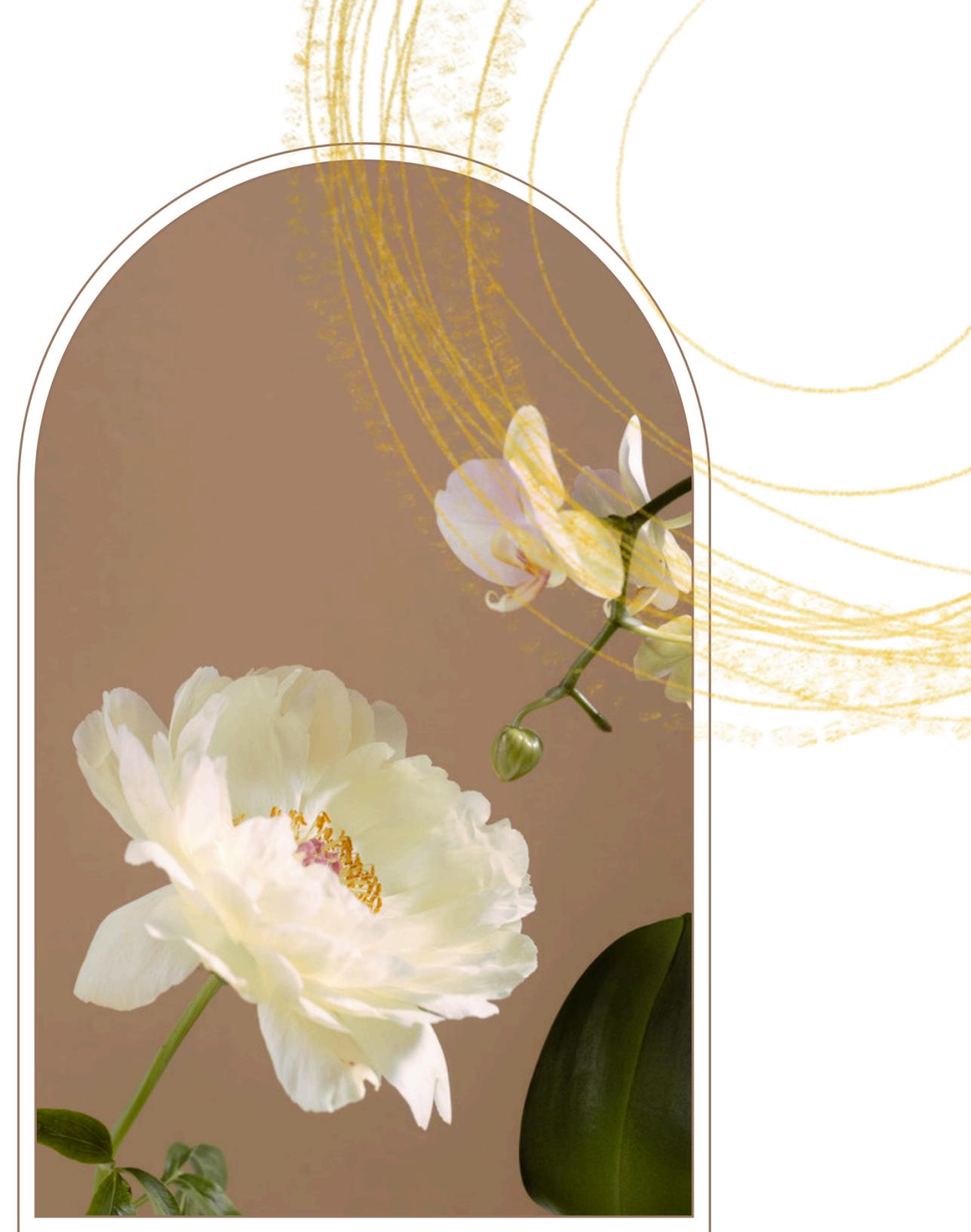


# Proposer's Conference

- Vintage Introduction
- Policy & Procedure Basics
- RFP Services
- Funding Expectations
- OAA-SYS Training





 VINTAGE

SERVICES FOR AGING WELL IN COLORADO



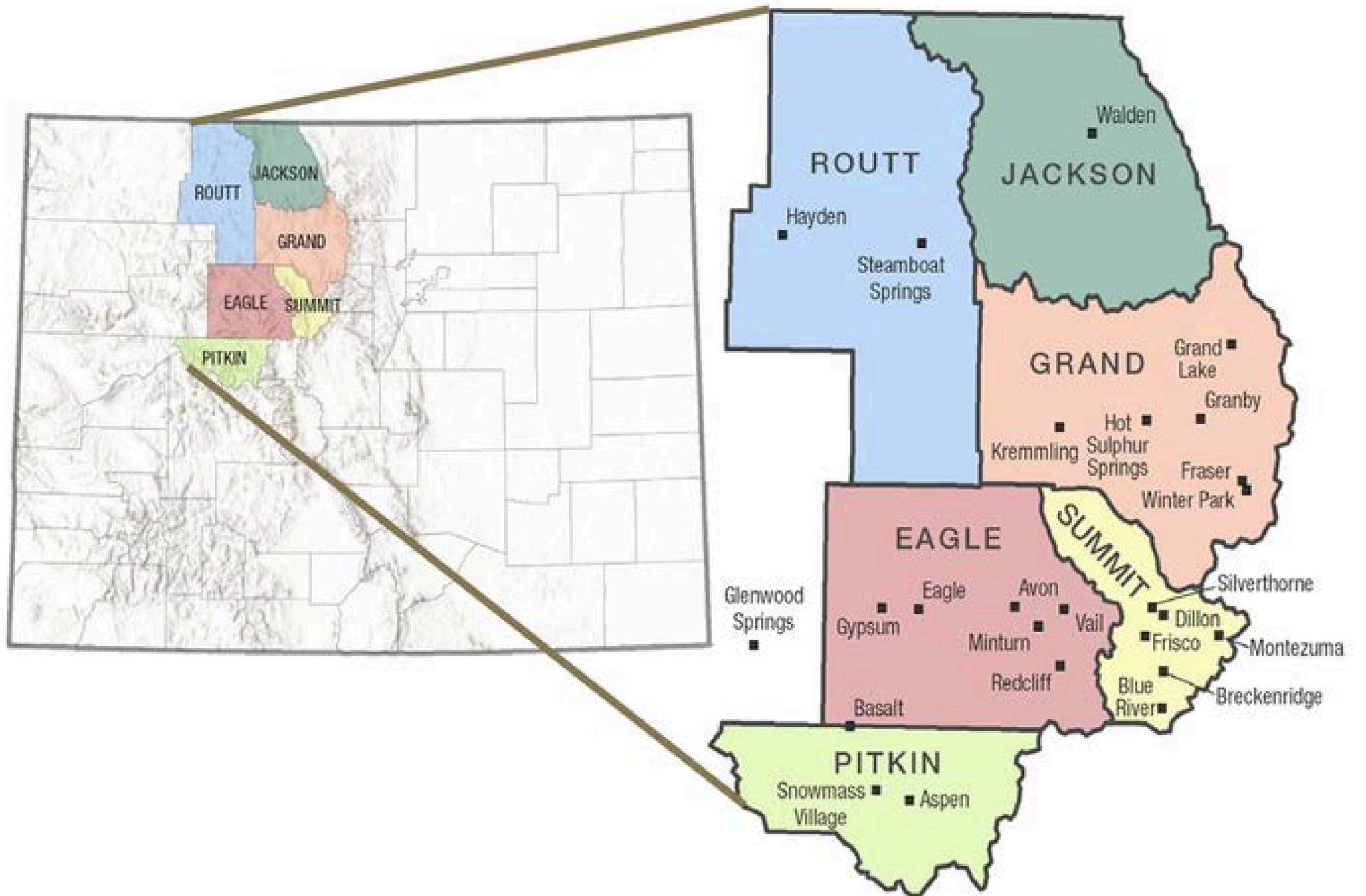
# NWCCOG



Membership Association of County & Municipal Governments  
30 member jurisdictions in six counties

- Broadband
- Economic Development District
- Elevator Inspection Program
- Energy Program (Weatherization)
- Northwest Loan Fund
- Regional Transportation Coordinating Council (RTCC)
- Water Quality/Quantity Committee
- Vintage Area Agency on Aging







Left to Right:  
Amanda, Ceci, Jonnah, Erin & Tina



# Vintage Services

## **Financial Voucher Programs**

- Transportation - Ceci
- In-Home Services - Ceci
- Caregiver - Ceci
- Dental - Amanda

**LTC Ombudsman** - Tina

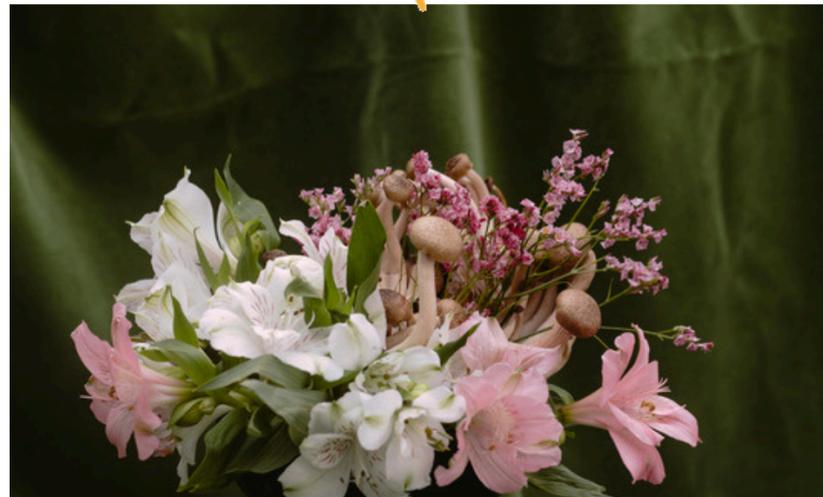
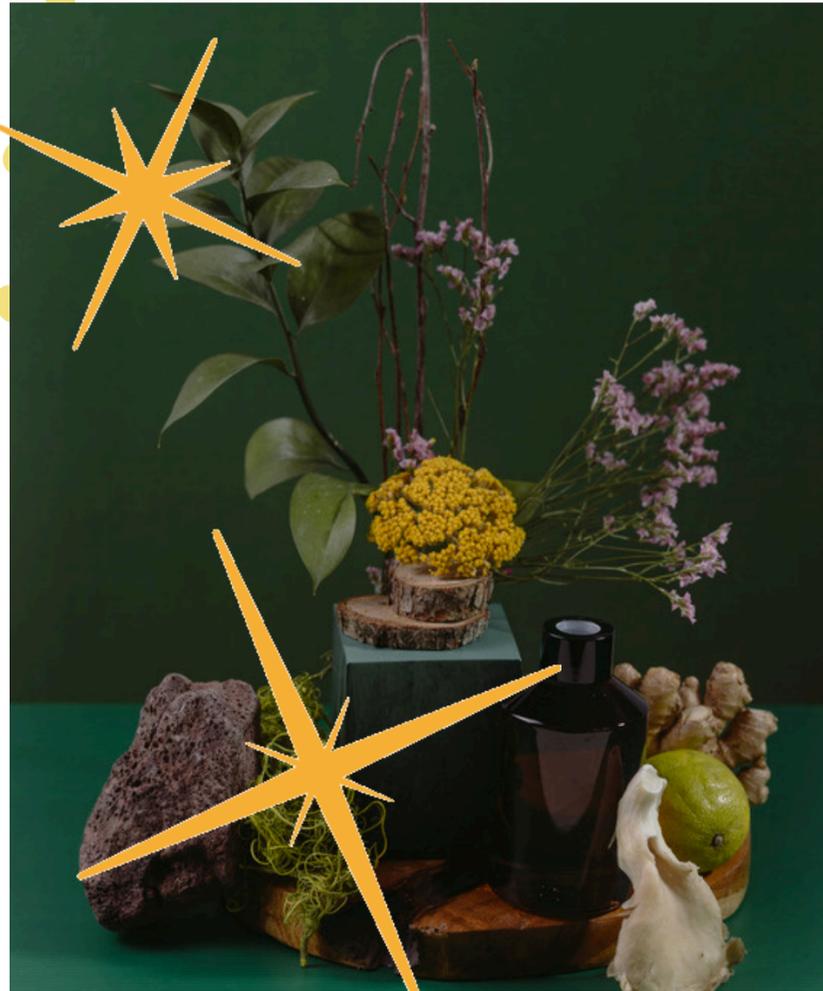
**SHIP Medicare Counseling** - Jonnah

**Caregiver Services & Training/Education** - Ceci

**Spanish Programming, Training/Education & Quarterly Enewsletter** - Ceci

**Information & Referral, Monthly Enewsletter & Facebook, Education Training & Conferences** - Vintage Team





# Vintage Service Providers

- Alpine Legal Services
- Colorado Legal Services (CLS)
- Eagle County Public Health - Healthy Aging
- Grand County Rural Health Network
- Jackson County Council on Aging (JCCOA)
- Mountain Family Center
- Pitkin County Adult & Family Services
- Pitkin County Senior Services
- Registered Dietitian - Kaitlyn Johnson, RD
- Registered Dietitian - Patti Murphy, RD
- Supporting Older Adults in Routt (SOAR - formally RCCOA)
- Summit County Community & Senior Center

# OVERVIEW

## **Marketing**

- The Momentum Monthly Enewsletter
- El Impulso Quarterly Enewsletter
- Facebook
- Website

## **Policy & Procedures**

- Policy & Procedure Manual
- State Unit on Aging Volume 10
- Older Americans Act

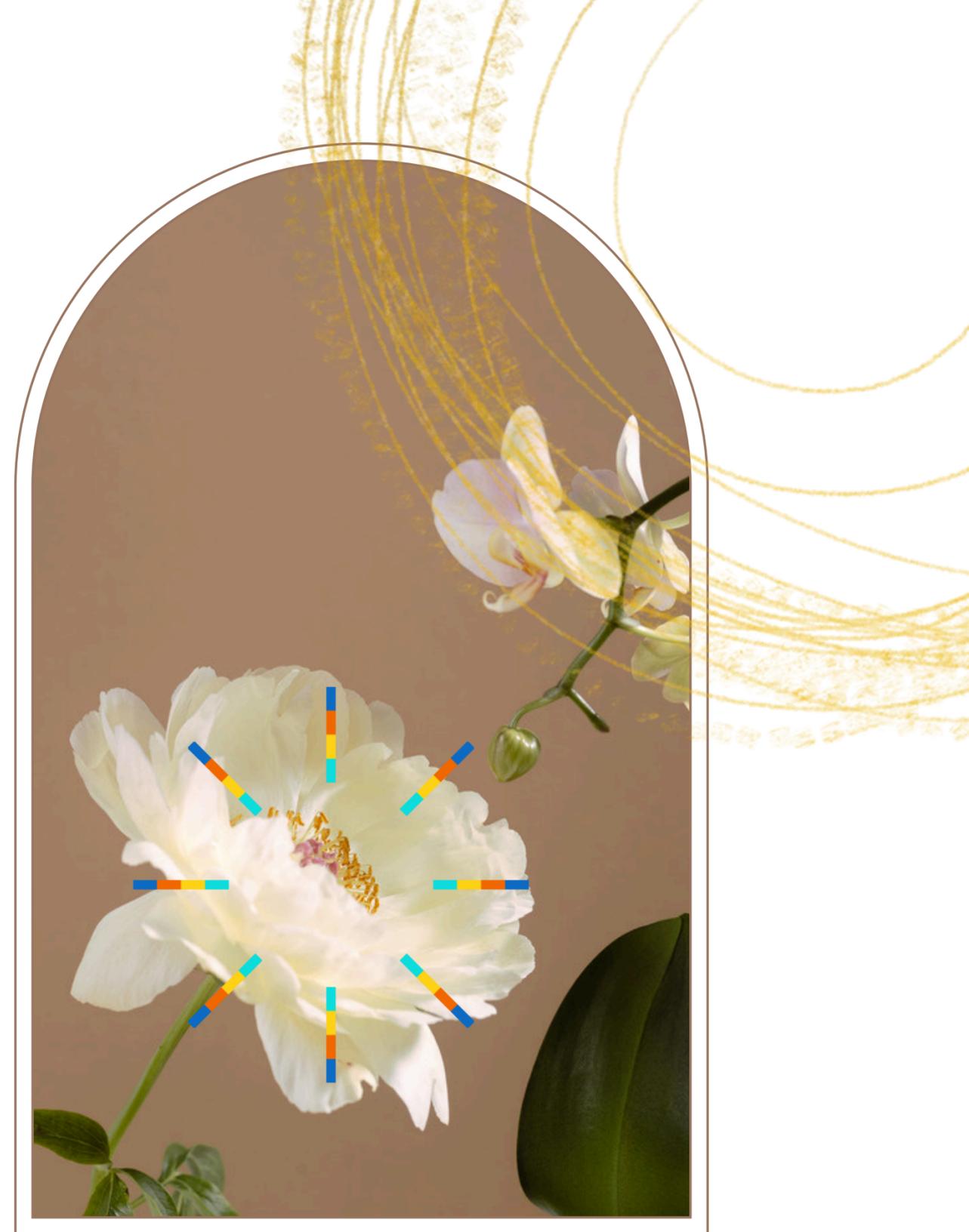
## **State & Local Plans**

- Vintage Four Year Area Plan
- SUA Four Year Area Plan
- CO Multi-Sector Plan on Aging

## **Aging & Policy Committee (APAC)**

## **Colorado Commission on Aging**

## **Regional Advisory Committee (RAC)**



# TARGETING

## Targeting

AAAs and providers are required to target the following special populations of older adults:

- Greatest economic need
- Greatest social need
- Low-income minority
- Limited English proficiency

# ECONOMIC NEED

## **Greatest Economic Need:**

the need resulting from **an income level at or below the Federal Poverty Level** and as further defined by State and area plans based on local and individual factors, including geography and expenses.

# SOCIAL NEED

## **Greatest Social Need:**

- Physical and mental disabilities
- Language barriers
- Cultural, social, or geographical isolation, including due to:
  - Racial or ethnic status
  - Native American identity
  - Sexual orientation, gender identity, or sex characteristics
- Housing instability, food insecurity, lack of transportation, or utility assistance needs
- Rural location
- Any other status that:
  - Restricts the ability of an individual to perform normal or routine daily tasks
  - Threatens the capacity of the individual to live independently
- Other needs as further defined by State and area plans based on local and individual factors.

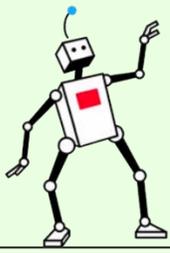
# SHORT TERM DISRUPTIONS

## Short Term Disruptions

- Notify the State Unit on Aging of emergency and non-emergency temporary service disruptions
- [Use this Google Form](#)
- Service disruption for congregate and home delivered meal programs that lasts two days or longer

The background features a light green horizontal band across the center. Above and below this band are white areas with abstract watercolor splashes in shades of green and teal. Scattered throughout the entire page are numerous small, colorful dots in red, blue, yellow, and orange, along with some thin, irregular lines in red and blue. A thin vertical black line runs down the center of the page, passing through the green band.

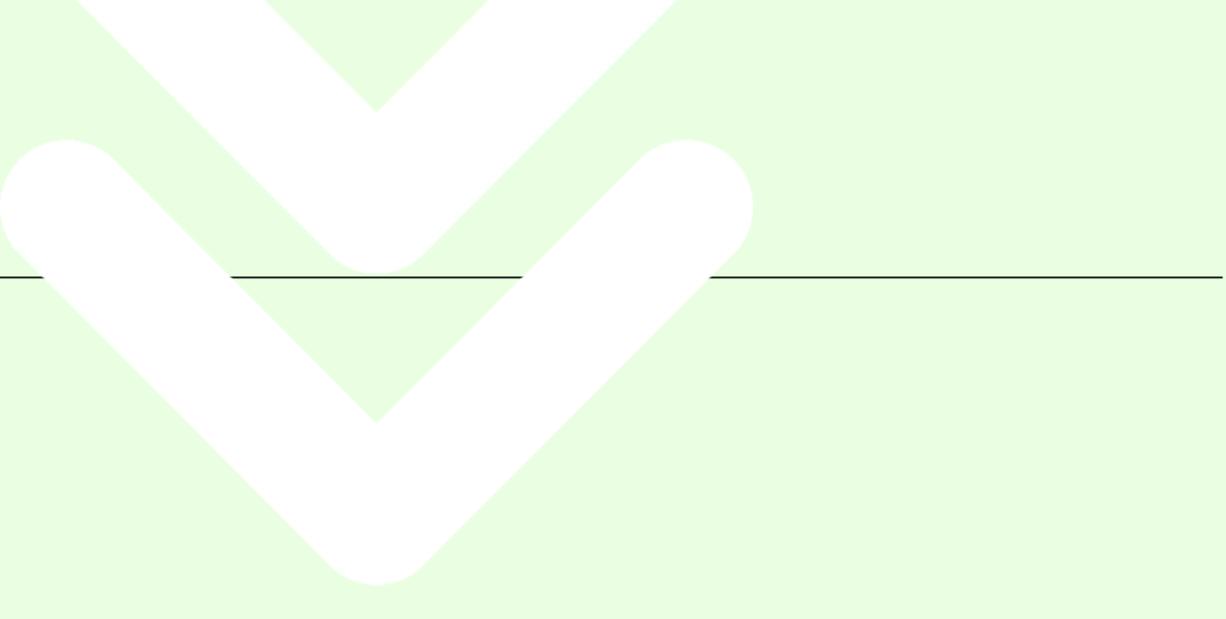
# Contracting with Vintage



# General Requirements

## COMPLIANCE WITH LAWS, RULES, AND POLICIES

- All applicable Federal, State, and local laws including the OAA, OCA, and CFR 200
- SUA Policy & Procedure Manual & Volume X requirements
- Ensure staff receive and maintain required training and meet safety standards
- Use funds in accordance with OAA/OCA and State rules/policies
- Permit audits, inspections, and monitoring by AAA/SUA.



# Annual Evaluations

## VINTAGE

- Vintage required to conduct an on-site or virtual evaluation annually
- 90 Day New Provider Evaluation

## STATE UNIT ON AGING (SUA)

- Annual evaluation which may be an on-site or desk evaluation. The services that the SUA focus on change annually.
- There may be additional evaluations/audits dictated by the federal or state government

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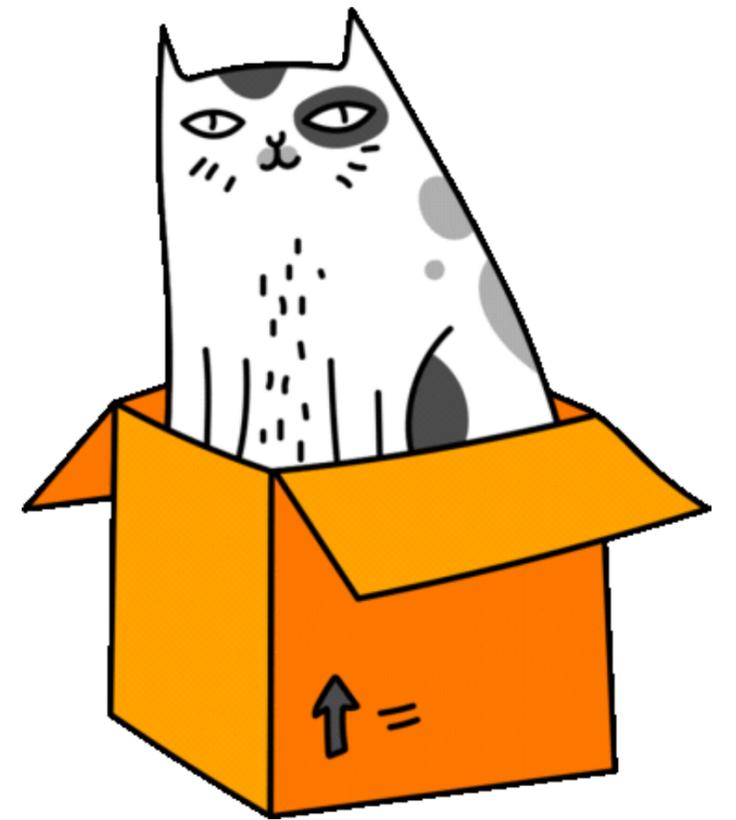
# Assessments



- Case Management
- Material Aid Food (restaurant vouchers & Bountiful Baskets)
- Congregate Meals
- Home Delivered Meals
- Nutrition Counseling
- Transportation
- Evidence Based Disease Prevention & Health Promotion

# Reassessments

- Case Management
- Home Delivered Meals
- Nutrition Counseling



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# Database



Providers are responsible for entering data, units, assessments, reassessments, rosters, etc into SUDS

SUDS - State Unit Database System

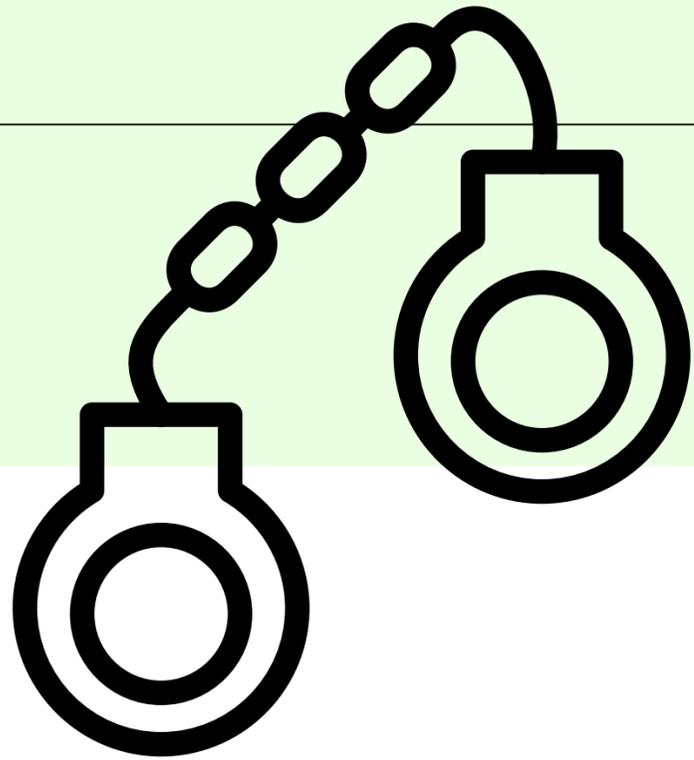


# Reimbursements

Client information due in SUDS on the 15<sup>th</sup> monthly

Reimbursement request due in OAASYS on the 15<sup>th</sup> monthly

# Background Checks



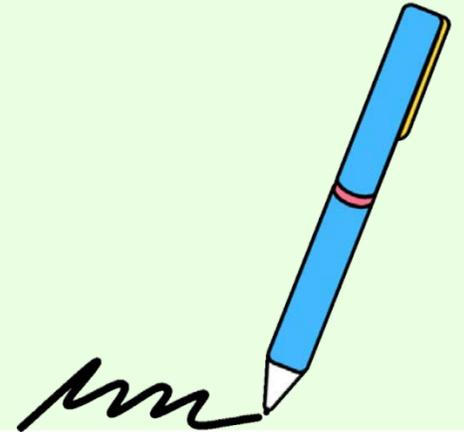
**CBI Background Check** - All employees and volunteers with one-on-one contact

**CAPS Background Check** - All employees with one-on-one contact

**MVR** - All employees and volunteers who drive clients

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# Required Documentation



Complaint & Grievance Policy & Log (even if empty)

Wait List Policy, Prioritization & Documentation

Voluntary Contribution Policy

CAPS Background Check Policy

Prioritization Screening Tool - Changes coming Soon

Performance Measure Surveys

Emergency Preparedness - Transportation & Meals



# Insurance

NWCCOG shall be named as additional insured on all policies

The State shall ALSO be named as additional insured on all commercial general liability policies



# Worker's Comp

Required if the contractor employs staff

No set \$ Limits

“Additional Insured” status doesn't exist on a Work Comp policy with any carrier, therefore a Waiver of Subrogation is required instead



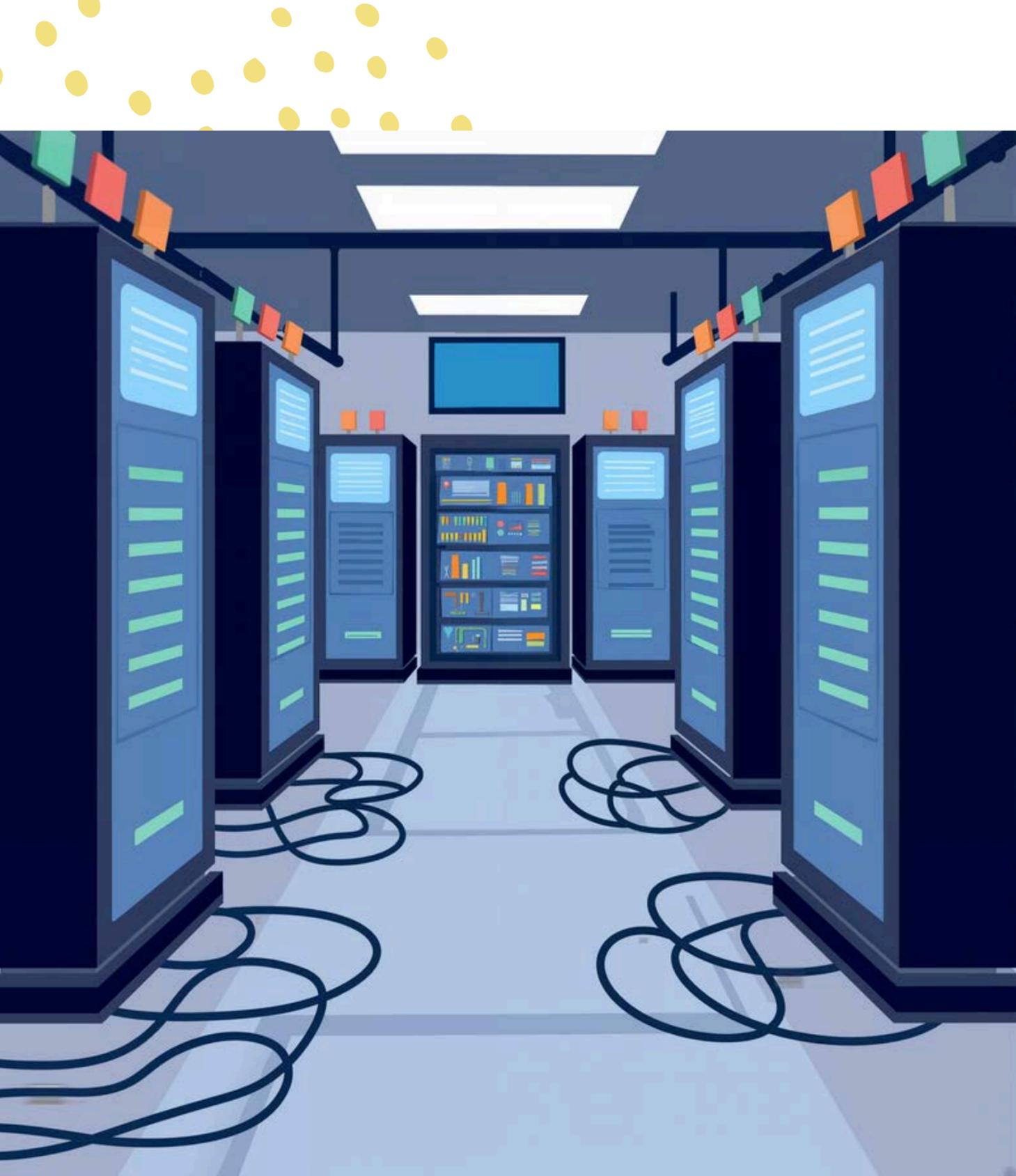
# Commercial General Liability

- \$1M each occurrence
- \$1M general aggregate
- \$1M products & completed operations aggregate
- \$50,000 any one fire



# Auto Liability

\$1M, unless waived by the state



# Protected Information

- \$1M each occurrence
- \$2M general aggregate
- 10 or fewer clients OR revenue < \$250K  
limit of \$50,000
- 25 or fewer clients OR revenue < \$500K  
limit of \$100,000



# Cyber/Net Security Privacy Liability

- NOT required
- More comprehensive than Protected Info
- Sometimes bundled with Protected Info

# Professional Liability Insurance

- Registered Dietitians & Legal Assistance Providers
- \$2M general aggregate





Required for all AAAs

Volunteer group of community members and older adults which advocate and provide suggestions to the AAA.

Must be at least 50% older adults.

Grant Review Committee

Four Year Area Plan

Meet at least 4x per year  
January / June / Sept / Nov  
Mix of virtual only and hybrid

# Regional Advisory Committee (RAC)

# Services



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# Case Management



- Registered Service
- Annual reassessments
- Case Managers must meet certain educational or work experience
- Case records must contain certain elements
- 1 unit = 1 hour (15 minute increments)



# Congregate Meals

- Registered Service / 1 unit = 1 meal
- NSIP - Tracking, Monthly Expenditures in OAASYS
- Guest Fees (\$17.77)
- Voluntary Donations
- Temp logs or TAPHC
- No Grab-and-Go meals
- All Meals Analyzed by RD
- Safety & Sanitization Checklist

# Evidence-based Disease Prevention and Health Promotion



- Registered Service
- Must meet the current definition of evidence based disease prevention & health promotion as defined by the NCOA.

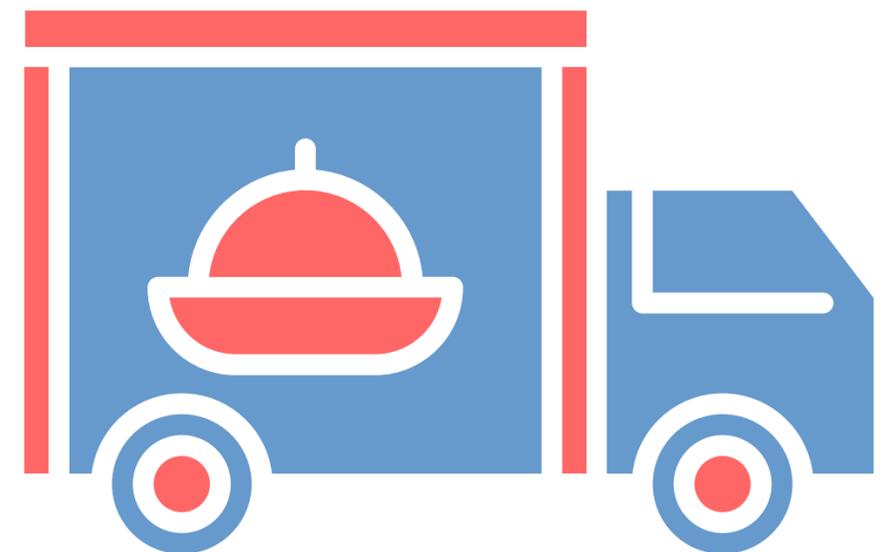
[www.ncoa.org/evidence-based-programs](http://www.ncoa.org/evidence-based-programs)

- 1 unit = 1 hour (15 minute increments)

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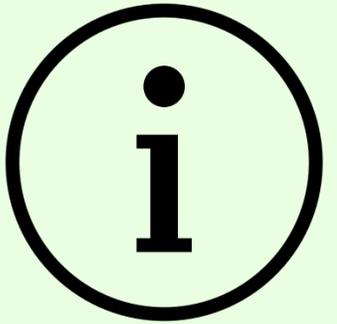
# Home Delivered Meals

- Registered Service - 6 month reassessments
- NSIP - Tracking, Monthly Expenditures in OAASYS
- Temp logs or TAPHC
- Voluntary Donations
- Guest Fees (\$12.99)
- All Meals Analyzed by RD
- Monthly Nutrition Education
- 1 unit = 1 meal



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# Information & Referral



- Aggregate Service
- A service that:
  - provides individuals with information on services available within the communities
  - links individuals to the services and opportunities that are available within the communities
  - to the maximum extent practicable, establishes adequate follow-up procedures.

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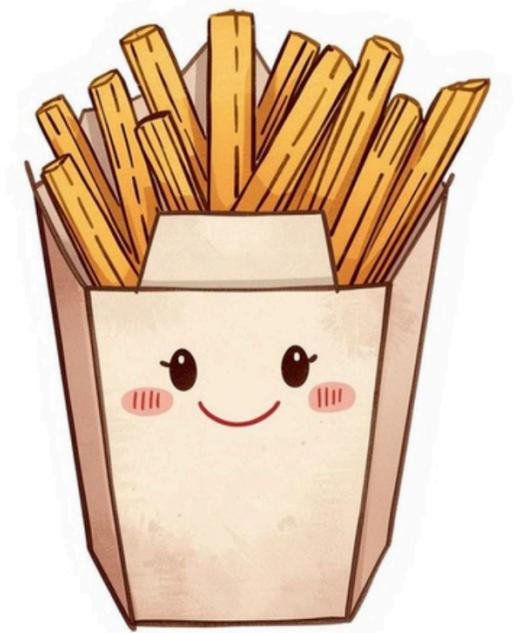
# Legal Assistance

- Aggregate Service
- Legal advice and representation by an attorney to older persons with economic and social needs
- 1 unit = 1 hour (15 minute increments)



# Material Aid - Food

- Registered service
- Food that doesn't meet strict congregate or home-delivered meal nutrition guidelines
- Restaurant vouchers
- Fresh fruits/veggies/dairy
- 1 unit = Per item



# Nutrition Counseling

- Registered Service
- Provided by a Registered Dietitian (RD)
- Individualized guidance to improve nutrition status with a measurable goal.
- 1 unit = 1 hour



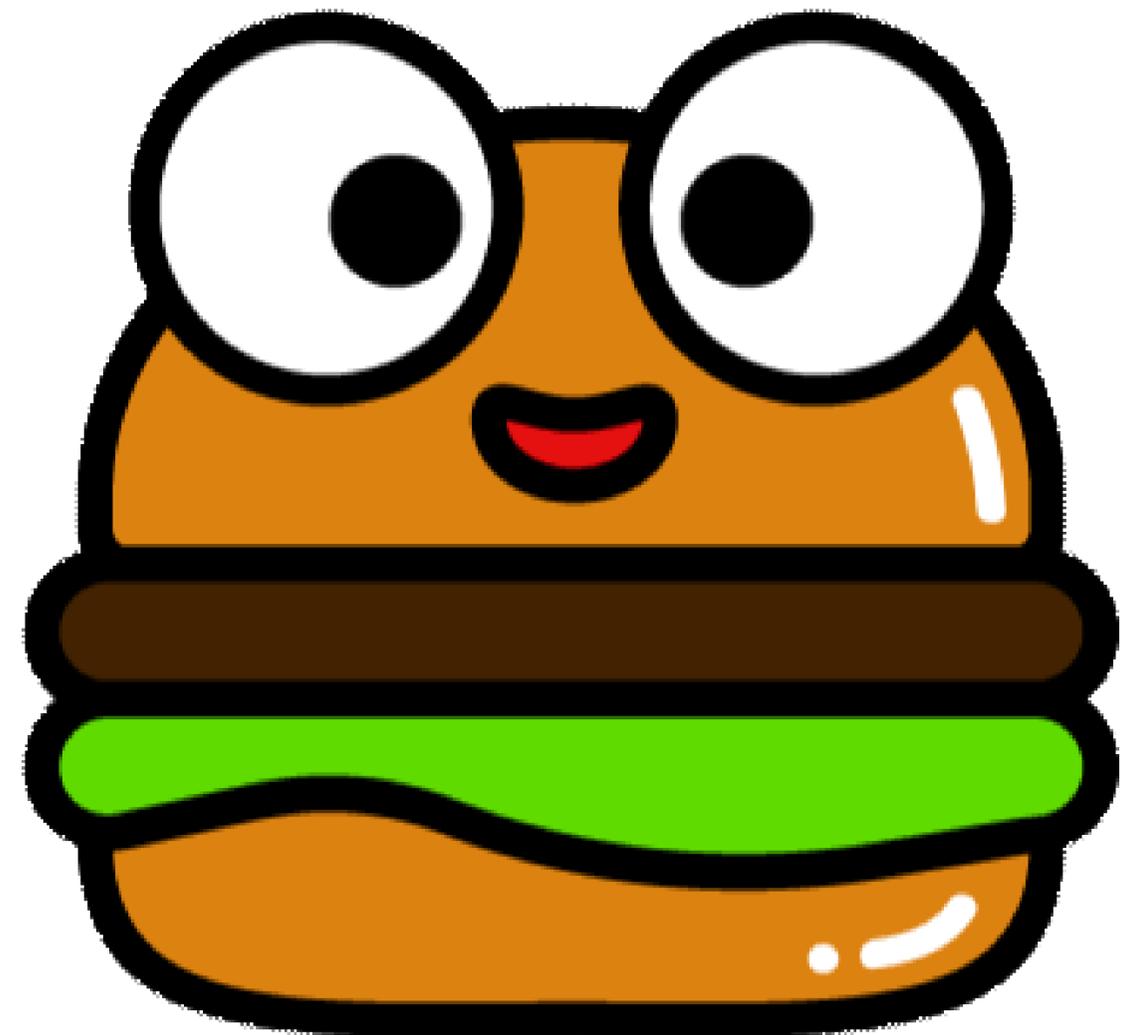


# Nutrition Education

- Aggregate
- Provided by a Registered Dietitian (RD)
- Evidence Informed
- C1: Presentations may be in-person (not during lunch) or virtual
- C2: Write/Reviews/Approves Monthly Nutrition Article
- Food Safety Presentations 2x a year to

# Nutrition Consultation

- Provided by a Registered Dietitian (RD)
- Menu Analysis & Substitutions
  - 3 meal sites / Eagle County
  - 1 meal site / Pitkin
  - 3 meal site / Routt
  - Home Delivered Meals
- Not registered / no units





# Transportation

- Registered service
- Transporting a person from one place to another
- 1 unit = 1 (one) way trip

# Caregiver Information & Assistance

- Provides caregivers & individuals with current info on opportunities and services available within their communities
- Only service with a 25% match requirement





# Timeline

**March 9:** RFP opens @ 11am  
Quiet Period begins @ 11am

**March 30:** RFP close at noon

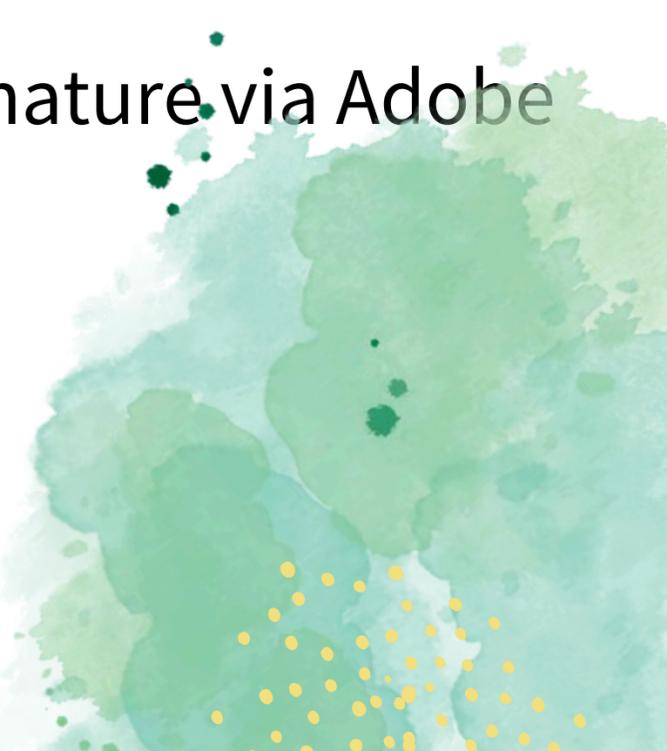
**April 20:** RAC Grant Review Committee Deliberates

**April 24:** Letters of Intent or Denial to providers

**May 22:** Contracts to providers for signature via Adobe

**June 22:** All contracts fully executed

**July 1:** New contracts begin



## ONE YEAR CONTRACT

July 1, 2026-June 30, 2027

## ONE YEAR OPTION LETTER

July 1, 2027-June 30, 2028

- Limiting monthly reimbursement requests
- Amendments
- New Contract

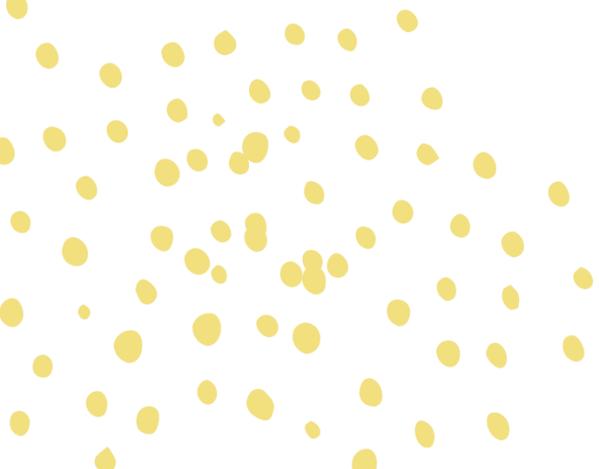
# Contracts





# How much funding should I request?

- Assume Flat Funding
- Ask for what you want (shows need)
- Budget in OAASYS for 1 year of funding
- Amendments for additional funding if possible



# Where to find info

Everything is posted on the Vintage Website

**<https://yourvintage.org/about/for-professionals/>**

- Proposer's Guide
- RFP Portal Link
- RFP Q&A Document- Quiet Period
- RFP Information Memo
- P&P Manual
- Conference Slides
- Recording of Conference
- Training Highlights

**Complete & Submit Proposal**

**<https://nwccog.oaa-sys.com/rfp/public/>**

