



STATE OF CALIFORNIA
DEPARTMENT OF REHABILITATION
Independent Living and Community Access Division

**REQUEST FOR INTEREST (RFI)
Community Living Fund Program
RFI 22-12-01**

CONTENTS

I.	AUTHORITY	2
II.	INTRODUCTION	2
III.	PURPOSE OF RFI.....	3
IV.	FUNDING OPPORTUNITY	4
V.	DESCRIPTION OF SERVICES AND ACTIVITIES.....	7
VI.	RFI KEY ACTION DATES	13
VII.	DETAILED SCHEDULE OF RFI EVENTS.....	14
VIII.	RESPONSE SUBMISSION REQUIREMENTS.....	16
IX.	REVIEW AND AWARD PROCESS	18
X.	ATTACHMENT A: RESPONSE CHECKLIST	19
XI.	ATTACHMENT B: COVER SHEET	20
XII.	ATTACHMENT C: NARRATIVE OUTLINE.....	21
XIII.	ATTACHMENT D: LIST OF COUNTY OR COUNTIES TO BE SERVED.....	25
XIV.	ATTACHMENT E: KEY PERSONNEL	26
XV.	ATTACHMENT F1: TRANSITION COST PROPOSAL AND NARRATIVE.....	27
XVI.	ATTACHMENT F2: DIVERSION COST PROPOSAL AND NARRATIVE.....	29
XVII.	ATTACHMENT G: PROOF OF INSURANCE	31
XVIII.	ATTACHMENT H: PROOF OF 501(C)(3) STATUS.....	32

I. AUTHORITY

The Department of Rehabilitation (DOR) received a one-time \$10 million dollar award to the State General Fund, available from July 1, 2022 through June 30, 2025, for the Community Living Fund (CLF) Program. The CLF Program advances efforts of California's Master Plan on Aging (MPA) to prepare for its diverse aging population by 2030 and addresses long-standing system challenges impacting California's older adults, people with disabilities, and caregivers. DOR is issuing this Request for Interest (RFI) for the CLF Program for the institutional transition and diversion services for people with disabilities, including older adults.

II. INTRODUCTION

DOR is seeking 501(c)(3) non-profit organizations to provide services to individuals with disabilities, including older adults, through the CLF Program. This program advances California's MPA and No Wrong Door (NWD) models by expanding the capacity of disability and aging services and programs to provide person-centered institutional transition and diversion services for people of all ages and with any type of disability who do not qualify for existing services.

Organizations providing CLF Program services will coordinate with existing private and public systems and programs that provide institutional transition and diversion services and long-term services and supports (LTSS) to expand the availability of services. The purpose of the CLF Program funding is to build upon and add to existing services, systems, and funding (supplement) and not replace or take the place of existing funding (supplant).

The CLF Program is a "bridge" program that expedites the provision of goods or services not available through other means to individuals who need assistance to either leave an institution or avoid future institutionalization. Individuals living in institutions or at risk of going into an institutional setting will benefit from the timely wraparound service coordination and access to supports for community living provided through the CLF Program. The CLF Program will provide the necessary flexible funding to individuals to assist with short-term costs including rent, assistive technology, personal care assistance, resource and program navigation, and emergent needs such as food, utilities, and other related necessities not available through other means.

III. PURPOSE OF RFI

The CLF Program will reduce unnecessary institutionalization for people with disabilities, including older adults, by providing transition and diversion assistance, services, and supports for eligible individuals to live in their own homes and communities. The CLF Program will fund services, or a combination of goods and services, to help eligible individuals who are currently in or at risk of being institutionalized. The CLF Program will:

- Provide temporary financial support for home and community-based LTSS beyond what is currently available.
- Offer flexible funding to create “wraparound” services that provide essential community-based assistance and support.
- Facilitate the development of service delivery models that strengthen community-based LTSS.
- Supplement, not supplant, existing funded services and programs to fill funding gaps until new sources of financial support for community-based LTSS can be secured through available services and programs.

Through this RFI, DOR will identify and enter into grant agreements with up to 50 501(c)(3) non-profit agencies whose current demonstrated core mission is serving people with disabilities and older adults. Such programs include but are not limited to the following:

- Aging and Disability Resource Connections
- Area Agencies on Aging
- Independent Living Centers
- Older Individuals Who are Blind programs
- Traumatic Brain Injury programs
- Other disability and aging non-profit organizations

Selected providers will be required to provide person-centered institutional transition and diversion services, assess individuals for needs and eligibility of services, coordinate services with other existing systems designed to support people with disabilities including older adults (consumers) to live in the community, reduce duplication of services, and improve service

coordination. These grants require a multi-partner approach involving other community-based programs and organizations.

Through its providers, the CLF Program intends to provide transition and diversion services to 1,360 consumers until June 30, 2025, unless all available funds are expended before that date. DOR will reimburse providers up to \$5,000 for the purchase of goods and services for each consumer served. In addition, providers will be reimbursed up to \$2,500 for diversion service coordination and \$4,500 for transition service coordination for each consumer receiving CLF Program services. The outcome measures will assess the impact of increasing community living for consumers and will examine quality of life and ability to remain in the community through regular reporting after each transition and diversion service. DOR reserves the right to negotiate to serve as many consumers as possible.

IV. FUNDING OPPORTUNITY

The proposed term of the grant is February 1, 2023, or upon approval (whichever date is later) through June 30, 2025. DOR will award zero-cost grants statewide to eligible RFI respondents to conduct program activities. Interested providers must specify one or more counties in which they plan to provide services.

DOR reserves the right to award grants on a continuous basis to ensure adequate quality of services and an adequate quantity of providers are available to achieve statewide service coverage.

The spending caps for CLF Program services and staff expenses for service coordination are subject to change.

Eligible Respondents must satisfy the following:

- Provide proof of current 501(c)(3) non-profit status.
- Demonstrate the organization's core mission is serving people with disabilities and/or older adults.
- Provide resumes for staff dedicated to the CLF Program, including their knowledge and experience in providing person-centered transition and diversion services to people with disabilities and/or

older adults. If the position is currently vacant, provide the job description.

- Have staff member(s) dedicated to institutional transition and diversion services. This requirement can be met through other funding sources or through reimbursements from the CLF Program for service coordination.

Expenses Eligible for Reimbursement

Reimbursable CLF Program expenses fall into two categories:

(1) Purchase of Goods and Services and (2) Staff Expenses for Service Coordination.

Purchase of Goods and Services

Providers may be reimbursed up to \$5,000 per consumer for direct purchase of goods and services for institutional transition and diversion. These include, but are not limited to, the following:

- Assistive technology and training
- Household necessities
- Moving expenses
- Occupational or physical therapy assessments
- Orientation and mobility training
- Personal care assistance not covered by In-Home Supportive Services (IHSS)
- Rent and utilities
- Transportation
- Other services or items deemed necessary for institutional transition and diversion

Exceptions to the reimbursement limit may be made on a case-by-case basis by DOR CLF Program staff.

Staff Expenses for Service Coordination

Up to \$4,500 may be used for staff expenses dedicated to service coordination for each transition and \$2,500 for each diversion.

Providers with existing funding sources for staff time for institutional transition and diversion services are encouraged to utilize those funding sources first. Providers can use CLF Program Service Coordination funds to expand their existing capacity to provide these services.

Staff time for performing eligible CLF Program activities may include, but is not limited to, the following:

- Outreach to individuals and institutions
- Consumer intake and assessments
- Service coordination to transition consumers out of an institutional setting to community living
- Service coordination to divert consumers from going into an institutional setting
- Travel expenses related to service delivery. Reasonable expenses include travel to a consumer's home, institutions, or other locations for the purpose of transitioning an individual from an institution or diverting them from going into an institutional setting. Travel costs cannot exceed the California Department of Human Resources (CalHR) designated rates for excluded employees. Visit the [CalHR website](#) for more information.
- Time spent procuring goods and services for consumers
- Follow-up and feedback with consumers
- Data tracking and reporting
- Other activities necessary for successful institutional transition and diversion services

Staff expenses for service coordination will be reimbursed for the services provided to each eligible individual at the following rates:

- Up to \$4,500 for each consumer transition as detailed in Attachment F1: Transition Cost Proposal and Narrative
- Up to \$2,500 for each consumer diversion as detailed in Attachment F2: Diversion Cost Proposal and Narrative

Payment is issued in arrears upon submission of a complete and accurate invoice and the required supporting documentation. Receipts will be

required when submitting invoices for reimbursement for expenses related to non-personnel purchases of goods and services.

The CLF Program services are contingent upon the availability of program funding. If funding for this program is reduced or depleted, DOR shall have the option to cancel the grant with no liability to the State. If this occurs, this grant will be considered invalid and have no further force or effect.

Grantees shall not be obligated to perform any provisions of this grant.

Grantees will be notified immediately, in writing, when funding is depleted.

V. DESCRIPTION OF SERVICES AND ACTIVITIES

CLF Program providers will provide eligible individuals with person-centered services, assess individuals for needs and eligibility of services, and coordinate services with other systems designed to support people with disabilities, including older adults, to live in the community to avoid duplication of services and improve services coordination.

Funding may be used for any of the following: transition services; diversion services; purchase of goods and services including equipment and training; physical location improvement; access to community services; professional services; and staff expenses for service coordination costs when no other funding sources exist.

Transition Services

Funding may be used to assist consumers to transition into the community from one of the following types of institutional facilities:

- Licensed skilled nursing facility
- Intermediate care facility for the developmentally disabled
- State hospital for the mentally ill
- Developmental center
- Rehabilitation hospital
- California Veterans home

Consumers in acute care hospitals would be eligible when they are at-risk of going into an institutional setting listed above. This can include connection to LTSS that can improve social, emotional, and physical well-being of a consumer.

Diversion Services

Funding may be used to assist consumers at-risk of being institutionalized or entering an institutional setting by providing services, supports, and/or equipment that would prevent them from going into a higher level of care or losing their housing, and/or formal or informal support systems. This can include connection to LTSS that can improve social, emotional, and physical well-being of a consumer.

To qualify for diversion services, an individual must meet, or be at risk of meeting, the following criteria:

- Have a functional impairment in a minimum of two activities of daily living (ADLs): eating, dressing, transfer, bathing, toileting, and grooming; or
- Have a medical condition that would require the level of care that would be provided in a nursing facility; or
- Be unable to manage their own affairs due to emotional and/or cognitive impairment.

Purchase of Goods and Services

The purchase of goods and services includes equipment purchase and training, physical location improvement, access to community services, professional services, and other services that support the consumer's goal for institutional transition or diversion.

- **Equipment Purchase and Training**

Funding may be used to purchase equipment or assistive technology to prevent institutionalization, facilitate a transition, or assist consumers in activities of daily living. Training on the equipment or assistive technology purchased may be provided to the consumer.

- **Physical Location Improvement**

Funding may be used for home modifications including doors, paths of travel, installation of ramps, push button door openers, flashing alarms, grab bar installation, bathroom accessibility modifications, or other modifications needed to make the consumer's home more accessible.

Funding may be used for basic household setup costs such as bedding, food staples, dishes, bathroom supplies, furniture, and toiletries.

Funding may be used for moving expenses, first month's rent and deposit, credit check fees, utility setup and startup fees, pest inspections and extermination, or other related household goods and services.

- **Access to Community Services**

Funding may be used for transportation to services that support transition or diversion. This may include transportation to doctors and healthcare facilities, shopping for food and basic necessities, and other services and programs necessary for community living where no other transportation service exists.

Funding may be used for orientation and mobility training to assist consumers in navigating their community efficiently and safely.

- **Professional Services**

Funding may be used to support personal care assistance needs until long-term solutions can be put into place through In-Home Supportive Services (IHSS) Program, private pay, or other sources.

Funding may be used for assessments and services from occupational, physical, or behavioral health therapists.

- **Other Services**

Other items, services, or supports necessary for institutional transition and diversion.

Staff Expenses for Service Coordination

Staff time may be used to conduct outreach to individuals who can benefit from the CLF Program and to work with consumers to access services. Service coordination includes conducting intakes and assessments to determine eligibility, person-centered plan development, and follow-up services and staff time to collaborate with other organizations and programs to address a consumer's needs for short-term LTSS to transition or prevent institutionalization. It includes identifying other services that the consumers are eligible for and connecting them with those services. It also includes coordination of the purchase of all proposed goods and services. Service coordination may require a multidisciplinary approach with institutional facilities, discharge planners, case managers, family members,

community partners, doctors or other medical staff, stakeholders, and others for the purposes of transitioning individuals to the community and/or preventing them from going into an institutional setting.

Selected providers are expected to perform the following activities:

- Conduct outreach to institutions, LTSS providers, and individuals.
- Identify individuals in need of transition or diversion services.
- Conduct intake and assessment of individuals to determine the need for institutional transition services and the risk of institutionalization for diversion services.
- Verify the individual is eligible for the CLF Program based on the following funding criteria:
 - Individuals with disabilities including older adults with an income at or below 300% of the federal poverty level with certain medical or disability expense deductions and cannot afford out-of-pocket costs associated with transition and diversion.
 - Individuals with Medi-Cal if their needs are beyond what is covered by Medi-Cal.
- Document and maintain records that confirm other funding avenues (including Medi-Cal) are not available.
- Develop person-centered NWD strategies to coordinate CLF Program services with existing LTSS providers to streamline access to services and reduce duplication.
- Develop person-centered goals and a plan with consumers to drive delivery of transition and diversion services.
- Assist consumers to transition into the community from the following types of institutional facilities:
 - Licensed skilled nursing facility
 - Intermediate care facility for individuals with developmental disabilities
 - State hospital for the mentally ill

- Developmental center
 - Rehabilitation hospital
 - California Veterans Home
 - Acute Care Hospitals
- Provide consumers at risk of institutionalization with services, support, and equipment to prevent them from going into a higher level of care or losing their housing and support systems.
- Connect consumers to LTSS for ongoing support to live independently and safely in their community of choice.
- Identify barriers to community living and gaps in services to utilize CLF Program services.
- Be familiar with and develop relationships with local institutional transition, diversion, and LTSS resources.
- Work with other organizations, agencies, and providers to braid multiple public and private funding streams to support the total cost of the consumer's institutional transition and diversion goal to expand services and reduce duplication.
- Follow up with consumers.
- Fulfill reporting requirements.
- Submit timely invoices to DOR for reimbursement with accurate receipts detailing expenses for goods and services.
- Retain all financial and program-related records, including receipts, for at least three years after the grant funding period ends.

Reporting Requirements

Providers will submit the following:

- Request for utilization of CLF Program for each consumer for DOR approval before services are provided.
- Timely invoices, with receipts detailing expenses for each completed transition or diversion.
- The number of successful transitions and diversions completed each month.

- A survey with each consumer after transition or diversion services have been provided and a second survey six (6) months later to determine consumer outcomes.

VI. RFI KEY ACTION DATES

Listed below are the key action dates for the RFI. DOR will notify Respondents about any RFI Key Action Date changes by posting an addendum with revisions to the DOR website. Please check the [DOR Website](#) regularly.

Event	Responsible Party	Date / Time
RFI release date	DOR	December 1, 2022
RFI question submission deadline	Respondent	December 20, 2022
RFI Respondent Teleconference	DOR, Contracts and Procurement	December 21, 2022 at 11:00 AM
RFI response submission due	Respondent	January 13, 2023
Response screening and evaluation	DOR	January 17 – 20, 2023
Notice of Intent to Award	DOR	January 25, 2023
Grant period	DOR	Upon approval or February 1, 2023 (whichever date is later) – June 30, 2025

VII. DETAILED SCHEDULE OF RFI EVENTS

RFI Release Date

The RFI release date is December 1, 2022.

RFI Question Submission Date

Questions regarding this RFI must be submitted to the CLF Program team via email to: Grants@dor.ca.gov

Question must be submitted by December 20, 2022 and include the following in the subject line: Question for RFI 22-12-01

RFI Respondent Teleconference

An RFI Respondent teleconference will be held on December 21, 2022 at 11:00 AM to respond to questions submitted to DOR. Attendance at the teleconference is optional. All questions and answers will be posted on DOR's website. Click here to view the [DOR Website](#)

RFI Respondent Teleconference Zoom Meeting Information

When: December 21, 2022 at 11:00 AM Pacific Time (US and Canada)

Respondents can register in advance for this meeting. To register click on the [Zoom registration page](#).

After registering, you will receive a confirmation email containing information about joining the meeting.

Response Due

Electronic versions of the responses are due by January 13, 2023. Responses received after this date may be accepted and prioritized by the date and time the response was received.

Responses to this RFI must be emailed to DOR to Grants@dor.ca.gov with the subject line: RFI 22-12-01 Response Package.

Response Evaluation

DOR will award grants to Respondents who satisfy eligibility requirements as determined in the Section IV Funding Opportunity and who submit a complete response as outlined in the Section VIII Response and Submission Requirements.

Once selections are completed, the CLF Program team will work with selected parties to develop the grants. DOR reserves the right to add providers on a continuous basis to ensure adequate quality of services amongst providers and adequate quantity of providers to achieve statewide service coverage.

Grant Period

DOR will award grants to qualified Respondents, subject to funding availability, starting February 1, 2023, or upon approval (whichever date is later) through June 30, 2025. DOR intends to award grants to up to 50 organizations.

DOR reserves the right to add providers on a continuous basis to ensure adequate quality of services amongst providers and quantity of providers to achieve statewide service coverage.

VIII. RESPONSE SUBMISSION REQUIREMENTS

All eligible Respondents interested in applying for the CLF Program grant must follow the instructions outlined below.

Responses must be in accessible formats

Further information on making documents accessible is available by clicking on the [DOR website](#)

To be considered for funding, responses must comply with the instructions and criteria provided in this RFI.

Required Documents:

Each response submission must include the following:

1. Response Checklist (Attachment A)

The Response Checklist is to be used by the Respondent to ensure all the required documents are submitted.

2. Coversheet (Attachment B)

The cover sheet is used to identify each entity applying for a grant and needs to be signed by an authorized representative. Authorized Representative is the official within the respondent's organization with the legal authority to give assurances, make commitments, enter into contracts, and execute such documents on behalf of the respondent.

3. Narrative Outline (Attachment C)

The Narrative Outline must identify the lettered section being answered, followed by its response to that question. Response questions do not need to be restated within the narrative. The narrative has a seven-page limit (8 ½" X 11" paper size), single sided, single-spaced, and 14-point Arial font.

4. List of County or Counties to be Served (Attachment D)

A list of county or counties in which CLF Program services will be provided.

5. Key Personnel (Attachment E)

Provide resumes for key personnel who will provide CLF Program services during the grant period. If a position is vacant and will be filled to provide services under this grant, provide the job description or duty statement. This will not count towards the Narrative Outline page limit.

6. Transition Cost Proposal and Narrative (Attachment F1)

Complete this worksheet to establish the all-inclusive reimbursement rate for staff time and travel for each CLF Program Transition.

Provide job titles of key personnel that will provide CLF Program transition services during the grant period. Include the breakdown of the cost of personnel listed and a narrative of work to be performed during the term of the grant.

7. Diversion Cost Proposal and Narrative (Attachment F2)

Complete this worksheet to establish the all-inclusive reimbursement rate for staff time and travel for each CLF Program Diversion.

Provide job titles of key personnel that will provide CLF Program diversion services during the grant period. Include the breakdown of cost of personnel listed and narrative of work to be performed during the term of the grant.

8. Proof of Insurance Coverage (Attachment G)

Provide proof of insurance including General Liability, Worker's Compensation, and, if applicable, Professional Liability. See Attachment G for a sample certificate.

9. Proof of 501(c)(3) Status (Attachment H)

Provide copies of letters from both the Internal Revenue Service and the California Franchise Tax Board, that confirms the agency's 501(c)(3) non-profit status. See Attachment H for sample letters.

Responses to this RFI must be emailed by January 13, 2023 to DOR to Grants@dor.ca.gov with the subject line: RFI 22-12-01 Response Package.

IX. REVIEW AND AWARD PROCESS

DOR CLF Program staff will review each RFI response submission to conduct a complete evaluation of the Respondent's ability to perform CLF Program activities. The CLF Program staff will determine how many grants will be executed.

DOR reserves the right to add providers on a continuous basis to ensure adequate quality of services amongst providers and quantity of providers to achieve statewide service coverage.

Program staff will work with each Respondent to ensure the completion of RFI response submission. Upon selection as a Provider, CLF Program staff will work with Providers to develop grant packages and provide all necessary documents for Providers to begin Program activities.

Comments or concerns regarding proposed grant awards must be emailed to DOR within 10 days of publication of Notice of Intent to Award to Grants@dor.ca.gov with the subject line: RFI 22-12-01 Response Package.

X. ATTACHMENT A: RESPONSE CHECKLIST

This checklist is to be used to ensure all required documents have been submitted as detailed in Section VIII. Response Submission Requirements Section

Organization:

Contact Person:

Direct Telephone:

Email Address:

Documents	Check here once completed
Attachment A: Response Checklist	
Attachment B: Cover Sheet	
Attachment C: Narrative Outline	
Attachment D: List of County or Counties to be Served	
Attachment E: Key Personnel	
Attachment F1: Transition Cost Proposal and Narrative	
Attachment F2: Diversion Cost Proposal and Narrative	
Attachment G: Proof of insurance coverage	
Attachment H: Proof of 501(c)(3) Status	

XI. ATTACHMENT B: COVER SHEET

1. Respondent (Organization):

Name _____
Address _____
City _____ County _____ ZIP Code _____
Tax ID Number _____

2. Project Director:

Name _____ Title _____
Telephone _____
E-mail _____

3. Administrator:

Name _____ Title _____
Telephone _____
E-mail _____

4. Contact person for response, if different than Project Director:

Name _____ Title _____
Telephone _____
E-mail _____

The respondent certifies that, to the best of their knowledge and belief, the information in this response is true and correct.

Name of Authorized Official

Print _____
Signature _____ Date _____
Telephone _____
E-mail _____

XII. ATTACHMENT C: NARRATIVE OUTLINE

Using the format as outlined below provide a narrative response as it relates to the entire organization. The response to item A. Respondent Organization and Experience and item B. Proposed Work Plan has a seven-page limit (8 ½" X 11" paper size) and must be single-sided, single-spaced, and 14-point Arial font.

A. Respondent Organization and Experience

Please provide detailed responses to the following:

1. Explain the organization's ability to implement the CLF Program, including experience working with individuals with disabilities and older adults in need of institutional transition and diversion services and how the organization's mission and core services align with and support the CLF Program.
2. Explain the organization's knowledge and experience providing person-centered institutional transition and diversion services to people with disabilities and/or older adults.
3. Provide details and examples of the organization's experience with outreach and communication with racially, ethnically, and socioeconomically diverse, and geographically unserved and underserved communities. Include experience serving people with different types of disabilities and people of different ages.
4. Describe the organization's history with coordination and collaboration with State and local organizations and agencies to provide services and supports that advance community living for people with disabilities and/or older adults in the geographic region identified.

B. Proposed Work Plan

The proposed project must be clearly presented with a detailed work plan that identifies the following elements:

1. Assessment of availability of existing institutional transition and diversion services and programs and LTSS that will support individuals to live safely in the community and are available in the identified service area. This may include but is not limited to the following organizations, services, and programs:
 - Aging and Disability Resource Connections (ADRCs)

- Area Agencies on Aging (AAA) services and programs (home delivered meals, congregate meals, information and assistance, transportation, home modifications, legal services, ombudsman, etc.)
 - Assistive Technology programs and durable medical equipment suppliers
 - Behavioral health programs
 - Blind and low vision programs, including Older Individuals who are Blind (OIB)
 - CalAIM Managed Care Supportive Services and Enhanced Care Management
 - Assisted Living Waiver program
 - Caregiver Resource Centers
 - California Community Transitions/Money Follows the Person
 - Deaf and hard of hearing programs
 - Emergency housing vouchers
 - Home and Community-Based Services (HCBS) Agencies
 - Home modification programs
 - Home Safe Program
 - Homeless coordinated entry systems
 - In-Home Supportive Services
 - Independent Living Centers
 - Medi-Cal and CalFresh eligibility
 - Multi-Purpose Senior Services Programs
 - Regional housing authorities
 - Traumatic Brain Injury programs
2. Outreach to people with disabilities, including older adults, who could benefit from this program and to institutional facilities including:
- Licensed skilled nursing facilities
 - Intermediate care facilities for individuals with developmental disabilities

- State hospitals for the mentally ill
 - Developmental centers
 - Rehabilitation hospitals
 - California Veterans Homes
 - Acute care hospitals
3. Coordination of services with other organizations and agencies that provide services and supports for institutional transition and diversion and for ongoing LTSS. Explain how the CLF Program will be implemented as part of an existing NWD model or methods for integration with other organizations and agencies to streamline and coordinate services. This should include existing partnerships on a NWD initiative or strategies to streamline access to services, coordinating or braiding funding sources, and avoid duplication of services for the CLF Program.

NWD systems empower individuals to make informed decisions, exercise control over their long-term care needs, and achieve their personal goals and preferences. A NWD system is where anyone can be seamlessly connected to the full range of community-based options available. Through a network of agencies, NWD expands access to services and supports, helping individuals and their caregivers navigate resources they need with a person-centered approach.

4. Serve populations equitably regardless of race, ethnicity, socioeconomic status, disability, age, sexual orientation, and gender identity. Include plans to serve, either directly or through coordination of services with other organizations, individuals with from communities of color who have dementia, Alzheimer's, and/or developmental and intellectual disabilities.
5. Provide individualized person-centered services that allow individuals to be engaged in the decision-making process about their options, preferences, values, and financial resources, including:
- a. Services in a variety of settings, such as the individual's home, community residence, institution, or other settings based on the individual's needs.
 - b. Services based on the person's goals and preferences and how a transition or diversion plan will be developed.

- c. Follow-up services post-transition or diversion to determine outcomes.
 - d. Ensure staff is trained to provide person-centered transition and diversion services. Training might include person-centered planning, institutional transition and diversion, options counseling, motivational interviewing, care transition intervention, or other trainings to develop staff skills. State if any training has already been provided.
6. Methods to conduct an individual's eligibility for the CLF Program, including:
- a. If the person is in an institution or is at-risk of institutionalization and would likely meet institutional level of care.
 - b. If the individual's income is 300% of the federal poverty level with medical or disability expenses deducted. Verify income eligibility and assess for medical or disability-related deductions.
 - c. How the CLF Program institutional transition and diversion services are not available elsewhere to the individual.
7. Methods for tracking and monitoring the outcomes of the CLF Program consumers, including:
- a. Estimated number of consumers to be transitioned or diverted from institutions through June 30, 2025.
 - b. How the organization tracks consumer services and outcomes, including infrastructure for databases, policies and procedures, and ability to collect and report activities specific to this grant.

XIII. ATTACHMENT D: LIST OF COUNTY OR COUNTIES TO BE SERVED

CLF Program services will be provided to the following counties:

1.
2.
3.
4.
5.
6.
7.
8
9.
10.
<ul style="list-style-type: none">• Add additional lines, if needed

XIV. ATTACHMENT E: KEY PERSONNEL

Provide resumes for key personnel who will provide CLF Program services during the grant period. If a position is vacant and will be filled to provide services under this grant, provide the job description or duty statement.

XV. ATTACHMENT F1: TRANSITION COST PROPOSAL AND NARRATIVE

This worksheet is to be used to establish the all-inclusive reimbursement rate for staff time and travel for transition services provided to an eligible individual. The all-inclusive reimbursement rate cannot exceed \$4,500 per individual served.

Cost Proposal:

<u>Program Expense</u>	<u>Cost</u>
Staff Wages (per staff member):	\$ _____
Travel Expenses:	\$ _____
All-inclusive Staff Wages per CLF Program Transition	\$ _____

Cost Proposal Narrative:

Providers may be reimbursed up to \$4,500 per consumer for staff time dedicated to performing transition program services. Using the cost table above, prepare a detailed cost proposal to establish the all-inclusive total covering staff wages and travel expenses for each transition.

Personnel: List specific personnel who will be performing the eligible transition program activities. Program activities include but are not limited to identifying individuals in need of institutional transition services, verifying the individual qualifies for the CLF Program, assisting consumers to transition into the community from institutional facilities, and activity reporting. If more than one staff member will be involved, include position titles and costs for each separately, and include the total cost on the cost table.

Travel: Include the cost of transportation (airfare, per diem, mileage/fuel costs, and/or rental car). Since this is an all-inclusive daily rate, the cost of travel will need to be averaged based on the need to travel anywhere in California. Travel costs cannot exceed the California Department of Human Resources (CalHR) designated rates for excluded employees. Visit the [CalHR Website](#) for more information.

Cost Proposal Example:

<u>Program Expense</u>	<u>Cost</u>
Staff Wages (per staff member):	\$4,410.00
1 CLF Program Service Coordinator @ 98 hours	
@ \$45.00 per hour	
Travel Expenses:	\$90.00
Average of 100 miles driven per consumer	
@ 62.5 cents per mile	
Average bridge toll cost of \$7.50 per institutional transition	
Average parking cost of \$20.00 per institutional transition	
All-inclusive reimbursement rate for staff wages and travel expenses per transition:	\$4,500.00

Cost Proposal Narrative Example:

Personnel

The Example Agency proposes to utilize one 100% FTE CLF Program Service Coordinator to fulfill the CLF Program activities. For each successful institutional transition, it is estimated that each CLF Program Service Coordinator will dedicate 98 hours to program services per consumer over one year.

Travel

The Example Agency estimates for each consumer transitioning, staff will drive 100 miles, pay one bridge toll, and pay one parking expense.

XVI. ATTACHMENT F2: DIVERSION COST PROPOSAL AND NARRATIVE

This worksheet is used to establish the all-inclusive reimbursement rate for diversion services provided to an eligible individual. The all-inclusive reimbursement rate cannot exceed \$2,500 per individual.

Cost Proposal:

<u>Program Expense</u>	<u>Cost</u>
Staff Wages (per staff member):	\$ _____
Travel Expenses:	\$ _____
All-inclusive Staff Wages per CLF Program Diversion	\$ _____

Cost Proposal Narrative:

Providers may be reimbursed up to \$2,500 per consumer for staff time dedicated to performing diversion program services. Using the cost table above, prepare a detailed cost display to establish the all-inclusive total covering staff wages and travel expenses per diversion.

Personnel: List specific personnel who will be performing the eligible transition program activities. Program activities include but are not limited to identifying individuals in need of diversion services, verifying the individual qualifies for the CLF Program, providing consumers at risk of institutionalization access to services and support, and activity reporting. If more than one staff member will be involved, include names and costs for each separately, and include the total cost on the cost table.

Travel: Include the cost of transportation (airfare, per diem, mileage/fuel costs, and/or rental car). Since this is an all-inclusive daily rate, the cost of travel will need to be averaged based on the need to travel anywhere in California. Travel costs cannot exceed the California Department of Human Resources (CalHR) designated rates for excluded employees. Visit the [CalHR Website](#) for more information.

Cost Proposal Example:

<u>Program Expense</u>	<u>Cost</u>
Staff Wages (per staff member):	\$2,430.00
1 CLF Program Service Coordinator @ 54hours @ \$45.00 per hour	
Travel Expenses:	\$70.00
Average of 60 miles driven per consumer @ 62.5 cents per mile	
Average bridge toll cost of \$9.50 per or diversion	
Average parking cost of \$23.00 per diversion	
All-inclusive reimbursement rate for staff wages and travel expenses per diversion:	\$2,500.00

Cost Proposal Narrative Example:

Personnel:


The Example Agency proposes to utilize one 50% FTE CLF Program Service Coordinator to fulfill the CLF Program activities. For each successful institutional diversion, it is estimated each CLF Program Service Coordinator will dedicate 54 hours to program services per eligible consumer over one-year.

Travel:

The Example Agency estimates for each consumer diversion, staff will drive 60 miles, pay one bridge toll, and pay one parking expense.


XVII. ATTACHMENT G: PROOF OF INSURANCE

Provide proof of insurance including General Liability, Worker's Compensation, and if applicable, Professional Liability. An example is below.

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 02/02/2021		
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>						
PRODUCER All-Cal Insurance Agency 505 Vernon Street Roseville CA 95678		CONTACT NAME: DiAnna Martin PHONE (A/C, No, Ext): (916) 784-9070 E-MAIL ADDRESS: dianna@all-calinsurance.com FAX (A/C, No): (916) 784-0158		INSURER(S) AFFORDING COVERAGE INSURER A: Nonprofits' Insurance Alliance of California NAIC # 011845 INSURER B: State Compensation Insurance Fund 35076 INSURER C: INSURER D: INSURER E: INSURER F:		
INSURED Entity ABC 123 Alphabet Street Sacramento CA 95814						
COVERAGES		CERTIFICATE NUMBER: CL2012409825		REVISION NUMBER:		
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Improper Sexual Conduct \$ 250,000 / 250,000 GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input checked="" type="checkbox"/> OTHER: Liquor Liability - Included		2020-05135NPO	06/20/2020	06/20/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 20,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 Professional Liability \$ 3,000,000 COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Comp & Coll Deductible \$ 500
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		2020-05135NPO	06/20/2020	06/20/2021	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 DED \$ RETENTION \$ 10,000
A	<input checked="" type="checkbox"/> UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000		2020-05135UMB	06/20/2020	06/20/2021	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 DED \$ RETENTION \$ 10,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	1894154-20	12/31/2020	12/31/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 Limit \$ 50,000 Limit \$ 50,000 Deductible \$ 500
A	Employee Dishonesty Forgery & Alteration		2020-05135PROP	06/20/2020	06/20/2021	Limit \$ 50,000 Limit \$ 50,000 Deductible \$ 500
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) THIS CERTIFICATE IS PROVIDED ONLY AS EVIDENCE OF COVERAGE.						
CERTIFICATE HOLDER			CANCELLATION			
INFORMATION ONLY			SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 			

XVIII. ATTACHMENT H: PROOF OF 501(C)(3) STATUS

Letters from the Internal Revenue Service and the California Franchise Tax Board that confirm the agency's 501(c)(3) non-profit status. Examples are below.

 **IRS** Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248667581
July 23, 2009 LTR 4168C EO
68-0085639 000000 00

00014381
BODC: TE



116390

[REDACTED]
RD STE A
CA 95959-3227

Employer Identification Number: [REDACTED]
Person to Contact: [REDACTED]
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of July 14, 2009, regarding your tax-exempt status.

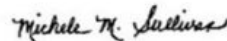
Our records indicate that a determination letter was issued in June 1986, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I



STATE OF CALIFORNIA
FRANCHISE TAX BOARD
PO BOX 942857
SACRAMENTO CA 94257-0540

Entity Status Letter

Date: 1/30/2021

ESL ID: 3441167078

Why You Received This Letter

According to our records, the following entity information is true and accurate as of the date of this letter.

Entity ID:

Entity Name:

- ☒ 1. The entity is in good standing with the Franchise Tax Board.
- ☐ 2. The entity is **not** in good standing with the Franchise Tax Board.
- ☒ 3. The entity is currently exempt from tax under Revenue and Taxation Code (R&TC) Section 23701 d.
- ☐ 4. We do not have current information about the entity.
- ☐ 5. The entity was administratively dissolved/cancelled on _____ through the Franchise Tax Board Administrative Dissolution process.

Important Information

- This information does not necessarily reflect the entity's current legal or administrative status with any other agency of the state of California or other governmental agency or body.
- If the entity's powers, rights, and privileges were suspended or forfeited at any time in the past, or if the entity did business in California at a time when it was not qualified or not registered to do business in California, this information does not reflect the status or voidability of contracts made by the entity in California during the period the entity was suspended or forfeited (R&TC Sections 23304.1, 23304.5, 23305a, 23305.1).
- The entity certificate of revivor may have a time limitation or may limit the functions the revived entity can perform, or both (R&TC Section 23305b).

Connect With Us

Web: ftb.ca.gov
Phone: 800.852.5711 from 7 a.m. to 5 p.m. weekdays, except state holidays
916.845.6500 from outside the United States
TTY/TDD: 800.822.6268 for persons with hearing or speech impairments