

## AgeOptions FY 14-16 Scoring Tool for Request for Proposal

Applicant: Service(s) Proposed:  Service Area:  Reviewer:	High (3)	Medium (2)	Low (1)	Does not meet expectations (0)	Weight applied to total points for section					
					Service	Service	Service	Service	Service	
<b>1. Needs Statement -</b> The Needs section clearly described the needs of the population to be served for this specific service.										
a. The applicant establishes a <u>need</u> for the service in the area.	The applicant provides demographic, needs assessment, service data and other data to establish the need for the service. They indicate the other agencies in the subarea which provide older adult services and how the proposed service will coordinate with that service mix.	The applicant provides at least two of the following: - demographic data, - needs assessment, service and/or - other data to establish the need for the service.	The applicant describes a general need for the service and provides one of the following: - demographic data, - needs assessment, service and/or - other data to establish the need for the service.	The applicant does not provide a clear explanation of need for the service or there is duplication of services in the area.						
b. The applicant identifies the <u>gaps</u> the proposed service will fill.	Not applicable for all Titles and Services	The applicant demonstrates what service gaps their proposed service will fill. The applicant provides specific data which support the gaps.	The applicant demonstrates the service is needed based on the fact that it was provided in the past.	The applicant does not describe a gap that the service will fill.						
Subtotal for Need Statement – Weight 1										
<b>2. Program Plan and Design (Quality)</b> The applicant clearly describes their plan and design for delivery of services.										
a. The applicant’s proposed program plan meets the <u>standards</u> outlined in the Request for Proposal.	Not applicable for all Titles and Services	The applicant meets all standards and future goals for the service. In addition, the applicant currently meets the standards.	The applicant’s proposal does not meet 2-3 of the AgeOptions standards.	The applicant’s proposal does not meet 4 or more of the AgeOptions standards.						
b. The applicant clearly describes the program <u>staffing</u> and how it is appropriate for the proposed service.	The applicant’s proposed staff, including supervisory and direct service, exceed the educational and credentialing requirements of the service.	The applicant’s proposed staff meet the educational and credential requirements of the service.	The applicant’s proposed staff require a waiver related to education or other credentials.	The applicant proposes staff which do not meet the education or credentials						
c. The applicant clearly describes the use of <u>customer feedback</u> and	The applicant describes how customer feedback is collected and used, describes the formal complaint process,	The applicant describes how customer feedback is collected and used. The agency participates in	The applicant describes how customer feedback is collected and used at least	The applicant relies on customer complaints for input and does not						

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how best practices are incorporated to meet the local community's preferences and needs.	and provides examples of data that have been used to improve programs. The applicant participates in local collaborating councils.	collaborating councils.	annually.	proactively seek input on at least an annual basis.					
d. The applicant currently has a strong <u>physical presence</u> in the community.  Outpost is defined as providing staff or volunteers in other parts of the service area in space that the agency may not own or rent in order to provide a physical presence and easy access for clients.	The applicant does 6 or more of the following: <ul style="list-style-type: none"> <li>- Has had an office in the proposed service area for over 10 years</li> <li>- Outposts in townships where they do not have an office</li> <li>- Are listed in the local phone book</li> <li>- Issues at least six news releases per year to the local paper or has a regular column/article in the paper</li> <li>- Has a website which references the community</li> <li>- Presents at least six times per year at meetings and clubs in the communities served</li> <li>- Has social media methods which references the community that service is provided</li> <li>- Applicant describes other methods that AgeOptions feels provides a strong physical presence in the community.</li> </ul>	The applicant does 3-5 or more of the following: <ul style="list-style-type: none"> <li>- Has had an office in the proposed service area for over 10 years</li> <li>- Outposts in townships where they do not have an office</li> <li>- Are listed in the local phone book</li> <li>- Issues at least six news releases per year to the local paper or has a regular column/article in the paper</li> <li>- Has a website which references the community</li> <li>- Presents at least six times per year at meetings and clubs in the communities served</li> <li>- Has social media methods which references the community that service is provided</li> <li>- Applicant describes other methods that AgeOptions</li> </ul>	The applicant does 1-2 or more of the following: <ul style="list-style-type: none"> <li>- Has had an office in the proposed service area for over 10 years</li> <li>- Outposts in townships where they do not have an office</li> <li>- Are listed in the local phone book</li> <li>- Issues at least six news releases per year to the local paper or has a regular column/article in the paper</li> <li>- Has a website which references the community</li> <li>- Presents at least six times per year at meetings and clubs in the communities served</li> <li>- Has social media methods which references the community that service is provided</li> </ul>	The applicant does not have a presence in the community.					

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		feels provides a strong physical presence in the community.								
e. The numbers of units proposed are <u>reasonable</u> given the proposed outreach activities and the applicant's past history.	The applicant proposes units that are achievable based on their past experience (e.g. same level as prior fiscal year adjusted for funding). If the units are higher than past experience, they provide a strong outreach plan with new activities that have not been tried that will help them achieve their units.	The applicant proposes units that are achievable based on their past experience (within 5-10% of the prior fiscal year adjusted for funding levels). If the proposed units are higher, the outreach plan does not appear that it will help them achieve units or the outreach plan has been proposed before.	The applicant proposes units that are not achievable based on their past experience (at over 11-15% of the prior fiscal year adjusted for funding levels)	The applicant proposes units that are 16% higher than their past experience (adjusted for funding levels).						
f. The numbers of clients proposed to be served are <u>reasonable</u> given the proposed outreach activities and the applicant's past history.	The applicant proposes clients that are achievable based on their past experience (e.g. same level as prior fiscal year adjusted for funding). If the clients are higher than past experience, they provide a strong outreach plan with new activities that have not been tried that will help them achieve their client projection.	The applicant proposes units that are achievable based on their past experience (within 5-10% of the prior fiscal year adjusted for funding levels). If the proposed clients are higher, the outreach plan does not appear that it will help them achieve clients or the outreach plan has been proposed before.	The applicant proposes clients that are not achievable based on their past experience (at over 11-15% of the prior fiscal year adjusted for funding levels)	The applicant proposes clients that are 16% higher than their past experience (adjusted for funding levels).						
Subtotal for Program Plan and Design – Weight 6										
<b>3. Outreach, Target Group, Community Support (Access)</b>										
a. The applicant provides a description of the <u>target population</u> including demographics of the area. The applicant describes how they	The applicant provides a clear description of the target population and supports the Older Americans Act targeting of services to Greatest Social and Economic need. The applicant provides details including	The applicant provides a description of the target population. At a minimum, they target services to Greatest Social and Economic Need groups at 100-125% of the ratio from the census	The applicant provides a description of the target population. They propose special targeting to Greatest Social and Economic Need groups at 75-99% of the ratio from census data.	The applicant provides a description of the target population. They do not propose special targeting to Greatest Social and Economic Need groups at						

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<p>will target services to Greatest Social and Economic need clients.</p> <p>The term “greatest social need” means the need caused by non-economic factors, which include—</p> <p>(A) physical and mental disabilities;</p> <p>(B) language barriers; and</p> <p>(C) cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, that—</p> <p>(i) restricts the ability of an individual to perform normal daily tasks; or</p> <p>(ii) threatens the capacity of the individual to live independently.</p>	demographics, needs assessment data, or other supporting data. The applicant proposes targeting services at 125% or more of the census data ratio.	data. For instance, if the Census indicates that 20% of the older adult population in the service area is Latino the applicant proposes that 20-25% of clients reached will be Latino.		below 74% of the ratio from the census.					
<p>b. The applicant provides a clear <u>outreach</u> plan to attract the target population and new participants, creates visibility, and uses a variety of methods such as social media and technology.</p>	The applicant describes a clear multi-faceted outreach plan which is innovative, feasible, uses a variety of methods and provides a strong rationale for how the plan will reach the target population.	The applicant describes a multi-faceted outreach plan that is feasible and provides for outreach activities throughout the year.	The applicant describes a basic outreach plan that is not multi-faceted and/or is not frequent.	The applicant does not provide an outreach plan. The applicant assumes that because they are present in the community, people will seek their services.					
<p>c. The applicant</p>	The applicant describes 5 or more	The applicant describes 2-4 existing	The applicant describes one	The applicant does not					

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provides a detailed plan of current <u>partnerships and collaborations</u> and how the applicant will use these for coordination and outreach	existing partnerships or collaborations which will assist them in outreach to target population.	partnerships or collaborations which will assist them in outreach to target population.	existing partnership or collaboration which will assist them in outreach to the target population. If the applicant is new to the area, the applicant provides solid plans for developing partnerships and collaborations.	have a plan to develop partnerships or collaborations.					
d. The applicant describes the cultural and language needs of the community and how the proposed program will meet the <u>cultural and language needs</u> of the community.	The applicant describes the cultural and language needs of the community and has bi-lingual <b>and</b> bi-cultural staff to meet the needs of their community.	The applicant describes the cultural and language needs of the community and has bi-lingual staff and other resources to meet the needs of their community.	The applicant relies on tele- interpreters or other agencies to meet the needs of their community.	The applicant does not provide a plan for meeting the cultural and language needs of the community.					
e. <u>For TCLIP applicants only:</u> The applicant describes how the proposed service relates to their organizational mission.	The applicant submits their mission and the proposed service is consistent. The applicant's mission is consistent with TCLIP services and the agency has been in existence for 5 or more years. For TCLIP agencies, the Board and Staff reflect at least 50% of the target group.	The applicant submits their mission and the proposed service is consistent with the mission.	The applicant submits their mission and the proposed service is not consistent with the mission.	The applicant does not submit their mission.					
Subtotal for Outreach, Target Group, Community Support – Weight 4									
<b>4. Performance History, Overall Organization (Capacity)</b> for applicants who have received funding from AgeOptions in the past, AgeOptions will review the applicant's past history to answer these questions. If an applicant was not funded by AgeOptions for this service, a reference letter or other documentation should be provided which addresses these issues. However, because a new applicant has not received funding from AgeOptions,									

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the maximum score they may receive in the "Performance History, Overall Organization is a score of 2 (Medium).									
a. In the last two years, the applicant has submitted <u>timely and accurate reports</u> to AgeOptions.	The applicant submitted their NAPIS and fiscal information on a timely basis with 1 exception or was granted an extension.	The applicant submitted their NAPIS and fiscal information accurately with 2-3 exceptions.	The applicant submitted their NAPIS and fiscal information accurately with 4-5 exceptions.	The applicant submitted their NAPIS and fiscal information accurately with 6 or more exceptions.					
b. In the last two years, the applicant has submitted their <u>audit</u> and there were no findings.	The applicant submitted the audit on time and there were no findings.	The applicant submitted their audit on time and there were one or two issues of non-compliance. There were no material weaknesses, significant deficiencies or repeat findings.	The applicant submitted their audit late and/or the audit showed three or more instances of non-compliance. There were no material weaknesses, significant deficiencies or repeat findings.	The applicant submitted the audit late and/or there were material weakness findings, significant deficiencies and/or repeat findings from the prior audit.					
c. In the last <u>monitoring</u> , the applicant met AgeOptions overall agency and fiscal standards.	The applicant's last program and fiscal monitoring had no finding for the overall program which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.	The applicant's last program and fiscal monitoring had 1-3 findings for the overall program which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.	The applicant's last program and fiscal monitoring had 4-6 findings for the overall program which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.	The applicant's last AgeOptions program and fiscal monitoring had 7 or more findings for the overall program which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.					
Subtotal for History, Overall Organization (Capacity) - Weight 3.5									
<b>5. Performance History, Specific to Proposed Services (Capacity)</b> if an applicant was not funded by AgeOptions for this service, a reference letter or other documentation should be provided which addresses these issues. However, because a new applicant has not received funding from AgeOptions, the maximum score they may receive in the "Performance History, Overall Organization is a score of 2 (Medium).									
a. The applicant has met or exceeded <u>projections</u> for units, clients, and targeting for the proposed service.	The applicant met or exceeded projections for units, clients and targeting for the proposed service in the proposed area for FY 12.	The applicant met 90% -99% of their projections for units, clients and targeting for the proposed service in the proposed area for FY	Not applicable	The applicant was 89% or more below their projections for units, clients and targeting for					

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		12.		the proposed service in the proposed area for FY 12.					
b. In the last <u>monitoring</u> , the applicant met AgeOptions standards for this service.	The applicant's last program and fiscal monitoring had no finding for the proposed service which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.	The applicant's last program and fiscal monitoring had no 1-3 findings for the proposed service which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing.	The applicant's last program and fiscal monitoring had no 4-6 findings for the proposed service which was material e.g. related to health and safety of client, lack of internal controls, poor service provision, inappropriate staffing..	The applicant's last AgeOptions program and fiscal monitoring had 7 or more finding for the proposed services.					
c. The applicant has a history of providing the proposed service in the <u>service area</u> proposed.	The applicant has provided this service in the proposed area for over 10 years.	The applicant currently provides the service in the proposed area.	The applicant does not currently provide the proposed service in the area but has specific plans for the service in the area. In addition, the applicant has provided the service in another suburban Cook area.	The applicant does not currently provide the proposed service in the area.					
Subtotal for Performance History, Specific to Proposed service - Weight 3.5									
<b>6. Budget – Section Not applicable for Elder Abuse</b>									
a. The proposed costs appear <u>feasible</u> to meet the project unit and client outcomes.	The proposed costs are not excessive, all staff and costs assigned to the program clearly have a direct impact on the delivery of services. The applicant requests 10% or less of AgeOptions funds for overhead costs. Not applicable for Elder Abuse.	The proposed costs are not excessive, all staff and costs assigned to the program impact the delivery of services. The applicant requests between 11-25% of overhead costs from AgeOptions funds. Not applicable for Elder Abuse.	The costs appear too high or low, staff and/or other expenses assigned to the program that doesn't appear to have direct impact/value. Or there may be excessive overhead costs assigned 26-29% of AgeOptions funds. Not applicable for Elder Abuse.	The applicant proposes overhead costs of more than 30% and/or Multiple staff and/or other expenses are assigned to the program that do not appear to have direct impact or value. Not applicable for Elder Abuse.					
b. The <u>budget justification</u> is clear, logical and describes	Not applicable for all Titles and Services Titles and Services	The applicant provides a clear budget justification that identifies	The applicant provides a budget justification which is not clear or	The applicant does not provide a budget					

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the program and cost allocation.		all expenses and the cost allocation plan. The cost allocation plan is clear, logical, and specific. Not applicable for Elder Abuse.	specific. Not applicable for Elder Abuse.	justification or the justification is inconsistent with presented budget. Not applicable for Elder Abuse.					
c. The level of <u>match</u> is at least 15%. Preference is given to local cash.	The applicant proposes over 25% match with at least 15% local cash. Not applicable for Elder Abuse	The applicant proposes 20% match with at least 5 % local cash. Not applicable for Elder Abuse	The applicant proposes 15% match and no local cash. Not applicable for Elder Abuse	The applicant does not propose 15% of match. Not applicable for Elder Abuse					
d. The proposed <u>project income</u> is realistic, reasonable, and consistent with previous years.	Not applicable for all Titles and Services	For 3b,3d and 3e- The proposed project income is realistic based on history. Not applicable for Elder Abuse	Not applicable for all Titles and Services	For 3b,3d and 3e-The proposed project income is not realistic. Not applicable for Elder Abuse					
e. The proposed <u>unit rate</u> is realistic, reasonable, and within a range appropriate to available funding and network history.	For 3b and 3d - Unit rate is 103% or below the average FY 12 AgeOptions unit rate.  For 3e, Elder Abuse – N/A	For 3b and 3d - The proposed AgeOptions unit rate is within 104-8% of the FY 12 average.  For 3e, Elder Abuse – N/A	For 3b and 3d - The proposed AgeOptions unit rate is 109-112% over the FY 12 average.  For 3e, Elder Abuse – N/A	For 3b and 3d - The proposed unit rate is over 113% of the FY 12 average.  For 3e, Elder Abuse – N/A					
Subtotal for Budget - Weight 3									
Total score for application.									