, please make any necessary corrections to your files and resubmit them within 10 working days from the original submission. If you know that the data uploaded do not reflect actual service and/or client counts (for example, due to a contracted provider not collecting one or more required data elements) but does accurately reflect all available information, "approve" your data as usual but note this discrepancy in the "comments" box.

Enrollment File

Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Participant ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier for each participant assigned by your system. This should correspond to the Internal Participant ID from the Client File. If ID is missing, record will be discarded by system, with the exception of Non-Registered services.
Provider ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier (as assigned by your system) of the provider for which the units belong. This ID corresponds to the provider ID in the Service Provider File, Service Units File and Caregiver Relationship File (if reporting a caregiver).
Service ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier for each service delivered by each provider assigned by your system in which the participant is enrolled in the fiscal year. This ID corresponds to the Service ID in the Service Provider File, Service Units File, and Caregiver Relationship File (assigned to a CAREGIVER service).
First ever service date	Required by System	R-RegSrvsFCSP	YYYY-MM-DD	The very first time the participant enrolled in the service (e.g., John Smith first started receiving services from MoW HDM on 8/1/2004). This is the first ever service date. This is used to determine the number of new participants receiving services each year for NAPIS reporting.
First service current fiscal year	Required by System	R-RegSrvsFCSP	YYYY-MM-DD	The first service date for the participant in the current fiscal year for the specific service.
End service date/Deactivation date (if available)	Required by System	R-RegSrvsFCSP	YYYY-MM-DD	The date on which the participant stopped receiving a service from a provider in the current fiscal year. This is valid only for those participants that did not receive services throughout the entire fiscal year.
Reason for deactivation*	Required by System	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col AC,AD

* REFER TO LOOKUP TABLE 1

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NOTE:

Estimated Count of Client Served in Non-Registered services may be manually entered into CARS.

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Cumulative Submission Rule: AAAs should submit cumulative data with each submission as follows:

The first submission will contain Q1 data.

The second submission will contain Q1 and Q2 data.

The third submission will contain Q1, Q2, and Q3 data.

The fourth (and final) submission will contain Q1, Q2, Q3, and Q4 data (i.e. data for the entire fiscal year).

Note: This cumulative submission process will allow you to correct previously submitted data without adjusting old files. For example, if you realize that your first submission omitted 10 home delivered meals, simply include these counts in your second submission. The CARS system will automatically adjust Q1 numbers accordingly.

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Service Units File

Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Participant ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier for each participant assigned by your system. This should correspond to the Internal Participant ID from the Client file. If ID is missing, record will be discarded by system, with the exception of Non-Registered services. A NULL (i.e. blank) value is acceptable in this field when entering service units for non-registered services.
Provider ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier (as assigned by your system) of the provider for which the units belong. This ID corresponds to the provider ID in the Service Provider File, Enrollment File and Caregiver Relationship File (if reporting units for a caregiver).
Service ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier for each service delivered by each provider assigned by your system in which the participant is enrolled in the fiscal year. This ID corresponds to the Service ID in the Service Provider File, Enrollment File, and Caregiver Relationship File (assigned to a CAREGIVER service).
Reporting Month (reported quarterly, but by individual month)	Required by System	R-RegSrvsFCSP	INTEGER, 1-12	Month for which the service units are recorded
Reporting year	Required by System	R-RegSrvsFCSP	INTEGER, YYYY	Year for which the service units are recorded
Unit name*	Required by System	R-RegSrvsFCSP	TEXT	Specify unit of service from look-up Table AA (report hours as whole numbers only).
Quantity	Required by System	R-RegSrvsFCSP	INTEGER	Total units of service delivered to participant in the month/year indicated. When reporting services for Non-Registered services you may also manually enter aggregate units directly in CARS.

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Cumulative Submission Rule: AAAs should submit cumulative data with each submission as follows:

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Service-Provider File

Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Provider name	Required by System	R-RegSrvsFCSP	TEXT	Name of the provider offering the Title III-funded service in which the participant is enrolled in the fiscal year (e.g., Meals on Wheels)
Provider ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier (as assigned by your system) of the provider for which the units belong. This ID corresponds to the provider ID in the Enrollment File, Service Units File and Caregiver Relationship File (if reporting a caregiver).
Service name	Required by System	R-RegSrvsFCSP	TEXT	Name of the specific service offered by the provider (e.g., Meals on Wheels, Home Delivered Meals). Each service is specific to a service type.
Service ID	Required by System	R-RegSrvsFCSP	INTEGER	Unique identifier for each service delivered by each provider assigned by your system in which the participant is enrolled in the fiscal year. This ID corresponds to the Service ID in the Service Units File, Enrollment File, and Caregiver Relationship File (assigned to a CAREGIVER service).
Program Type ID*	Required by System	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col AE,AF
Minority Provider*	Required by system	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col U,V
Is AAA the Provider?*	Required by system	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col W,X
A senior center	Required by system	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col AN, AO
A focal point	Required by system	R-RegSrvsFCSP	INTEGER	Refer to Lookup Tables Sheet Col AP, AQ

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Caregiver Relationship File				
Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Caregiver (use Participant ID)	Required by System	R-FCSP Only	INTEGER	Insert the appropriate Internal Participant ID from the Client File for this individual. If ID is missing, record will be discarded by system, with the exception of Non-Registered services. A NULL (i.e. blank) value is acceptable in this field when entering service units for non-registered services.
Care Receiver (use Participant ID)	Required by System	R-FCSP Only	INTEGER	Insert the appropriate Internal Participant ID from the Client File for this individual. If ID is missing, record will be discarded by system.
Caregiver Relationship*	Required by System	R-FCSP Only	INTEGER	Refer to Lookup Tables Sheet Col AG,AH
Provider ID	Required by System	R-FCSP Only	INTEGER	Unique identifier for the FCSP provider assigned by your system. This ID corresponds to the provider ID in the Enrollment File, Service Units File and Caregiver Relationship File (if reporting a caregiver).
Service ID	Required by System	R-FCSP Only	INTEGER	Unique identifier (as assigned by your system) of the CAREGIVER service for which the units belong. This ID corresponds to a service ID in the Service Provider File. There is no Service ID requirement for the CARE RECEIVER.

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Legal Assistance Client File				
Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Client Unique ID	Required by System	Required	INTEGER	Unique identifier for each participant assigned by your system.
Gender	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col C,D
Gender not listed, specify	Situational	Optional **	TEXT	Answer is required if Gender = 6.
Sex at Birth	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col A,B
Sexual Orientation or Sexual Identify	Required by System	Required	INTEGER	Answer is required if Sexual Orientation or Sexual Identity = 5.
Sexual Orientation not listed, specify	Situational	Optional **	TEXT	Answer is required if Sexual Orientation = 5.
Date of Birth	Required by System	Required: DOB or Age **	YYYY-MM-DD	When missing, submit value of "0000-00-00" or "0" for this field.
Age	Required by System	Required: DOB or Age **	INTEGER	
Race	Required by System	Required	MULTI-SELECT INTEGER, Race1; Race2; Race3; (1,2,	Refer to Lookup Tables 2 Sheet Col G,H
Ethnicity	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col I,J
Zip Code	Required by System	Required: Zip Code or Geogr	##### or #####-####	
Geographic Distribution	Required by System	Required: Zip Code or Geogr	INTEGER	Refer to Lookup Tables 2 Col O,P
Household Status	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col M,N
Poverty Status	Required by System	Required	INTEGER	Refer to Lookup Tables Sheet Col K,L

* REFER TO LOOKUP TABLE 2

Legal Assistance Case				
Field	Required/Optional for System	Required/Optional for Reporting	Data Type/Format	Comments
Case Unique ID	Required by System	Required	INTEGER	Unique identifier for each case assigned by your system.
Client Unique ID	Required by System	Required	INTEGER	Unique identifier for each participant assigned by your system.
Case Open Date	Required by System	Required	YYYY-MM-DD	
Case Closed Date	Required by System	Situational	YYYY-MM-DD	Date is blank until the case is closed, then send the closed date.
Service Level	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col Q,R
Case Type	Required by System	Required	INTEGER	Refer to Lookup Tables 2 Col S,T
Month	Required by System	Required	INTEGER, 1-12	
Year	Required by System	Required	INTEGER, YYYY	
Hours (units recorded)	Required by System	Required	NUMERIC (Example 1 or 1.25)	Total units of service delivered to participant in the month/year indicated.

EMERGENCY PREPAREDNESS PLAN INSTRUCTIONS

All OAA contractors must be prepared to respond to clients and staff in their facilities at the time of a disaster and to develop a plan for the continuation or restoration of services after a disaster. Each contracted agency must have a written Emergency Operations Plan (Plan) that is updated annually and that can be activated in a declared emergency. The Plan must include information on designated staff who will contact Aging and Adult Services in case of emergency and report the status of your agencies physical plant, ability to provide services, and when applicable, client status. The Plan shall include assurances that the following preparations have been made:

I. Facility Preparation

- A. Adequately secure all furniture, appliances and other free-standing objects.
- B. Move heavy items to lower shelves in closets and cabinets.
- C. Check cabinet doors to be sure they can be closed securely.
- D. Remove or isolate flammable materials.
- E. Clearly mark gas and water shut-off valves and post legible instructions on how to shut off each one. If your staff has no access to shut-off valves because you lease or rent the space, list the person who has shut-off responsibility and how to locate that person in an emergency.
- F. Maintain a conveniently located set of tools (including pipe and crescent wrenches) to facilitate prompt shut-off of gas and water.
- G. Post Evacuation Plan for the facility in a location readily accessible to the public.
- H. Indicate the locations at each site where the following items can be found in working condition.
 - Portable radio and spare batteries
 - First Aid supplies
 - Flashlights and spare batteries
 - Wrenches and other tools
 - Fire extinguishers
 - Water and food supply

- II. Maintenance of food and water supply
 - A. Store sufficient water for program participants likely to be detained at the site for up to 72 hours.
 - B. Maintain a supply of nutritious snack food in vermin-proof storage.
- III. Assignment of staff who are responsible during an emergency, including specific assignments for each staff member
- IV. Inventory of staff members' skills for disaster response
- V. Inventory of equipment to be used in disaster response
- VI. Training Provisions
 - A. Training for all staff, volunteers and participants in the agency's Emergency Operations Plan.
 - B. Training of staff, volunteers and participants in home preparedness.
 - C. Provisions to train staff and volunteers in First Aid and CPR.
 - D. Training for Earthquake Preparedness shall include:
 - Two documented earthquake drills per year.
 - Procedures to assemble staff if no phones are working.
 - Probability that no transportation, utilities (including telephone) or emergency services will be available for an undetermined time after a major quake.
 - The importance of cooperating with public officials.
 - How to inspect facilities for damage, water and gas leaks.
 - How to check for injuries.
 - Warning about the danger of cooking inside buildings.
 - The probability of aftershocks.
 - Tuning in on a portable radio.
- VII. Fire Safety Provisions
 - A. Fire extinguishers on site that are checked and tagged once a year.
 - B. Two documented fire drills per year for clients and staff.
 - C. Paths of travel free from obstruction.
 - D. Exits clearly marked.

- VII. Contingency plans to continue program services including: Memorandums of Understanding (MOUs) with appropriate organizations and the building owner.
- IX. Clear information about the location of resources in the Emergency Operations District in which the site is located. Important note: Planned resources may not be able to function. Check the Emergency Alert System and SMC Alert for resources in operation.
- X. Written reports of all incidents or disaster situations involving staff, participants, volunteers and/or the facility shall be filed with the chief administrator, whether or not there is apparent injury or property damage.

The preceding requirements are part of the standards required of all agencies that receive funds from the OAA. Verification that these standards have been met will occur when programs are routinely assessed by the Aging and Adult Services staff and during the annual monitoring visit.

**AGING AND ADULT SERVICES
CORRECTIVE ACTION POLICY
FOR CONTRACTED OLDER AMERICANS ACT
AND COUNTY SPONSORED PROGRAM PROVIDERS**

1. The provider will make every effort to take corrective action immediately after a verbal or written request regarding program and/or fiscal performance has been made by Aging and Adult Services staff.
2. If corrective action is not taken within 30 days, a written request to comply will be made by Aging and Adult Services.
3. A written response outlining a corrective action plan will be required within a timeline specified in the written request. Compliance will be required in a timeframe appropriate to the requested corrective action and specified by Aging and Adult Services.
4. If compliance doesn't occur within the specified timeline, payment for services may be withheld until corrective action is taken. In the event this occurs, a written warning will be sent to the provider specifying that payment will cease 30 days from the date the letter was sent by Aging and Adult Services.
5. Non-compliance with Corrective Action may result in termination of the contract.

AMERICANS WITH DISABILITIES ACT (ADA) MONITORING INFORMATION

This is informational only and does not need to be completed as part of this RFP

SITE SPECIFIC

1. Do you have clearly marked accessible public parking (ratio: 1 accessible space to 25 spaces overall) that includes van accessible space(s) for participants and/or visitors with disabilities?
2. Is the path of travel into your building even and unobstructed (no tree roots, cracked pavement)? Are there curb ramps?
3. Do you have automatic doors or is the entrance door light enough for someone using a wheelchair, walker or crutches to open? Do you have a flat threshold? Do you have levered door handles?
4. Do your restrooms have at least one stall large enough (56" x 60") for a wheelchair to go into the stall and turn around? Do you have automatic doors into the restroom? Do you have grab bars on at least one wall-surrounding toilet? Do you have levered sink handles? Do you have lowered light switches? (48" max.) Do you have a lowered towel dispenser? (40" max.)
5. Are your corridors wide enough to accommodate wheelchairs going in opposite directions (44")? Can a wheelchair user turn around in the corridors (minimum five ft. turn around space)?
6. Do you have at least one water fountain and/or pay phone (if applicable) lower/accessible to someone with a visual, hearing or mobility impairment? Do you have volume control for phone? Do you have Braille/large print signage? Is your water fountain recessed?
7. Are the services your agency provides accessible to all individuals with/without a disability (eg. Braille signage, large print, amplified sound system, assistive listening system, sign language interpreter, as needed)?
8. Does your facility need technical assistance in order to assure compliance with the Americans with Disabilities Act?

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Personal Care	1 Hour	Personal assistance, stand-by assistance, supervision or cues. (such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming).	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 1	NAPIS Div 4000 Unit 20	Title III B	Yes	Registered
Homemaker	1 Hour	Assistance such as preparing meals, shopping for personal and household items, managing money, using the telephone or doing light housework.	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 2	NAPIS Div 4000 Unit 50, Unit 27	Title III B	Yes	Registered
Chore	1 Hour	Assistance such as heavy housework, yard work or sidewalk and other home maintenance for a person.	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 3	NAPIS Div 4000 Unit 5	Title III B	Yes	Registered
Home-Delivered Meals	1 Meal	A meal provided to an eligible individual in his or her place of residence, that meets all of the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans.	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 4	NAPIS Div 4000 Unit 51	Title III C-2	No	Registered
Adult Day Care / Adult Day Health	1 Hour	Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, and services such as rehabilitation, medications assistance and home health aide services for adult day health.	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 5	NAPIS Div 4000 Pr 5, Pr 11, Pr 17	Title III B	Yes	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Case Management	1 Hour	Assistance either in the form of access coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing and coordinating services among providers, and providing follow-up and reassessment, as required.	Cluster 1 service: Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.	NAPIS 6	NAPIS Div 4000 Pr 3	Title III B	Yes	Registered
Assisted Transportation	1 One Way Trip	Assistance and transportation, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.	Cluster 2 services: Reporting requirements include unduplicated client counts by characteristic and service units. For FCSP, ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only	NAPIS 7	NAPIS Div 4000 Unit 10	Title III B	No	Registered
Congregate Meals	1 Meal	A meal provided to an eligible individual in a congregate group setting, that meets all of the requirements of the Older Americans Act and State/Local laws, and assures a minimum one-third of the Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans.	Cluster 2 services: Reporting requirements include unduplicated client counts by characteristic and service units. For FCSP, ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only	NAPIS 8	NAPIS Div 4000 Pr 20	Title III C-1	No	Registered
Nutrition Counseling	1 Session Per Participant	Individualized guidance to individuals who are at nutritional risk because of their health or nutrition history, dietary intake, chronic illnesses, or medications use, or to caregivers. Counseling is provided one-on-one by a registered dietitian, and addresses the options and methods for improving nutrition status. Nutrition counseling may be made either in person or by any other means deemed appropriate (e.g., telephone, emails, etc.)	Cluster 2 services: Reporting requirements include unduplicated client counts by characteristic and service units. For FCSP, ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only	NAPIS 9	NAPIS Div 4000 Unit 53	Title III C-1 Title III C-2	No	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Transportation	1 One Way Trip	Transportation from one location to another. Does not include any other activity. May include travel vouchers and transit passes.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 10	NAPIS Div 4000 Pr 12	Title III B	Yes	Non-Registered
Legal Assistance	1 Hour	Legal advice, counseling and/or representation by an attorney or other person acting under the supervision of an attorney.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 11	NAPIS Div 4000 Pr 14	Title III B	Yes	Non-Registered
Nutrition Education	1 Session Per Participant	A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants, caregivers, or participants in a group or individual setting overseen by a dietitian or individual of comparable expertise. Methods of education may include demonstrations, audio-visual presentations, or small group discussions for congregate program participants. Handout materials may be used, but not limited to, as the sole education component for home-delivered meal program participants.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 12	NAPIS Div 4000 Unit 52	Title III C-1 Title III C-2	No	Non-Registered
Information and Assistance	1 Contact	A service that: (A) provides individuals with information on services available within the communities; (B) links individuals to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied, and (C) is satisfied. Maximum extent practicable includes offering a follow-up call to all individuals who were linked to a service. Individuals can remain anonymous and refuse a follow-up call.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 13	NAPIS Div 4000 Pr 1	Title III B	Yes	Non-Registered
Outreach	1 Contact	Interventions (one-on-one contacts) with individuals initiated by an agency or provider for the purpose of identifying potential clients (or their age 60+ caregivers) and encouraging their use of existing services and benefits.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 14	NAPIS Div 4000 Unit 19	Title III B	Yes	Non-Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Health Promotion	1 Contact	An evidence-based health promotion program, including programs related to the prevention and mitigation of the effects of chronic disease (including, but not limited to, osteoporosis, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. For a list of ACL approved Evidence-Based programs, please visit the National Council on Aging website at https://www.ncoa.org/resources/ebpchart .	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 16 - Health Promotion	Older Americans Act Sec 102 (14)	Title III D ³	No	Non-Registered
Alzheimer's Day Care Services	1 Day of Attendance	Day of attendance (four hours minimum) at a licensed Adult Day Care or Adult Day Health Care Center that provides Alzheimer's or dementia services.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 6	Title III B	Yes	Non-Registered
Cash / Material Aid	1 Assistance	Arrange for and provide assistance to participants in the form of commodities, surplus food distribution, emergency cash assistance, and vouchers.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 15	Title III B	No	Non-Registered
Community Education	1 Activity	Educating groups of older persons, their families, friends, and community organizations/facility staff on rights, benefits, entitlements, and health and wellness information for older persons either residing at home or in an institutional setting.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 9	Title III B	No	Non-Registered
Comprehensive Assessment	1 Hour	Evaluating a person's physical, psychological, and social needs, financial resources, and the strengths and weaknesses of their informal support system and the immediate environment as a basis for determining current functional ability and potential improvement in order to develop the appropriate services needed to maximize functional independence.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 32 CCR 7112	Title III B	Yes	Non-Registered
Disaster Preparedness Materials	1 Product	Assemble and distribute disaster preparedness materials such as File of Life or preparedness kits that will assist seniors in the event of an emergency.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	No reference	Title III B	No	Non-Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Elder Abuse Prevention, Education and Training	1 Session	Public education and training of professionals to develop, strengthen, and carry out programs for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation). This includes training for Title III E caregivers.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 22	Title VII B	No	Non-Registered
Elder Abuse Prevention Educational Materials	1 Product	Educational materials and guidance kits distributed for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 22	Title VII B	No	Non-Registered
Employment	1 Activity	Activities designed to maintain or obtain part-time/full-time employment for older persons or to assist them in selecting and entering into a second career. This can be accomplished through activities including but not limited to career counseling, recruitment, assessment, training, job club, and job development.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 15	Title III B	No	Non-Registered
Health	1 Hour	Activities such as, non-evidence-based medication management, health screening, physical fitness, therapy, and hospice to assist older individuals to improve or maintain physical health and secure necessary medical, preventive health, or health maintenance services. Health screening, therapy, and hospice must be provided by a licensed health professional or by a paraprofessional supervised by a licensed health professional. Does not include services covered by Medicare, Medi-Cal, or other health insurance. Medication management means activities that facilitate safe and effective use of prescription and over-the-counter drugs. These activities may include medication screening and education to an individual and/or the caregiver to prevent incorrect medication administration and adverse drug reaction. Primary activities are normally on a one-to-one basis; if done as a group activity, each participant shall be counted as one contact unit.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 9, Unit 13, Unit 21, Unit 29, Unit 37	Title III B	Yes	Non-Registered
Housing	1 Hour	Assistance in locating adequate housing through referral or placement.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 4	Title III B	No	Non-Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Interpretation / Translation	1 Contact	Provide interpretation/translation services for older individuals and their caregivers.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 4	Title III B	No	Non-Registered
Mobility Management Activities	1 Hour	Activities related to increasing transportation and mobility options for older adults by providing assistance, information, travel training, trip planning, coordination of service public or private transit operators, scheduling, access to transit information, creation of new models of service such as volunteer driver programs and shuttles.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other		Title III B	No	Non-Registered
Mental Health	1 Hour	Provide services such as screening, assessment, therapy, counseling, follow-up, and referral to maintain or improve the mental health of older individuals. Mental Health services must be provided by a licensed health professional or by a paraprofessional supervised by a licensed health professional. Does not include services covered by Medicare, Medi-Cal, or other health insurance.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 10, Unit 11, Unit 23, Unit 29	Title III B	Yes	Non-Registered
Peer Counseling	1 Hour	Use the skills and/or life experiences of trained volunteers, under qualified supervision, to provide advice, guidance, and support in a self-help approach in order to enhance well-being and enable clients to make informed choices.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 7	Title III B	No	Non-Registered
Personal Affairs Assistance	1 Contact	Provide assistance in writing letters and with the completion of financial forms, including tax forms, and other written or electronic documents.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 12, Pr 16	Title III B	No	Non-Registered
Personal /Home Security	1 Product	Services for the security and safety of their home environment, by providing safety features such as: medical alert, alarms, assistive devices (including provision of assistive technology services and assistive technology devices).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 7	Title III B	No	Non-Registered
Public Information	1 Activity	Contact with multiple current or potential clients or caregivers through publications, publicity campaigns, and other mass media campaigns including Internet websites.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	NAPIS	Title III B	Yes	Non-Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Registry	1 Hour	Recruit workers, maintain a current list of qualified workers, refer workers to clients or clients to workers, and follow-up to assure that service was received.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 41	Title III B	No	Non-Registered
Residential Repairs / Modifications	1 Modification	Residential modifications of homes that are necessary to facilitate the ability of older individuals to remain at home and that are not available under other programs. Includes minor repairs/renovations in order to meet safety, health issues, and code standards.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 1, Unit 48	Title III B	Yes	Non-Registered
Respite Care	1 Hour	Arrange for relief of the relatives or other caregivers of the frail elderly living at home by the coordination or direct provision of supportive services to the older person(s) while the primary caregiver is temporarily absent (includes Adult Day Care as a respite service for families).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 18, Unit 45	Title III B	Yes	Non-Registered
Senior Center Activities	1 Hour	Services designed to enable older individuals to attain and/or maintain physical and mental well-being such as recreation, music, creative arts, physical activity, education, leadership development and other supportive services not covered under other service categories. Development and provision of new volunteer opportunities and services, and creation of additional services and programs to remedy gaps and deficiencies in existing services. Entertainment costs such as tickets to shows or sporting events, meals, lodging, rentals, transportation and gratuities, are not allowable.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Pr 13 OMB A-87	Title III B	No	Non-Registered
Telephone Reassurance	1 Contact	Telephone a client to provide contact and safety checks to reassure and support older individuals.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 28	Title III B	Yes	Non-Registered
Visiting	1 Hour	Visit a client to provide contact and safety checks to reassure and support older individuals.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS 15 - Other	Div 4000 Unit 31	Title III B	Yes	Non-Registered

FCSP - Caregiver Caring for Elderly Support Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Assessment (Caring for Elderly)	1 Hour	An FCSP Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated; and will explore options and courses of action for caregivers by identifying their: (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; and (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Counseling (Caring for Elderly)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Peer Counseling (Caring for Elderly)	1 Hour	An FCSP Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Support Group (Caring for Elderly)	1 Hour	An FCSP Support Service provided to a group of 3 - 12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving, and to improve decision-making and problem-solving skills related to their caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Training (Caring for Elderly)	1 Hour	An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and address the areas of health, nutrition, and financial literacy.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Case Management (Caring for Elderly)	1 Hour	An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminished capacities due to mental impairment or temporary severe stress and/or depression.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPISFCSP 1Support Svcs	OAA 373(b)(3) NAPISCDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Caregiver Caring for Elderly Respite Care

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Respite In-Home Supervision (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Homemaker Assistance (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite In-Home Personal Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Home Chore (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Respite Out-of-Home Day Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Out-of-Home Overnight Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Caregiver Caring for Elderly Supplemental Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Assistive Devices for Caregiving (Caring for Elderly)	1 Device is 1 Occurrence	An FCSP Supplemental Service that involves the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Home Adaptations for Caregiving (Caring for Elderly)	1 Modification is 1 Occurrence	An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to fulfill caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiving Services Registry (Caring for Elderly)	1 Hour is 1 Occurrence	An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to use personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and the self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiving Emergency Cash / Material Aid (Caring for Elderly)	1 Assistance is 1 Occurrence	An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Caregiver Caring for Elderly Access Assistance

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Outreach (Caring for Elderly)	1 Contact	An FCSP Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services (e.g., Caregiver InfoVan staff contacts outside of local market).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiving Information and Assistance (Caring for Elderly)	1 Contact	An FCSP Access Assistances service that: (A) provides caregivers with information on services available within the communities, including caregiving information related to assistive technology and caring for older individuals at risk for institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous and refuse follow-up contact).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiver Interpretation / Translation (Caring for Elderly)	1 Contact	An FCSP Access Assistance Service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for his caregiver).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiver Legal Resources (Caring for Elderly)	1 Contact	An FCSP Access Assistance Service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving-related legal issues.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered

FCSP - Caregiver Caring for Elderly Information Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Public Information on Caregiving (Caring for Elderly)	1 Activity	An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Community Education on Caregiving (Caring for Elderly)	1 Activity	An FCSP Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered

FCSP - Grandparent Caring for Child Support Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Assessment (Caring for Child)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of counseling service, which may range from guidance with caregiving responsibilities to therapy for stress, depression, and loss; and (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Counseling (Caring for Child)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
		consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.						
Caregiver Peer Counseling (Caring for Child)	1 Hour	An FCSP Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Support Group (Caring for Child)	1 Hour	An FCSP Support Service provided to a group of 3 - 12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving, and to improve decision-making and problem-solving skills related to their caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Training (Caring for Child)	1 Hour	An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and shall address the areas of health, nutrition, and financial literacy.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Case Management (Caring for Child)	1 Hour	An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminished capacities due to mental impairment or temporary severe stress and/or depression.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Grandparent Caring for Child Respite Care

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Respite In-Home Supervision (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Homemaker Assistance (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite In-Home Personal Care (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Home Chore (Caring for Child)	1 Hour	An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Out-of-Home Day Care (Caring for Child)	1 Hour	An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiver Respite Out-of-Home Overnight Care (Caring for Child)	1 Hour	An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Grandparent Caring for Child Supplemental Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Assistive Devices for Caregiving (Caring for Child)	1 Device is 1 Occurrence	An FCSP Supplemental Service that involves the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill the caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Home Adaptations for Caregiving (Caring for Child)	1 Modification is 1 Occurrence	An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to facilitate and fulfill caregiving responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiving Services Registry (Caring for Child)	1 Hour is 1 Occurrence	An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to use personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and the self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered
Caregiving Emergency Cash / Material Aid (Caring for Child)	1 Assistance is 1 Occurrence	An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities.	FCSP Registered services: Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered

FCSP - Grandparent Caring for Child Access Assistance

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Caregiver Outreach (Caring for Child)	1 Contact	An FCSP Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services (e.g., Caregiver InfoVan staff contacts outside of local market).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiving Information and Assistance (Caring for Child)	1 Contact	An FCSP Access Assistance service that: (A) provides caregivers with information on services available within the communities, including caregiving information related to assistive technology and caring for older individuals at risk for institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous and refuse follow-up contact).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiver Interpretation / Translation (Caring for Child)	1 Contact	An FCSP Access Assistance service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for his caregiver).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Caregiver Legal Resources (Caring for Child)	1 Contact	An FCSP Access Assistance service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving-related legal issues.	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered

FCSP - Grandparent Caring for Child Information Services

Service Category	Unit Measure ¹	Definitions	Reporting Requirements	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Public Information on Caregiving (Caring for Child)	1 Activity	An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered
Community Education on Caregiving (Caring for Child)	1 Activity	An FCSP Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).	Non-Registered services: Reporting requirements include estimated unduplicated client counts and service units.	NAPIS FCSP 5 Information	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered

Fiscally Allowable Administrative Activities

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Reporting Requirements	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Program Development	N/A	Activities that either establish a new service or expand or integrate existing services.	Non-NAPIS	Fiscally allowable administrative activities	CDA Standard Agreement Exhibit A	Title III B	No	N/A
Coordination	N/A	Activities that involve the active participation of the AAA staff to include liaison with non-OAA funded agencies and organizations for the purpose of avoiding duplication, improving services, resolving problems related to service delivery, and addressing the service needs of the eligible service population.	Non-NAPIS	Fiscally allowable administrative activities	CDA Standard Agreement Exhibit A	Title III B	No	N/A
CARS / Data Reporting Systems	N/A	The purchase, development, and maintenance of software designed to meet the requirements of the California Aging Reporting System (CARS). Maintenance includes system patches and upgrades. Activities include training staff on data collection and systems.	Non-NAPIS	Fiscally allowable administrative activities		Title III B	No	N/A

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Reporting Requirements	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³
Emergency Preparedness	N/A	Develop long-term emergency plans.	Non-NAPIS	Fiscally allowable administrative activities		Title III B	No	N/A
Senior Center Staffing	N/A	Assist with the operation of the multipurpose senior center by meeting all or part of the costs of compensating professional and technical personnel required for the operation of the center.	Non-NAPIS	Fiscally allowable administrative activities	Div 4000 Unit 42	Title III B	No	N/A

¹ AAAs must track the actual time services provided in their local database (i.e. minutes, fractions). All service units that are measured in hours must be reported as whole numbers (no fractions/partial units can be reported). When exporting this data to the California Aging Reporting System (CARS) the AAA's software system must round total service units for each client by month and by service category to the nearest integer (i.e. can round up or down). This should not affect the actual data in the AAA database, only the service unit totals in the CARS export files. Due to rounding, CDA expects minor service unit discrepancies (not to exceed 10 percent) between the AAA database and CARS. Also see "CARS Overview and Guidance" document.

² All references to Division 4000 and CDA FCSP Service Matrix are for historical reference only.

³ In addition to reporting service units, AAAs must also report unduplicated client enrollments/estimated audience size (see the color key above for further information).

Service Categories and Data Dictionary:

Glossary of Terms and Acronyms

AAA: Area Agency on Aging

ADL: Activities of Daily Living

IADL: Instrumental Activities of Daily Living

AoA: United States Administration on Aging <http://www.aoa.gov/>

CARS: A multi-phased, multi-year project started in June 2007 which will transform the existing Older Americans Act (OAA) and Older Californians Act (OCA) aggregate reporting system into a new web-based system capable of providing the State with client-level data from the Aging Services network.

The complete project envisions web-based access to one common database (standardized data specification across programs) on OAA and OCA fiscal, program performance (utilization), and client-level demographic profile data (Registered services only; a number of Non-Registered services remaining are aggregated data).

It will allow the California Department of Aging (CDA) to compare data across all programs, as opposed to having silos of data that are not comparable to one another.

CCR: California Code of Regulations <http://www.oal.ca.gov/ccr.htm>

CDA: California Department of Aging <http://www.aging.ca.gov/>

DIV: Division (as in a section of law)

Division 4000: Division 4000 is used to specify the Other Title III B and Title III D services not defined in NAPIS, as well as elder abuse prevention activities related to Title VII. With the implementation of the Service Category and Data Dictionary Matrix, definitions from this source will no longer be used.

Estimated Unduplicated Client Count: The Administration on Aging has not provided a method to estimate an Unduplicated Count of Clients. Each AAA must supply its own methodology.

FCSP: Family Caregiver Support Program -- same as Title III E. FCSP provides support to (1) unpaid family caregivers of older adults and (2) grandparents or other older relatives with primary caregiving responsibilities for a child through five broad categories of services (see FCSP 1-5)

FCSP 1: Support Services means the provision of caregiver assessment, caregiver counseling, caregiver peer counseling, caregiver support groups, caregiver training, and (if necessary) caregiver case management.

FCSP 2: Respite Care means a brief period of relief or rest from caregiving responsibilities, and is provided to caregivers on an intermittent, occasional, or emergency basis in a manner that responds to the individual needs and preferences of the caregivers and their care receivers, rather than a pre-established set amount offered on a "first come, first served" waiting list basis.

FCSP 3: Supplemental Services means caregiver-centered assistance offered on a limited basis to support and strengthen the caregiving efforts.

FCSP 4: Access Assistance means the provision of caregiving information and assistance, caregiver outreach, caregiver interpretation/translation, and caregiver legal resources; and links caregivers to the opportunities and services that are available.

FCSP 5: Information Services means the provision of public information on caregiving and/or community education on caregiving, including information about available services.

InfoVan: A specialized vehicle used by Area Agencies on Aging and their providers for outreach and education on services and information via oral communication and written information such as flyers, brochures, etc. http://www.cda.ca.gov/aaa/reporting_instructions/info_van.asp

NAPIS: The National Aging Program Information System (NAPIS) through which the State Program Report (SPR) is reported annually. The report contains statistical compilation of performance data and expenditures for programs administered by CDA with OAA Title III and Title VII funds. The data is collected and reported by service providers, AAAs, and State Units on Aging (for California, CDA) (for State on quarterly basis) on an annual basis in CARS. Statistical data is reported to AoA per federal guidelines by January 31 of each year by CDA.

Non Registered Services: Non-registered services are those services where it is not practical to collect client specific information or where requiring the client to register may serve as a barrier to receiving a service (see Service Categories and Data Dictionary document).

OAA: The Federal Older Americans Act: Congress enacted in 1965 to promote and provide assistance in the development of programs of benefit to the elderly and to provide funding for such programs through State Units and Area Agencies on Aging. http://www.aoa.gov/AoARoot/AoA_Programs/OAA/index.aspx

OCA: In 1974, the Burton Act established the California Department of Aging (CDA) as a department within the Health and Welfare Agency. Initially the CDA was known as the Office on Aging. The Burton Act also established the California Commission on Aging (CCoA) as an advisory body to the Governor, Legislature, Department of Aging and other state departments, as well as provided funding and staffing.

Pr: Refers to "Program" type under Division 4000

Registered Services: Means data collection and reporting requirements include unduplicated client counts by characteristic, units of service, including in some cases ADLs/IADLs (see Service Categories and Data Dictionary document). Registered Services are client specific data using participant identification numbers for each client.

Service Categories and Data Dictionary: See Service Categories and Data Dictionary section.

Title III B: Title III B of the Older Americans Act that provides funding for supportive services such as, but not limited to, Information and Referral Services, In-home Services, Legal Services, Outreach, Respite Care/Respite Care Registries, and Transportation.

Title III C-1: Title III C-1 of the Older Americans Act that provides funding for the provision of Congregate Meals.

Title III C-2: Title III C-2 of the Older Americans Act that provides funding for the provision of Home Delivered Meals.

Title III D: Title III D of the Older Americans Act that provides funding for the provision of Disease Prevention and Health Promotion Services.

Title III E: See FCSP

Title VII B: Elder Abuse Prevention

Service Categories and Data Dictionary:

Summary of Changes

AAA Activities and CARS Reporting

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Personal Care	1 Hour	Personal assistance, stand-by assistance, supervision or cues. (such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming).	NAPIS 1	NAPIS Div 4000 Unit 20	Title III B	Yes	Registered	No Changes
Homemaker	1 Hour	Assistance such as preparing meals, shopping for personal and household items, managing money, using the telephone or doing light housework.	NAPIS 2	NAPIS Div 4000 Unit 50, Unit 27	Title III B	Yes	Registered	No Changes
Chore	1 Hour	Assistance such as heavy housework, yard work or sidewalk and other home maintenance for a person.	NAPIS 3	NAPIS Div 4000 Unit 5	Title III B	Yes	Registered	No Changes
Home-Delivered Meals	1 Meal	A meal provided to an eligible individual in his or her place of residence, that meets all of the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans.	NAPIS 4	NAPIS Div 4000 Unit 51	Title III C-2	No	Registered	No Changes
Adult Day Care / Adult Day Health	1 Hour	Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, and services such as rehabilitation, medications assistance and home health aide services for adult day health.	NAPIS 5	NAPIS Div 4000 Pr 5, Pr 11, Pr 17	Title III B	Yes	Registered	No Changes
Case Management	1 Hour	Assistance either in the form of access coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing and coordinating services among providers, and providing follow-up and reassessment, as required.	NAPIS 6	NAPIS Div 4000 Pr 3	Title III B	Yes	Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Assisted Transportation	1 One Way Trip	Assistance and transportation, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.	NAPIS 7	NAPIS Div 4000 Unit 10	Title III B	No	Registered	No Changes
Congregate Meals	1 Meal	A meal provided to an eligible individual in a congregate group setting, that meets all of the requirements of the Older Americans Act and State/Local laws, and assures a minimum one-third of the Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans.	NAPIS 8	NAPIS Div 4000 Pr 20	Title III C-1	No	Registered	No Changes
Nutrition Counseling	1 Session Per Participant	Individualized guidance to individuals who are at nutritional risk because of their health or nutrition history, dietary intake, chronic illnesses, or medications use, or to caregivers. Counseling is provided one-on-one by a registered dietitian, and addresses the options and methods for improving nutrition status. Nutrition counseling may be made either in person or by any other means deemed appropriate (e.g., telephone, emails, etc.)	NAPIS 9	NAPIS Div 4000 Unit 53	Title III C-1 Title III C-2	No	Registered	No Changes
Transportation	1 One Way Trip	Transportation from one location to another. Does not include any other activity. May include travel vouchers and transit passes.	NAPIS 10	NAPIS Div 4000 Pr 12	Title III B	Yes	Non-Registered	No Changes
Legal Assistance	1 Hour	Legal advice, counseling and/or representation by an attorney or other person acting under the supervision of an attorney.	NAPIS 11	NAPIS Div 4000 Pr 14	Title III B	Yes	Non-Registered	No Changes
Nutrition Education	1 Session Per Participant	A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants, caregivers, or participants in a group or individual setting overseen by a dietitian or individual of comparable expertise. Methods of education may include demonstrations, audio-visual presentations, or small group discussions for congregate program participants. Handout materials may be used, but not limited to, as the sole education component for home-delivered meal program participants.	NAPIS 12	NAPIS Div 4000 Unit 52	Title III C-1 Title III C-2 Title III D ⁴	No	Non-Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Information and Assistance	1 Contact	A service that: (A) provides individuals with information on services available within the communities; (B) links individuals to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied, and (C) is satisfied. Maximum extent practicable includes offering a follow-up call to all individuals who were linked to a service. Individuals can remain anonymous and refuse a follow-up call.	NAPIS 13	NAPIS Div 4000 Pr 1	Title III B	Yes	Non-Registered	No Changes
Outreach	1 Contact	Interventions (one-on-one contacts) with individuals initiated by an agency or provider for the purpose of identifying potential clients (or their age 60+ caregivers) and encouraging their use of existing services and benefits.	NAPIS 14	NAPIS Div 4000 Unit 19	Title III B	Yes	Non-Registered	No Changes
Health Promotion	1 Contact	An evidence-based health promotion program, including programs related to the prevention and mitigation of the effects of chronic disease (including, but not limited to, osteoporosis, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. For a list of ACL approved Evidence-Based programs, please visit the National Council on Aging website at https://www.ncoa.org/resources/ebpchart .	NAPIS 16 - Heath Promotion	Older Americans Act Sec 102 (14)	Title III D ³	No	Non-Registered	No Changes
Alzheimer's Day Care Services	1 Day of Attendance	Day of attendance (four hours minimum) at a licensed Adult Day Care or Adult Day Health Care Center that provides Alzheimer's or dementia services.	NAPIS 15 - Other	Div 4000 Pr 6	Title III B	Yes	Non-Registered	No Changes
Cash / Material Aid	1 Assistance	Arrange for and provide assistance to participants in the form of commodities, surplus food distribution, emergency cash assistance, and vouchers.	NAPIS 15 - Other	Div 4000 Unit 15	Title III B	No	Non-Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Community Education	1 Activity	Educating groups of older persons, their families, friends, and community organizations/facility staff on rights, benefits, entitlements, and health and wellness information for older persons either residing at home or in an institutional setting.	NAPIS 15 - Other	Div 4000 Unit 9	Title III B	No	Non-Registered	No Changes
Comprehensive Assessment	1 Hour	Evaluating a person's physical, psychological, and social needs, financial resources, and the strengths and weaknesses of their informal support system and the immediate environment as a basis for determining current functional ability and potential improvement in order to develop the appropriate services needed to maximize functional independence.	NAPIS 15 - Other	Div 4000 Unit 32 CCR 7112	Title III B	Yes	Non-Registered	No Changes
Disaster Preparedness Materials	1 Product	Assemble and distribute disaster preparedness materials such as File of Life or preparedness kits that will assist seniors in the event of an emergency.	NAPIS 15 - Other	No reference	Title III B	No	Non-Registered	No Changes
Elder Abuse Prevention, Education and Training	1 Session	Public education and training of professionals to develop, strengthen, and carry out programs for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).This includes training for Title III E caregivers.	NAPIS 15 - Other	Div 4000 Pr 22	Title VII B	No	Non-Registered	No Changes
Elder Abuse Prevention Educational Materials	1 Product	Educational materials and guidance kits distributed for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).	NAPIS 15 - Other	Div 4000 Pr 22	Title VII B	No	Non-Registered	No Changes
Employment	1 Activity	Activities designed to maintain or obtain part-time/full-time employment for older persons or to assist them in selecting and entering into a second career. This can be accomplished through activities including but not limited to career counseling, recruitment, assessment, training, job club, and job development.	NAPIS 15 - Other	Div 4000 Pr 15	Title III B	No	Non-Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Health	1 Hour	Activities such as non-evidence-based medication management, health screening, physical fitness, therapy, and hospice to assist older individuals to improve or maintain physical health and secure necessary medical, preventive health, or health maintenance services. Health screening, therapy, and hospice must be provided by a licensed health professional or by a paraprofessional supervised by a licensed health professional. Does not include services covered by Medicare, Medi-Cal, or other health insurance. Medication management means activities that facilitate safe and effective use of prescription and over-the-counter drugs. These activities may include medication screening and education to an individual and/or the caregiver to prevent incorrect medication administration and adverse drug reaction. Primary activities are normally on a one-to-one basis; if done as a group activity, each participant shall be counted as one contact unit.	NAPIS 15 - Other	Div 4000 Pr 9, Unit 13, Unit 21, Unit 29, Unit 37	Title III B	Yes	Non-Registered	No Changes
Housing	1 Hour	Assistance in locating adequate housing through referral or placement.	NAPIS 15 - Other	Div 4000 Pr 4	Title III B	No	Non-Registered	No Changes
Interpretation / Translation	1 Contact	Provide interpretation/translation services for older individuals and their caregivers.	NAPIS 15 - Other	Div 4000 Unit 4	Title III B	No	Non-Registered	No Changes
Mobility Management Activities	1 Hour	Activities related to increasing transportation and mobility options for older adults by providing assistance, information, travel training, trip planning, coordination of service public or private transit operators, scheduling, access to transit information, creation of new models of service such as volunteer driver programs and shuttles.	NAPIS 15 - Other		Title III B	No	Non-Registered	No Changes
Mental Health	1 Hour	Provide services such as screening, assessment, therapy, counseling, follow-up, and referral to maintain or improve the mental health of older individuals. Mental Health services must be provided by a licensed health professional or by a paraprofessional supervised by a licensed health professional. Does not include services covered by Medicare, Medi-Cal, or other health insurance.	NAPIS 15 - Other	Div 4000 Pr 10, Unit 11, Unit 23, Unit 29	Title III B	Yes	Non-Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Peer Counseling	1 Hour	Use the skills and/or life experiences of trained volunteers, under qualified supervision, to provide advice, guidance, and support in a self-help approach in order to enhance well-being and enable clients to make informed choices.	NAPIS 15 - Other	Div 4000 Unit 7	Title III B	No	Non-Registered	No Changes
Personal Affairs Assistance	1 Contact	Provide assistance in writing letters and with the completion of financial forms, including tax forms, and other written or electronic documents.	NAPIS 15 - Other	Div 4000 Unit 12, Pr 16	Title III B	No	Non-Registered	No Changes
Personal / Home Security	1 Product	Services for the security and safety of their home environment, by providing safety features such as: medical alert, alarms, assistive devices (including provision of assistive technology services and assistive technology devices).	NAPIS 15 - Other	Div 4000 Pr 7	Title III B	No	Non-Registered	No Changes
Public Information	1 Activity	Contact with multiple current or potential clients or caregivers through publications, publicity campaigns, and other mass media campaigns including Internet websites.	NAPIS 15 - Other	NAPIS	Title III B	Yes	Non-Registered	No Changes
Registry	1 Hour	Recruit workers, maintain a current list of qualified workers, refer workers to clients or clients to workers, and follow-up to assure that service was received.	NAPIS 15 - Other	Div 4000 Unit 41	Title III B	No	Non-Registered	No Changes
Residential Repairs / Modifications	1 Modification	Residential modifications of homes that are necessary to facilitate the ability of older individuals to remain at home and that are not available under other programs. Includes minor repairs/renovations in order to meet safety, health issues, and code standards.	NAPIS 15 - Other	Div 4000 Unit 1, Unit 48	Title III B	Yes	Non-Registered	No Changes
Respite Care	1 Hour	Arrange for relief of the relatives or other caregivers of the frail elderly living at home by the coordination or direct provision of supportive services to the older person(s) while the primary caregiver is temporarily absent (includes Adult Day Care as a respite service for families).	NAPIS 15 - Other	Div 4000 Pr 18, Unit 45	Title III B	Yes	Non-Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Senior Center Activities	1 Hour	Services designed to enable older individuals to attain and/or maintain physical and mental well-being such as recreation, music, creative arts, physical activity, education, leadership development and other supportive services not covered under other service categories. Development and provision of new volunteer opportunities and services, and creation of additional services and programs to remedy gaps and deficiencies in existing services. Entertainment costs such as tickets to shows or sporting events, meals, lodging, rentals, transportation and gratuities, are not allowable.	NAPIS 15 - Other	Div 4000 Pr 13 OMB A-87	Title III B	No	Non-Registered	No Changes
Telephone Reassurance	1 Contact	Telephone a client to provide contact and safety checks to reassure and support older individuals.	NAPIS 15 - Other	Div 4000 Unit 28	Title III B	Yes	Non-Registered	No Changes
Visiting	1 Hour	Visit a client to provide contact and safety checks to reassure and support older individuals.	NAPIS 15 - Other	Div 4000 Unit 31	Title III B	Yes	Non-Registered	No Changes

FCSP - Caregiver Caring for Elderly Support Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Assessment (Caring for Elderly)	1 Hour	An FCSP Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated; and will explore options and courses of action for caregivers by identifying their: (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; and (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Counseling (Caring for Elderly)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.	NAPISFCSP 1Support Svs	OAA 373(b)(3) NAPISCDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Peer Counseling (Caring for Elderly)	1 Hour	An FCSP Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Support Group (Caring for Elderly)	1 Hour	An FCSP Support Service provided to a group of 3 - 12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving, and to improve decision-making and problem-solving skills related to their caregiving responsibilities.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Training (Caring for Elderly)	1 Hour	An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and address the areas of health, nutrition, and financial literacy.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Case Management (Caring for Elderly)	1 Hour	An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminished capacities due to mental impairment or temporary severe stress and/or depression.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

FCSP - Caregiver Caring for Elderly Respite Care

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Respite In-Home Supervision (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Homemaker Assistance (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite In-Home Personal Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Home Chore (Caring for Elderly)	1 Hour	An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Out-of-Home Day Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Out-of-Home Overnight Care (Caring for Elderly)	1 Hour	An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

FCSP - Caregiver Caring for Elderly Supplemental Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Assistive Devices for Caregiving (Caring for Elderly)	1 Device is 1 Occurrence	An FCSP Supplemental Service that involves the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill caregiving responsibilities.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Home Adaptations for Caregiving (Caring for Elderly)	1 Modification is 1 Occurrence	An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to fulfill caregiving responsibilities.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiving Services Registry (Caring for Elderly)	1 Hour is 1 Occurrence	An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to use personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and the self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiving Emergency Cash / Material Aid (Caring for Elderly)	1 Assistance is 1 Occurrence	An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities.	NAPIS FCSP 3 Supplemental Svs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

FCSP - Caregiver Caring for Elderly Access Assistance

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Outreach (Caring for Elderly)	1 Contact	An FCSP Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services (e.g., Caregiver InfoVan staff contacts outside of local market).	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiving Information and Assistance (Caring for Elderly)	1 Contact	An FCSP Access Assistance service that: (A) provides caregivers with information on services available within the communities, including caregiving information related to assistive technology and caring for older individuals at risk for institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous and refuse follow-up contact).	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiver Interpretation / Translation (Caring for Elderly)	1 Contact	An FCSP Access Assistance Service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for his caregiver).	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiver Legal Resources (Caring for Elderly)	1 Contact	An FCSP Access Assistance Service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving-related legal issues.	NAPIS FCSP 4 Access Assistance	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes

FCSP - Caregiver Caring for Elderly Information Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Public Information on Caregiving (Caring for Elderly)	1 Activity	An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter).	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Community Education on Caregiving (Caring for Elderly)	1 Activity	An FCSP Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes

FCSP - Grandparent Caring for Child Support Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Assessment (Caring for Child)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of counseling service, which may range from guidance with caregiving responsibilities to therapy for stress, depression, and loss; and (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.	NAPIS FCSP 1 Support Svcs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Counseling (Caring for Child)	1 Hour	An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving-related financial and long-term care placement responsibilities.	NAPISFCSP 1Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Peer Counseling (Caring for Child)	1 Hour	An FCSP Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Support Group (Caring for Child)	1 Hour	An FCSP Support Service provided to a group of 3 - 12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving, and to improve decision-making and problem-solving skills related to their caregiving responsibilities.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Training (Caring for Child)	1 Hour	An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and shall address the areas of health, nutrition, and financial literacy.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Case Management (Caring for Child)	1 Hour	An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminished capacities due to mental impairment or temporary severe stress and/or depression.	NAPIS FCSP 1 Support Svs	OAA 373(b)(3) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

FCSP - Grandparent Caring for Child Respite Care

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Respite In-Home Supervision (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Homemaker Assistance (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer.	NAPISFCSP 2Respite Care	OAA 373(b)(4) NAPISCDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite In-Home Personal Care (Caring for Child)	1 Hour	An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Home Chore (Caring for Child)	1 Hour	An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Out-of-Home Day Care (Caring for Child)	1 Hour	An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes assess to social and recreational activities.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiver Respite Out-of-Home Overnight Care (Caring for Child)	1 Hour	An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care.	NAPIS FCSP 2 Respite Care	OAA 373(b)(4) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

FCSP - Grandparent Caring for Child Supplemental Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Assistive Devices for Caregiving (Caring for Child)	1 Device is 1 Occurrence	An FCSP Supplemental Service that involves the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill the caregiving responsibilities.	NAPIS FCSP 3 Supplemental Svcs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Home Adaptations for Caregiving (Caring for Child)	1 Modification is 1 Occurrence	An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to facilitate and fulfill caregiving responsibilities.	NAPIS FCSP 3 Supplemental Svcs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiving Services Registry (Caring for Child)	1 Hour is 1 Occurrence	An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to use personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and the self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively.	NAPISFCSP 3 Supplemental Svcs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes
Caregiving Emergency Cash / Material Aid (Caring for Child)	1 Assistance is 1 Occurrence	An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities.	NAPIS FCSP 3 Supplemental Svcs	OAA 373(b)(5) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Registered	No Changes

**FCSP - Grandparent Caring for Child
Access Assistance**

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Caregiver Outreach (Caring for Child)	1 Contact	An FCSP Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services (e.g., Caregiver InfoVan staff contacts outside of local market).	NAPIS FCSP 4 Access Assistanc	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiving Information and Assistance (Caring for Child)	1 Contact	An FCSP Access Assistance service that: (A) provides caregivers with information on services available within the communities, including caregiving information related to assistive technology and caring for older individuals at risk for institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous and refuse follow-up contact).	NAPIS FCSP 4 Access Assistanc e	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiver Interpretation / Translation (Caring for Child)	1 Contact	An FCSP Access Assistance service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for his caregiver).	NAPIS FCSP 4 Access Assistanc	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Caregiver Legal Resources (Caring for Child)	1 Contact	An FCSP Access Assistance service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving-related legal issues.	NAPIS FCSP 4 Access Assistanc	OAA 373(b)(2) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes

FCSP - Grandparent Caring for Child Information Services

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Public Information on Caregiving (Caring for Child)	1 Activity	An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter).	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes
Community Education on Caregiving (Caring for Child)	1 Activity	An FCSP Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).	NAPIS FCSP 5 Information Svcs	OAA 373(b)(1) NAPIS CDA FCSP Service Matrix	Title III E	N/A	Non-Registered	No Changes

Fiscally Allowable Administrative Activities

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
Program Development	N/A	Activities that either establish a new service or expand or integrate existing services.	Non-NAPIS	CDA Standard Agreement Exhibit A	Title III B	No	N/A	No Changes
Coordination	N/A	Activities that involve the active participation of the AAA staff to include liaison with non-OAA funded agencies and organizations for the purpose of avoiding duplication, improving services, resolving problems related to service delivery, and addressing the service needs of the eligible service population.	Non-NAPIS	CDA Standard Agreement Exhibit A	Title III B	No	N/A	No Changes

Service Category	Unit Measure ¹	Definitions	NAPIS Reference	Definition / Historical Reference ²	Primary Funding Source	Priority Service	Registered or Non-Registered ³	Summary of Changes
CARS / Data Reporting Systems	N/A	The purchase, development, and maintenance of software designed to meet the requirements of the California Aging Reporting System (CARS). Maintenance includes system patches and upgrades. Activities include training staff on data collection and systems.	Non-NAPIS		Title III B	No	N/A	New definition: the definition was revised to specify allowable activities for staff training on data collection and systems for AB 959 and other topics. The definition also clarifies that maintenance includes system patches and upgrades.
Emergency Preparedness	N/A	Develop long-term emergency plans.	Non-NAPIS		Title III B	No	N/A	No Changes
Senior Center Staffing	N/A	Assist with the operation of the multipurpose senior center by meeting all or part of the costs of compensating professional and technical personnel required for the operation of the center.	Non-NAPIS	Div 4000 Unit 42	Title III B	No	N/A	No Changes

For ADA compliance, additional notes for reporting requirements have been moved into a column titled "Reporting Requirements" as needed for each service category, instead of the color coordinated sections as follows:

- Light Blue: Denotes Cluster 1 services. Reporting requirements include unduplicated client counts by characteristic, ADLs/IADLs and service units.
- Dark Blue: Denotes Cluster 2 services. Reporting requirements include unduplicated client counts by characteristic and service units. For FCSP, ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.
- White: Denotes Non-Registered services. Reporting requirements include estimated unduplicated client counts and service units.
- Yellow: Denotes FCSP Registered services. Reporting requirements include unduplicated client counts by characteristic and service units for Caregivers. ADL/IADL information is required for Care Receivers served in "Caregiver Caring for Elderly" component only.
- Green: Denotes fiscally allowable administrative activities.

¹ AAAs must track the actual time services provided in their local database (i.e. minutes, fractions). All service units that are measured in hours must be reported as whole numbers (no fractions/partial units can be reported). When exporting this data to the California Aging Reporting System (CARS) the AAA's software system must round total service units for each client by month and by service category to the nearest integer (i.e. can round up or down). This should not affect the actual data in the AAA database, only the service unit totals in the CARS export files. Due to rounding, CDA expects minor service unit discrepancies (not to exceed 10 percent) between the AAA database and CARS. Also see "CARS Overview and Guidance" document.

² All references to Division 4000 and CDA FCSP Service Matrix are for historical reference only.

³ In addition to reporting service units, AAAs must also report unduplicated client enrollments/estimated audience size (see the color key above for further information).