

The HICAP coordinates General Education & Outreach, and Latino Education & Outreach (bilingual English-Spanish), through Supervising Coordinators for each department overseeing an Education and Outreach Specialist. This method ensures that as demand for HICAP presentations and event participation increases, the HICAP will be well positioned to accommodate community needs. Furthermore, as more HICAP Volunteers build a stronger Medicare knowledge base, and begin meeting registration requirements to become HICAP General Educators. Selection of volunteers to assist in Public and Media events, and work alongside our staff Education Departments to reach more beneficiaries.

Public education and information presentations offered by the HICAP, include topics ranging from, but are not limited to, Roadmap to Medicare, MIPPA and the HICAP Benefits Enrollment Center, the California Coordinated Care Initiative (CCI) / Cal-MediConnect, Medicare and other health insurance products, long term care insurance, and etc., while adapting curriculums to best meet the needs of the target audience.

In addition, the HICAP Program Manager acts as the lead Medicare trainer, where they attend bi-annual California Department of Aging HICAP Conferences. This allows the Program Manager to be fully updated with trending topics affecting Medicare beneficiaries, and networks with other programs to incorporate best practices to improve and increase HICAP community education.

The HICAP partners with other aligned Community Based Organizations and government agencies, to raise awareness of available HICAP services, educate professionals serving Medicare beneficiaries, and addressing trends affecting Riverside County Medicare beneficiaries as a population, such as denials of service or balanced billing.

STAFFING CAPABILITY AND PATTERN

- A.** Describe the staffing pattern that is proposed for HICAP services, and include job titles where applicable, and supervisory lines of authority.

HICAP of Riverside County utilizes a combination of paid-staff HICAP Counselors and volunteer HICAP Counselor support to deliver HICAP services to the Riverside County community. The HICAP staffing pattern relies on teams responsible for defined HICAP service functions.

COAOC HICAP Program Director, supervises HICAP Program Managers serving Orange, Riverside and San Bernardino Counties. Supervises HICAP Medicare Appeals Advocate.

HICAP Program Manager, oversees program operations and supervises HICAP Operations Coordinator, Volunteer Coordinator, Education and Outreach Coordinator, and Latino Education and Outreach Coordinator.

HICAP Operations Coordinator, supervises HICAP Call Center Specialists.

HICAP Call Center Specialist, staffed HICAP Counselors providing continuous HICAP Call Center Coverage and case management. Includes, English-Spanish Bilingual HICAP Call Center Specialist.

HICAP Volunteer Coordinator, supervises Volunteers. Trains and recruits new Volunteer Counselors. Supervises Volunteer Admin & Training Specialist.

HICAP Volunteer Admin. & Training Specialist, administrative lead for Volunteer department. Facilitates enhanced training for volunteer counselors.

HICAP Education and Outreach Coordinator, supervises and coordinates with Education and Outreach Specialist. Conducts presentations and participates in community events.

HICAP Education and Outreach Specialist, conducts presentations and participates in community events.

HICAP Latino Education and Outreach Coordinator, supervises and coordinates with Latino Education and Outreach Specialist. Conducts Hispanic community targeted presentations and community events.

HICAP Latino Education and Outreach Specialist, Conducts Hispanic community targeted presentations and community events.

HICAP Benefits Enrollment Center and Medicare Benefits Specialist, supervises and coordinates with HICAP Benefits Enrollment Center and Medicare Benefits Counselor. Responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Benefits Enrollment Center and Medicare Benefits Counselor, responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Regional Coordinator, responsible for Inyo and Mono County HICAP Counseling and Community presentations/events.

B. Describe the project management, technical staff, and the effective use of a broad cadre of volunteer HICAP Counselors. Describe technical staff functions and general duties, including those responsibilities that will be assigned to volunteer HICAP Counselors.

HICAP of Riverside County utilizes a combination of technical staff and volunteer HICAP Counselors to meet the demands and individual project goals.

The HICAP Program Director and Program Manager, are responsible for the strategic planning and goals so as to meet and/or exceed program deliverables.

The ongoing project to provide Counseling services and outreach to the Riverside County Community, utilizes the expertise of the technical staff departments: Call Center, Volunteers, Education and Outreach, and Latino Education and Outreach, to ensure a multifaceted approach to increasing awareness of HICAP services, educating the public, and providing individual counseling services.

To increase staff specialization to meet overall program deliverables, each HICAP department comprises a supervising coordinator and subordinate technical specialist. Among each of the Coordinator positions, a new addition in the contract period is the HICAP Operations Coordinator. This position directly supervises a team of HICAP Call Center Staff Specialists, to ensure a high-quality counseling experience for the Riverside / Inyo & Mono County Medicare beneficiaries. In addition, the HICAP Operations Coordinator, also oversees the BEC Staff positions, which focus on the MIPPA project delivery.

Volunteerism is a key function of successfully meeting program deliverables, therefore Volunteer recruitment and training is an ongoing and continuous effort at all times.

State registered Volunteer HICAP Counselors provide in-person counseling at 26 partnering sites throughout Riverside County. In addition, registered Volunteer HICAP Counselors participate in Education and Outreach, Long Term Care Insurance Counseling, MIPPA outreach, AEP Enrollment Clinic Counseling, and other State / Federal projects related HICAP as they are implemented.

To facilitate the growth of the program, funds in the contract period will be used to increase the exposure of the program through a combination of staffing and related operational costs detailed in the provided budget.

COORDINATION WITH NETWORK OF AGING SERVICES

- A. Describe the methods that will be employed to coordinate with other aging/senior network services, community based services, and other HICAP services.

HICAP of Riverside County acts a clearinghouse of resources when assisting HICAP clients, and works to connect the client with the appropriate aging/senior network services or community based services as necessary.

When a Riverside County client seeks to utilize available HICAP services, HICAP of Riverside County works to provide the needed counseling services by scheduling the client to meet with a Counselor at one of the 26 in-person counseling sites throughout the County. Or, at the discretion of the client, provide counseling services over the phone through our HICAP Call Center.

The HICAP Education and Outreach team coordinate with aligned community partners to increase the awareness of HICAP services in the community.

As outreach efforts are increased in the contract period, standard coordination practices will continue to raise awareness of HICAP services, and to link HICAP clients to available programs through the Riverside County ADRC, and other Community Based Organizations.

B. Describe the proposer agency's experience in cooperative relationships with community based services. Describe experience, if any, working with regulatory agencies at the state and federal levels.

HICAP of Riverside County works closely and cooperatively with aligned community based organizations / services in Riverside County as to best serve the County's HICAP clients, seniors, persons with disabilities, and their caregivers.

Due to the nature of HICAP scope of work, collaboration with State and Federal Regulatory Agencies at times may be necessary.

HICAP of Riverside County works with California Department of Aging on an ongoing basis so to ensure an efficient running program. Participation in workgroups and stakeholder groups, are the extent to work with other regulatory agencies. For example, in participation in collaborates focused on trends affecting beneficiaries through the California Coordinated Care Initiative / Financial Alignment. Other examples of where the HICAP will work directly with regulatory agencies, is when assisting a client with the Medicare appeals process up to the Administrative Law Judge level, or at times directly with CMS to resolve specific technical issue(s) affecting a beneficiary.

C. Describe the coordination between the counseling and legal services, as required by law. Indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP of Riverside County utilizes its network of staff and volunteer HICAP Counselors to provide preliminary Medicare counseling services to Riverside County Medicare beneficiaries, under the review of the HICAP Program Manager.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assess the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

The Medicare Appeals Advocate is the primary managing Counselor concerning the Medicare Appeals process. When encountering a client that needs assistance with a Medicare denied service the Staff Appeals Advocate, will either work with the Primary Counselor to assist clients with Medicare appeals, or assume the case entirely and work directly with the client to pursue resolution. The Appeals Advocates assists in all Medicare denied services, up to and including the Administrative Law Judge level.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to Riverside County Legal Services.

INYO/MONO AREA AGENCY PROGRAM SUPPORT

A. Describe how the agency will assist the Inyo/Mono Area Agency with program and technical support as described in Section L., Office on Aging Requirements

COAOC provides HICAP services in Inyo and Mono Counties, as HICAP of Inyo and Mono Counties.

Under the supervision of the HICAP Program Manager and the HICAP Program Director, the Inyo and Mono County HICAP Regional Coordinator provides HICAP services through one-on-one counseling, and conducts interactive presentations, booth/exhibits, and other Public and Media events.

In addition, the HICAP Call Center provides additional coverage to Inyo and Mono county residents during periods of high demand such as the Medicare Annual Election period, and throughout the year.

The HICAP Program Manager and the Regional Coordinator, will continue to provide program technical support to the Inyo/Mono Area Agency.

B. Describe the coordination between the counseling and legal services, as required by law, indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP Counseling and legal services are coordinated through a combination of staff and volunteer HICAP Counselors in the Inyo and Mono County service area.

In-person counseling services are provided by the HICAP Regional Coordinator in the Inyo and Mono Counties, with volunteer HICAP Counselor support to provide increased counseling capacity. In addition, the HICAP Call Center provides added counseling capacity for the communities' Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assesses the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to the county Legal Services.

OUTREACH AND PUBLICITY

A. Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Inyo and Mono Counties provides community education events throughout PSA 16, including interactive presentations, operating booth/exhibits at health fairs and events, enrollment events, and other Public and Media events.

COAOC / HICAP of Inyo and Mono Counties will incorporate ad placement in key Inyo and Mono county newspapers to increase awareness of HICAP services.

Through a combination of the planned Media campaign strategy and ongoing outreach and education activities, HICAP will continue to provide increased services throughout PSA 16.

ATTACHMENT A

SCOPE OF WORK FY 2015 – 2016 July 1, 2015 – March 31, 2016 (Nine Months)

COUNCIL ON AGING ORANGE COUNTY HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM HICAP REIMBURSEMENT (Ins. Fund)

PROGRAM DESCRIPTION

- A. Describe the proposer agency's interest in providing the HICAP services, and the overall concept that the agency intends to use in the provision of HICAP services. Explain the qualifications and accomplishments that would indicate the proposer's ability to deliver the services by this RFP. Document any previous relevant training and experience applicable to HICAP services.

The Council on Aging - Orange County / HICAP of Riverside County currently provides Health Insurance Counseling & Advocacy Program services to Medicare beneficiaries and persons imminent to the Medicare program in Riverside, Inyo and Mono Counties. COAOC has operated as the contractor since October 2012, and currently operates through a combination of Staff and Volunteer HICAP Counselors that provide one-on-one counseling services through a combination of 26 in-person counseling sites located throughout the Riverside County service area, the HICAP Office/Call Center located in Rancho Cucamonga. In FY 2013/2014, HICAP of Riverside County assisted 2,581 Riverside County clients, 127% of the State benchmark, achieving 4 out of 7 exemplary level attainments in HICAP performance measurements.

As of June 22, 2015 for FY 2014/2015, COAOC/HICAP of Riverside County is expected to exceed the performance measure of served clients, 2,565 Medicare beneficiaries, by approximately 9 percent. This interprets as COAOC / HICAP of Riverside County serving approximately 2,800 client in FY 2014/2015.

The HICAP Program Manager regularly attends the California Department of Aging biannual HICAP Conference, so as to increase program knowledge on select Medicare topics, and to incorporate into monthly in-service trainings and round tables to ensure HICAP Counselors are knowledgeable on topics affecting their communities.

In addition, in the proposed contract period, the HICAP Program Manager will attend the CMS Train the Trainer event held in Garden Grove, CA in August 2015. This will further increase the technical experience of the program, to better serve the Riverside County community.

HICAP participates in monthly Medicare technical assistance calls hosted by the California Health Advocates. The technical assistance calls allow for the Program Manager to present issues facing the Riverside County community in terms of their Medicare benefits, and allows for a cross-county collaborative approach in terms of complex case resolution. The HICAP participates in additional trainings conducted by the

National Council on Aging, Justice in Aging, and the California Health Advocates; on timely topics ranging from Covered CA for Medicare beneficiaries, the California Coordinated Care Initiative / Cal MediConnect Basic and Advanced Trainings, MIPPA topics, and etc.

HICAP of Riverside County / HICAP of Inyo and Mono Counties intends to further expand HICAP services in the Riverside County and Inyo & Mono County communities through a multi-pronged approach so to increase the HICAP Volunteer base, increase Education and Outreach efforts, and to increase services to the community. This will be accomplished by expanding the HICAP staffing levels, and implementation of an organizational structure that departmentalizes key program responsibilities: Volunteers, General Education & Outreach, Latino Education & Outreach, and Call Center Operations.

- B.** Describe the proposed strategies and methods that will be used to provide the HICAP services to the broadest possible targeted population. Include who will be served, how, where, and when the services allowed under HICAP will operate. Describe the different levels of services allowable under HICAP rules and demonstrate an understanding of the requirements, responsibilities, and technical training need for operating a HICAP. Describe how these services would be managed in a cost efficient and effective manner by the proposer agency. Include a statement of how the program will satisfy the service requirements outlined in the RFP and the agency's understanding of HICAP specifications.

HICAP of Riverside County / HICAP of Inyo & Mono Counties will continue and build on a multi-faceted approach in increasing the capacity of a trained HICAP Volunteer base, and increasing education and outreach events in the community; with the purpose to provide high level Medicare Counseling services to our communities and meet / exceed program performance measurements.

Over the course of the previous fiscal year, COAOC reviewed the program organizational structure and determined that a reorganization was necessary to best maximize program resources and increase services at the community level. To accomplish this, COAOC has departmentalized key program responsibilities, with the Program Director and Manager overseeing program planning and project management. The key departments created consist of: Volunteer Department, General Education & Outreach, Latino Education & Outreach, and Call Center Operations. Supervising Coordinators in each department, lead project delivery with supporting Specialist positions.

So to meet the demand of HICAP services across our service areas, HICAP will work to increase the volunteer capacity at individual one-on-one counseling sites throughout the County. COAOC recognizes that the increasing demand for HICAP services must be answered through a strong HICAP Volunteer base, so to match the overall growth of the program, the County's Medicare population and to successfully deliver targeted projects, such as the Medicare Part D Annual Enrollment Clinics and the continuing MIPPA project. To increase the HICAP volunteer base in the contract period, the HICAP will work towards three goals: community relationship building, building the volunteer base, and improving HICAP volunteer counselor development trainings. Each individual goal will be

met with deliverables aimed at improving the volunteer experience and in turn, increase the overall program capacity to serve more clients. In FY 2015/2016, the HICAP will be responsible for providing services for a minimum of 2,727 Riverside County Medicare beneficiaries and persons imminent to the Medicare program. Within the contract period, Medicare Annual Enrollment, which is the height of demand for HICAP services, will take place from October 15th thru December 7th. Medicare Annual Enrollment Clinics will be expanded during this time, to increase the opportunities available for Medicare beneficiaries to meet with a HICAP Counselor, in-person, one-on-one counseling for Medicare prescription drug comparisons. In the 2014 Medicare AEP, 5 enrollment clinics were held throughout Riverside County. In 2015, a minimum of 8 AEP Enrollment Clinics will be held throughout Riverside County, a 60% increase. This counseling strategy, along with the counseling support of the expanded HICAP Call Center, the program will be well positioned in meeting all annual deliverables.

The HICAP Call Center provides immediate counseling services, assistance, and in-person appointment scheduling to the County's Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers. Where counseling services include, general Medicare topics, New to Medicare counseling, the Dual Eligible Demonstration project, MIPPA counseling and application assistance, Medicare options counseling, MA and Part D comparisons, Medicare billing assistance, Medicare Appeals assistance, Long Term Care Insurance Counseling, and etc.

So to ensure HICAP Counselors are appropriately trained on new topics affecting the Medicare program and our county's Medicare beneficiaries, the HICAP will continue to offer HICAP Roundtable trainings for complex case review, and monthly HICAP In-Service Meetings spotlighting Medicare updates and topical presentations.

To concentrate the efforts towards Volunteer recruitment, training and development; the HICAP will rely on a staff department team consisting of a supervising Volunteer Coordinator, a Volunteer Specialist responsible for recruitment and training in the Riverside County service area, and a Volunteer Admin. & Training Specialist that will act as a lead for administrative duties and an enhanced trainer to facilitate new and continuing education. The Volunteer Specialist position and Volunteer Admin & Training Specialist, are new positions in the HICAP organizational structure, and demonstrate the program's ability to provide new solutions as to meet increasing demand in a cost-efficient and effective manner.

- C. Describe any experience in providing public education, training, or public informational presentations. Demonstrate the ability to learn about and perform in areas of government programs, long-term care planning, and consumer protection issues.

HICAP of Riverside County utilizes a staff education and outreach team, composing of General Education and Outreach, and specialized Latino Education and Outreach. All staff members undergo continuous update trainings in order to maintain HICAP registration, and to provide up-to-date information and topics to the community. As of May 2015, the HICAP will have completed 205 public and media events, comprising of interactive presentations, booth/exhibits, and enrollment events. The HICAP Education and Outreach departments, are the primary method in our education and community awareness strategy.

The HICAP coordinates General Education & Outreach, and Latino Education & Outreach (bilingual English-Spanish), through Supervising Coordinators for each department overseeing an Education and Outreach Specialist. This method ensures that as demand for HICAP presentations and event participation increases, the HICAP will be well positioned to accommodate community needs. Furthermore, as more HICAP Volunteers build a stronger Medicare knowledge base, and begin meeting registration requirements to become HICAP General Educators. Selection of volunteers to assist in Public and Media events, and work alongside our staff Education Departments to reach more beneficiaries.

Public education and information presentations offered by the HICAP, include topics ranging from, but are not limited to, Roadmap to Medicare, MIPPA and the HICAP Benefits Enrollment Center, the California Coordinated Care Initiative (CCI) / Cal-MediConnect, Medicare and other health insurance products, long term care insurance, and etc., while adapting curriculums to best meet the needs of the target audience.

In addition, the HICAP Program Manager acts as the lead Medicare trainer, where they attend bi-annual California Department of Aging HICAP Conferences. This allows the Program Manager to be fully updated with trending topics affecting Medicare beneficiaries, and networks with other programs to incorporate best practices to improve and increase HICAP community education.

The HICAP partners with other aligned Community Based Organizations and government agencies, to raise awareness of available HICAP services, educate professionals serving Medicare beneficiaries, and addressing trends affecting Riverside County Medicare beneficiaries as a population, such as denials of service or balanced billing.

STAFFING CAPABILITY AND PATTERN

- A.** Describe the staffing pattern that is proposed for HICAP services, and include job titles where applicable, and supervisory lines of authority.

HICAP of Riverside County utilizes a combination of paid-staff HICAP Counselors and volunteer HICAP Counselor support to deliver HICAP services to the Riverside County community. The HICAP staffing pattern relies on teams responsible for defined HICAP service functions.

COAOC HICAP Program Director, supervises HICAP Program Managers serving Orange, Riverside and San Bernardino Counties. Supervises HICAP Medicare Appeals Advocate.

HICAP Program Manager, oversees program operations and supervises HICAP Operations Coordinator, Volunteer Coordinator, Education and Outreach Coordinator, and Latino Education and Outreach Coordinator.

HICAP Operations Coordinator, supervises HICAP Call Center Specialists.

HICAP Call Center Specialist, staffed HICAP Counselors providing continuous HICAP Call Center Coverage and case management. Includes, English-Spanish Bilingual HICAP Call Center Specialist.

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HICAP Volunteer Admin. & Training Specialist, administrative lead for Volunteer department. Facilitates enhanced training for volunteer counselors.

HICAP Education and Outreach Coordinator, supervises and coordinates with Education and Outreach Specialist. Conducts presentations and participates in community events.

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HICAP Benefits Enrollment Center and Medicare Benefits Specialist, supervises and coordinates with HICAP Benefits Enrollment Center and Medicare Benefits Counselor. Responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Benefits Enrollment Center and Medicare Benefits Counselor, responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Regional Coordinator, responsible for Inyo and Mono County HICAP Counseling and Community presentations/events.

B. Describe the project management, technical staff, and the effective use of a broad cadre of volunteer HICAP Counselors. Describe technical staff functions and general duties, including those responsibilities that will be assigned to volunteer HICAP Counselors.

HICAP of Riverside County utilizes a combination of technical staff and volunteer HICAP Counselors to meet the demands and individual project goals.

The HICAP Program Director and Program Manager, are responsible for the strategic planning and goals so as to meet and/or exceed program deliverables.

The ongoing project to provide Counseling services and outreach to the Riverside County Community, utilizes the expertise of the technical staff departments: Call Center, Volunteers, Education and Outreach, and Latino Education and Outreach, to ensure a multifaceted approach to increasing awareness of HICAP services, educating the public, and providing individual counseling services.

To increase staff specialization to meet overall program deliverables, each HICAP department comprises a supervising coordinator and subordinate technical specialist. Among each of the Coordinator positions, a new addition in the contract period is the HICAP Operations Coordinator. This position directly supervises a team of HICAP Call Center Staff Specialists, to ensure a high-quality counseling experience for the Riverside / Inyo & Mono County Medicare beneficiaries. In addition, the HICAP Operations Coordinator, also oversees the BEC Staff positions, which focus on the MIPPA project delivery.

Volunteerism is a key function of successfully meeting program deliverables, therefore Volunteer recruitment and training is an ongoing and continuous effort at all times.

State registered Volunteer HICAP Counselors provide in-person counseling at 26 partnering sites throughout Riverside County. In addition, registered Volunteer HICAP Counselors participate in Education and Outreach, Long Term Care Insurance Counseling, MIPPA outreach, AEP Enrollment Clinic Counseling, and other State / Federal projects related HICAP as they are implemented.

To facilitate the growth of the program, funds in the contract period will be used to increase the exposure of the program through a combination of staffing and related operational costs detailed in the provided budget.

COORDINATION WITH NETWORK OF AGING SERVICES

- A. Describe the methods that will be employed to coordinate with other aging/senior network services, community based services, and other HICAP services.

HICAP of Riverside County acts a clearinghouse of resources when assisting HICAP clients, and works to connect the client with the appropriate aging/senior network services or community based services as necessary.

When a Riverside County client seeks to utilize available HICAP services, HICAP of Riverside County works to provide the needed counseling services by scheduling the client to meet with a Counselor at one of the 26 in-person counseling sites throughout the County. Or, at the discretion of the client, provide counseling services over the phone through our HICAP Call Center.

The HICAP Education and Outreach team coordinate with aligned community partners to increase the awareness of HICAP services in the community.

As outreach efforts are increased in the contract period, standard coordination practices will continue to raise awareness of HICAP services, and to link HICAP clients to available programs through the Riverside County ADRC, and other Community Based Organizations.

- B. Describe the proposer agency's experience in cooperative relationships with community based services. Describe experience, if any, working with regulatory agencies at the state and federal levels.

HICAP of Riverside County works closely and cooperatively with aligned community based organizations / services in Riverside County as to best serve the County's HICAP clients, seniors, persons with disabilities, and their caregivers.

Due to the nature of HICAP scope of work, collaboration with State and Federal Regulatory Agencies at times may be necessary.

HICAP of Riverside County works with California Department of Aging on an ongoing basis so to ensure an efficient running program. Participation in workgroups and stakeholder groups, are the extent to work with other regulatory agencies. For example, in participation in collaborates focused on trends affecting beneficiaries through the California Coordinated Care Initiative / Financial Alignment. Other examples of where the HICAP will work directly with regulatory agencies, is when assisting a client with the Medicare appeals process up to the Administrative Law Judge level, or at times directly with CMS to resolve specific technical issue(s) affecting a beneficiary.

- C. Describe the coordination between the counseling and legal services, as required by law. Indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP of Riverside County utilizes its network of staff and volunteer HICAP Counselors to provide preliminary Medicare counseling services to Riverside County Medicare beneficiaries, under the review of the HICAP Program Manager.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assess the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

The Medicare Appeals Advocate is the primary managing Counselor concerning the Medicare Appeals process. When encountering a client that needs assistance with a Medicare denied service the Staff Appeals Advocate, will either work with the Primary Counselor to assist clients with Medicare appeals, or assume the case entirely and work directly with the client to pursue resolution. The Appeals Advocates assists in all Medicare denied services, up to and including the Administrative Law Judge level.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to Riverside County Legal Services.

COAOC is currently pursuing to establish an MOU with Inland County Legal Services.

OUTREACH AND PUBLICITY

- A. Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Riverside County will continue and expand currently implemented strategies for education and outreach, and Latino Education and Outreach through the contract period. The HICAP will meet performance measurements related to Outreach and Publicity, through a combination of Staff and Volunteer HICAP Counselors. HICAP General Educators will provide interactive presentations, booth/exhibits at partnering pharmacies and health / senior fairs, stakeholder groups / collaborates, and other community events.

In addition to a continuation of current Education and Outreach strategies, HICAP will expand its HICAP - Benefits Enrollment Center to provide increased MIPPA services to the Riverside County community. This will translate into additional topical presentations aimed at Part D enrollment assistance, Medicare Preventive Benefits, and Part D Limited Income Subsidy / Medicare Savings Program application assistance.

In the contract period, the Medicare Annual Election Period will be a primary topic concerning Medicare beneficiaries. To address this demand, the HICAP Education and Outreach departments will provide specialized topical presentations on 2016 Medicare changes. To support and build awareness of HICAP Medicare Part D Annual Enrollment Clinics, COAOC / HICAP will run a series of newspaper advertisement highlight clinic availability. Specialized Medicare Annual Enrollment Clinic fliers, will be distributed at health fairs and at partnering Senior / Community Centers.

- B. Describe how the agency would conduct market research, how an eligible person would find out about the HICAP services, and what methods you would use to bring them into the system.

HICAP of Riverside County, incorporates market research strategy into the HICAP client intake process. Prior to delivering counseling services, all HICAP Counselors obtain a set of data from their client to be uploaded into the California Department of Aging's Statewide HICAP Annual Reporting Program (SHARP) database.

Along with information needed to complete the client profile, HICAP Counselors ask how their client had learned about the program.

To accompany this question, HICAP of Riverside County has trained HICAP Counselors how to document this answer, and has expanded the reporting parameters to better identify the effectiveness of individual media campaigns.

This methodology will be employed in the contract period, accompanying any planned campaign strategies.

INYO/MONO AREA AGENCY PROGRAM SUPPORT

- A. Describe how the agency will assist the Inyo/Mono Area Agency with program and technical support as described in Section L., Office on Aging Requirements

COAOC provides HICAP services in Inyo and Mono Counties, as HICAP of Inyo and Mono Counties.

Under the supervision of the HICAP Program Manager and the HICAP Program Director, the Inyo and Mono County HICAP Regional Coordinator provides HICAP services through one-on-one counseling, and conducts interactive presentations, booth/exhibits, and other Public and Media events.

In addition, the HICAP Call Center provides additional coverage to Inyo and Mono county residents during periods of high demand such as the Medicare Annual Election period, and throughout the year.

The HICAP Program Manager and the Regional Coordinator, will continue to provide program technical support to the Inyo/Mono Area Agency.

- B.** Describe the coordination between the counseling and legal services, as required by law, indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP Counseling and legal services are coordinated through a combination of staff and volunteer HICAP Counselors in the Inyo and Mono County service area.

In-person counseling services are provided by the HICAP Regional Coordinator in the Inyo and Mono Counties, with volunteer HICAP Counselor support to provide increased counseling capacity. In addition, the HICAP Call Center provides added counseling capacity for the communities' Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assesses the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to the county Legal Services.

OUTREACH AND PUBLICITY

- A.** Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Inyo and Mono Counties provides community education events throughout PSA 16, including interactive presentations, operating booth/exhibits at health fairs and events, enrollment events, and other Public and Media events.

COAOC / HICAP of Inyo and Mono Counties will incorporate ad placement in key Inyo and Mono county newspapers to increase awareness of HICAP services.

Through a combination of the planned Media campaign strategy and ongoing outreach and education activities, HICAP will continue to provide increased services throughout PSA 16.

ATTACHMENT A

SCOPE OF WORK FY 2015 – 2016 April 1, 2016 – June 30, 2016 (Three Months)

COUNCIL ON AGING ORANGE COUNTY HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (Federal Base SHIP Funds)

PROGRAM DESCRIPTION

- A. Describe the proposer agency's interest in providing the HICAP services, and the overall concept that the agency intends to use in the provision of HICAP services. Explain the qualifications and accomplishments that would indicate the proposer's ability to deliver the services by this RFP. Document any previous relevant training and experience applicable to HICAP services.

The Council on Aging - Orange County / HICAP of Riverside County currently provides Health Insurance Counseling & Advocacy Program services to Medicare beneficiaries and persons imminent to the Medicare program in Riverside, Inyo and Mono Counties. COAOC has operated as the contractor since October 2012, and currently operates through a combination of Staff and Volunteer HICAP Counselors that provide one-on-one counseling services through a combination of 26 in-person counseling sites located throughout the Riverside County service area, the HICAP Office/Call Center located in Rancho Cucamonga. In FY 2013/2014, HICAP of Riverside County assisted 2,581 Riverside County clients, 127% of the State benchmark, achieving 4 out of 7 exemplary level attainments in HICAP performance measurements.

As of June 22, 2015 for FY 2014/2015, COAOC/HICAP of Riverside County is expected to exceed the performance measure of served clients, 2,565 Medicare beneficiaries, by approximately 9 percent. This interprets as COAOC / HICAP of Riverside County serving approximately 2,800 client in FY 2014/2015.

The HICAP Program Manager regularly attends the California Department of Aging biannual HICAP Conference, so as to increase program knowledge on select Medicare topics, and to incorporate into monthly in-service trainings and round tables to ensure HICAP Counselors are knowledgeable on topics affecting their communities.

HICAP participates in monthly Medicare technical assistance calls hosted by the California Health Advocates. The technical assistance calls allow for the Program Manager to present issues facing the Riverside County community in terms of their Medicare benefits, and allows for a cross-county collaborative approach in terms of complex case resolution. The HICAP participates in additional trainings conducted by the National Council on Aging, Justice in Aging, and the California Health Advocates; on timely topics ranging from Covered CA for Medicare beneficiaries, the California Coordinated Care Initiative / Cal MediConnect Basic and Advanced Trainings, MIPPA topics, and etc.

HICAP of Riverside County / HICAP of Inyo and Mono Counties intends to further expand HICAP services in the Riverside County and Inyo & Mono County communities through a multi-pronged approach so to increase the HICAP Volunteer base, increase Education and Outreach efforts, and to increase services to the community. This will be accomplished by expanding the HICAP staffing levels, and implementation of an organizational structure that departmentalizes key program responsibilities: Volunteers, General Education & Outreach, Latino Education & Outreach, and Call Center Operations.

- B.** Describe the proposed strategies and methods that will be used to provide the HICAP services to the broadest possible targeted population. Include who will be served, how, where, and when the services allowed under HICAP will operate. Describe the different levels of services allowable under HICAP rules and demonstrate an understanding of the requirements, responsibilities, and technical training need for operating a HICAP. Describe how these services would be managed in a cost efficient and effective manner by the proposer agency. Include a statement of how the program will satisfy the service requirements outlined in the RFP and the agency's understanding of HICAP specifications.

HICAP of Riverside County / HICAP of Inyo & Mono Counties will continue and build on a multi-faceted approach in increasing the capacity of a trained HICAP Volunteer base, and increasing education and outreach events in the community; with the purpose to provide high level Medicare Counseling services to our communities and meet / exceed program performance measurements.

Over the course of the previous fiscal year, COAOC reviewed the program organizational structure and determined that a reorganization was necessary to best maximize program resources and increase services at the community level. To accomplish this, COAOC has departmentalized key program responsibilities, with the Program Director and Manager overseeing program planning and project management. The key departments created consist of: Volunteer Department, General Education & Outreach, Latino Education & Outreach, and Call Center Operations. Supervising Coordinators in each department, lead project delivery with supporting Specialist positions.

So to meet the demand of HICAP services across our service areas, HICAP will work to increase the volunteer capacity at individual one-on-one counseling sites throughout the County. COAOC recognizes that the increasing demand for HICAP services must be answered through a strong HICAP Volunteer base, so to match the overall growth of the program, the County's Medicare population and to successfully deliver targeted projects, such as the Medicare Part D Annual Enrollment Clinics and the continuing MIPPA project. To increase the HICAP volunteer base in the contract period, the HICAP will work towards three goals: community relationship building, building the volunteer base, and improving HICAP volunteer counselor development trainings. Each individual goal will be met with deliverables aimed at improving the volunteer experience and in turn, increase the overall program capacity to serve more clients. In FY 2015/2016, the HICAP will be responsible for providing services for a minimum of 2,727 Riverside County Medicare beneficiaries and persons imminent to the Medicare program. Within the contract period, the HICAP utilizes a combination of in-person counseling sessions at our partnered

counseling sites and expedited counseling throughout the HICAP Call Center. This counseling strategy, along with the counseling support of the expanded HICAP Call Center, the program will be well positioned in meeting all annual deliverables.

The HICAP Call Center provides immediate counseling services, assistance, and in-person appointment scheduling to the County's Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers. Where counseling services include, general Medicare topics, New to Medicare counseling, the Dual Eligible Demonstration project, MIPPA counseling and application assistance, Medicare options counseling, MA and Part D comparisons, Medicare billing assistance, Medicare Appeals assistance, Long Term Care Insurance Counseling, and etc.

So to ensure HICAP Counselors are appropriately trained on new topics affecting the Medicare program and our county's Medicare beneficiaries, the HICAP will continue to offer HICAP Roundtable trainings for complex case review, and monthly HICAP In-Service Meetings spotlighting Medicare updates and topical presentations.

To concentrate the efforts towards Volunteer recruitment, training and development; the HICAP will rely on a staff department team consisting of a supervising Volunteer Coordinator, a Volunteer Specialist responsible for recruitment and training in the Riverside County service area, and a Volunteer Admin. & Training Specialist that will act as a lead for administrative duties and an enhanced trainer to facilitate new and continuing education. The Volunteer Specialist position and Volunteer Admin & Training Specialist, are new positions in the HICAP organizational structure, and demonstrate the program's ability to provide new solutions as to meet increasing demand in a cost-efficient and effective manner.

- C. Describe any experience in providing public education, training, or public informational presentations. Demonstrate the ability to learn about and perform in areas of government programs, long-term care planning, and consumer protection issues.

HICAP of Riverside County utilizes a staff education and outreach team, composing of General Education and Outreach, and specialized Latino Education and Outreach. All staff members undergo continuous update trainings in order to maintain HICAP registration, and to provide up-to-date information and topics to the community. As of May 2015, the HICAP will have completed 205 public and media events, comprising of interactive presentations, booth/exhibits, and enrollment events. The HICAP Education and Outreach departments, are the primary method in our education and community awareness strategy.

The HICAP coordinates General Education & Outreach, and Latino Education & Outreach (bilingual English-Spanish), through Supervising Coordinators for each department overseeing an Education and Outreach Specialist. This method ensures that as demand for HICAP presentations and event participation increases, the HICAP will be well positioned to accommodate community needs. Furthermore, as more HICAP Volunteers build a stronger Medicare knowledge base, and begin meeting registration requirements to become HICAP General Educators. Selection of volunteers to assist in

Public and Media events, and work alongside our staff Education Departments to reach more beneficiaries.

Public education and information presentations offered by the HICAP, include topics ranging from, but are not limited to, Roadmap to Medicare, MIPPA and the HICAP Benefits Enrollment Center, the California Coordinated Care Initiative (CCI) / Cal-MediConnect, Medicare and other health insurance products, long term care insurance, and etc., while adapting curriculums to best meet the needs of the target audience.

In addition, the HICAP Program Manager acts as the lead Medicare trainer, where they attend bi-annual California Department of Aging HICAP Conferences. This allows the Program Manager to be fully updated with trending topics affecting Medicare beneficiaries, and networks with other programs to incorporate best practices to improve and increase HICAP community education.

The HICAP partners with other aligned Community Based Organizations and government agencies, to raise awareness of available HICAP services, educate professionals serving Medicare beneficiaries, and addressing trends affecting Riverside County Medicare beneficiaries as a population, such as denials of service or balanced billing.

STAFFING CAPABILITY AND PATTERN

A. Describe the staffing pattern that is proposed for HICAP services, and include job titles where applicable, and supervisory lines of authority.

HICAP of Riverside County utilizes a combination of paid-staff HICAP Counselors and volunteer HICAP Counselor support to deliver HICAP services to the Riverside County community. The HICAP staffing pattern relies on teams responsible for defined HICAP service functions.

COAOC HICAP Program Director, supervises HICAP Program Managers serving Orange, Riverside and San Bernardino Counties. Supervises HICAP Medicare Appeals Advocate.

HICAP Program Manager, oversees program operations and supervises HICAP Operations Coordinator, Volunteer Coordinator, Education and Outreach Coordinator, and Latino Education and Outreach Coordinator.

HICAP Operations Coordinator, supervises HICAP Call Center Specialists.

HICAP Call Center Specialist, staffed HICAP Counselors providing continuous HICAP Call Center Coverage and case management. Includes, English-Spanish Bilingual HICAP Call Center Specialist.

HICAP Volunteer Coordinator, supervises Volunteers. Trains and recruits new Volunteer Counselors. Supervises Volunteer Admin & Training Specialist.

HICAP Volunteer Admin. & Training Specialist, administrative lead for Volunteer department. Facilitates enhanced training for volunteer counselors.

HICAP Education and Outreach Coordinator, supervises and coordinates with Education and Outreach Specialist. Conducts presentations and participates in community events.

HICAP Education and Outreach Specialist, conducts presentations and participates in community events.

HICAP Latino Education and Outreach Coordinator, supervises and coordinates with Latino Education and Outreach Specialist. Conducts Hispanic community targeted presentations and community events.

HICAP Latino Education and Outreach Specialist, Conducts Hispanic community targeted presentations and community events.

HICAP Benefits Enrollment Center and Medicare Benefits Specialist, supervises and coordinates with HICAP Benefits Enrollment Center and Medicare Benefits Counselor. Responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Benefits Enrollment Center and Medicare Benefits Counselor, responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Regional Coordinator, responsible for Inyo and Mono County HICAP Counseling and Community presentations/events.

B. Describe the project management, technical staff, and the effective use of a broad cadre of volunteer HICAP Counselors. Describe technical staff functions and general duties, including those responsibilities that will be assigned to volunteer HICAP Counselors.

HICAP of Riverside County utilizes a combination of technical staff and volunteer HICAP Counselors to meet the demands and individual project goals.

The HICAP Program Director and Program Manager, are responsible for the strategic planning and goals so as to meet and/or exceed program deliverables.

The ongoing project to provide Counseling services and outreach to the Riverside County Community, utilizes the expertise of the technical staff departments: Call Center, Volunteers, Education and Outreach, and Latino Education and Outreach, to ensure a multifaceted approach to increasing awareness of HICAP services, educating the public, and providing individual counseling services.

To increase staff specialization to meet overall program deliverables, each HICAP department comprises a supervising coordinator and subordinate technical specialist. Among each of the Coordinator positions, a new addition in the contract period is the HICAP Operations Coordinator. This position directly supervises a team of HICAP Call Center Staff Specialists, to ensure a high-quality counseling experience for the Riverside / Inyo & Mono County Medicare beneficiaries. In addition, the HICAP Operations Coordinator, also oversees the BEC Staff positions, which focus on the MIPPA project delivery.

Volunteerism is a key function of successfully meeting program deliverables, therefore Volunteer recruitment and training is an ongoing and continuous effort at all times.

State registered Volunteer HICAP Counselors provide in-person counseling at 26 partnering sites throughout Riverside County. In addition, registered Volunteer HICAP Counselors participate in Education and Outreach, Long Term Care Insurance Counseling, MIPPA outreach, AEP Enrollment Clinic Counseling, and other State / Federal projects related HICAP as they are implemented.

To facilitate the growth of the program, funds in the contract period will be used to increase the exposure of the program through a combination of staffing and related operational costs detailed in the provided budget.

COORDINATION WITH NETWORK OF AGING SERVICES

- A. Describe the methods that will be employed to coordinate with other aging/senior network services, community based services, and other HICAP services.

HICAP of Riverside County acts a clearinghouse of resources when assisting HICAP clients, and works to connect the client with the appropriate aging/senior network services or community based services as necessary.

When a Riverside County client seeks to utilize available HICAP services, HICAP of Riverside County works to provide the needed counseling services by scheduling the client to meet with a Counselor at one of the 26 in-person counseling sites throughout the County. Or, at the discretion of the client, provide counseling services over the phone through our HICAP Call Center.

The HICAP Education and Outreach team coordinate with aligned community partners to increase the awareness of HICAP services in the community.

As outreach efforts are increased in the contract period, standard coordination practices will continue to raise awareness of HICAP services, and to link HICAP clients to available programs through the Riverside County ADRC, and other Community Based Organizations.

- B. Describe the proposer agency's experience in cooperative relationships with community based services. Describe experience, if any, working with regulatory agencies at the state and federal levels.

HICAP of Riverside County works closely and cooperatively with aligned community based organizations / services in Riverside County as to best serve the County's HICAP clients, seniors, persons with disabilities, and their caregivers.

Due to the nature of HICAP scope of work, collaboration with State and Federal Regulatory Agencies at times may be necessary.

HICAP of Riverside County works with California Department of Aging on an ongoing basis so to ensure an efficient running program. Participation in workgroups and stakeholder groups, are the extent to work with other regulatory agencies. For example, in participation in collaborates focused on trends affecting beneficiaries through the California Coordinated Care Initiative / Financial Alignment. Other examples of where the HICAP will work directly with regulatory agencies, is when assisting a client with the Medicare appeals process up to the Administrative Law Judge level, or at times directly with CMS to resolve specific technical issue(s) affecting a beneficiary.

- C. Describe the coordination between the counseling and legal services, as required by law. Indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP of Riverside County utilizes its network of staff and volunteer HICAP Counselors to provide preliminary Medicare counseling services to Riverside County Medicare beneficiaries, under the review of the HICAP Program Manager.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assess the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

The Medicare Appeals Advocate is the primary managing Counselor concerning the Medicare Appeals process. When encountering a client that needs assistance with a Medicare denied service the Staff Appeals Advocate, will either work with the Primary Counselor to assist clients with Medicare appeals, or assume the case entirely and work directly with the client to pursue resolution. The Appeals Advocates assists in all Medicare denied services, up to and including the Administrative Law Judge level.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to Riverside County Legal Services.

COAOC is currently pursuing to establish an MOU with Inland County Legal Services

OUTREACH AND PUBLICITY

- A. Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Riverside County will continue and expand currently implemented strategies for education and outreach, and Latino Education and Outreach through the contract period. The HICAP will meet performance measurements related to Outreach and Publicity, through a combination of Staff and Volunteer HICAP Counselors. HICAP General

Educators will provide interactive presentations, booth/exhibits at partnering pharmacies and health / senior fairs, stakeholder groups / collaborates, and other community events.

In addition to a continuation of current Education and Outreach strategies, HICAP will expand its HICAP - Benefits Enrollment Center to provide increased MIPPA services to the Riverside County community. This will translate into additional topical presentations aimed at Part D enrollment assistance, Medicare Preventive Benefits, and Part D Limited Income Subsidy / Medicare Savings Program application assistance.

In the contract period, the Medicare Annual Election Period will be a primary topic concerning Medicare beneficiaries. To address this demand, the HICAP Education and Outreach departments will provide specialized topical presentations on 2016 Medicare changes. To support and build awareness of HICAP Medicare Part D Annual Enrollment Clinics, COAOC / HICAP will run a series of newspaper advertisement highlight clinic availability. Specialized Medicare Annual Enrollment Clinic fliers, will be distributed at health fairs and at partnering Senior / Community Centers.

- B.** Describe how the agency would conduct market research, how an eligible person would find out about the HICAP services, and what methods you would use to bring them into the system.

HICAP of Riverside County, incorporates market research strategy into the HICAP client intake process. Prior to delivering counseling services, all HICAP Counselors obtain a set of data from their client to be uploaded into the California Department of Aging's Statewide HICAP Annual Reporting Program (SHARP) database.

Along with information needed to complete the client profile, HICAP Counselors ask how their client had learned about the program.

To accompany this question, HICAP of Riverside County has trained HICAP Counselors how to document this answer, and has expanded the reporting parameters to better identify the effectiveness of individual media campaigns.

This methodology will be employed in the contract period, accompanying any planned campaign strategies.

INYO/MONO AREA AGENCY PROGRAM SUPPORT

- A.** Describe how the agency will assist the Inyo/Mono Area Agency with program and technical support as described in Section L., Office on Aging Requirements

COAOC provides HICAP services in Inyo and Mono Counties, as HICAP of Inyo and Mono Counties.

Under the supervision of the HICAP Program Manager and the HICAP Program Director, the Inyo and Mono County HICAP Regional Coordinator provides HICAP services through one-on-one counseling, and conducts interactive presentations, booth/exhibits, and other Public and Media events.

In addition, the HICAP Call Center provides additional coverage to Inyo and Mono county residents during periods of high demand such as the Medicare Annual Election period, and throughout the year.

The HICAP Program Manager and the Regional Coordinator, will continue to provide program technical support to the Inyo/Mono Area Agency.

- B.** Describe the coordination between the counseling and legal services, as required by law, indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP Counseling and legal services are coordinated through a combination of staff and volunteer HICAP Counselors in the Inyo and Mono County service area.

In-person counseling services are provided by the HICAP Regional Coordinator in the Inyo and Mono Counties, with volunteer HICAP Counselor support to provide increased counseling capacity. In addition, the HICAP Call Center provides added counseling capacity for the communities' Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assesses the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to the county Legal Services.

OUTREACH AND PUBLICITY

- A.** Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Inyo and Mono Counties provides community education events throughout PSA 16, including interactive presentations, operating booth/exhibits at health fairs and events, enrollment events, and other Public and Media events.

COAOC / HICAP of Inyo and Mono Counties will incorporate ad placement in key Inyo and Mono county newspapers to increase awareness of HICAP services.

Through a combination of the planned Media campaign strategy and ongoing outreach and education activities, HICAP will continue to provide increased services throughout PSA 16.

ATTACHMENT A

SCOPE OF WORK
FY 2015 – 2016
April 1, 2016 – June 30, 2016 (Three Months)

COUNCIL ON AGING ORANGE COUNTY
HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM
(HICAP Funds)

PROGRAM DESCRIPTION

- A. Describe the proposer agency's interest in providing the HICAP services, and the overall concept that the agency intends to use in the provision of HICAP services. Explain the qualifications and accomplishments that would indicate the proposer's ability to deliver the services by this RFP. Document any previous relevant training and experience applicable to HICAP services.

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HICAP Operations Coordinator, supervises HICAP Call Center Specialists.

HICAP Call Center Specialist, staffed HICAP Counselors providing continuous HICAP Call Center Coverage and case management. Includes, English-Spanish Bilingual HICAP Call Center Specialist.

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HICAP Volunteer Admin. & Training Specialist, administrative lead for Volunteer department. Facilitates enhanced training for volunteer counselors.

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To increase staff specialization to meet overall program deliverables, each HICAP department comprises a supervising coordinator and subordinate technical specialist. Among each of the Coordinator positions, a new addition in the contract period is the HICAP Operations Coordinator. This position directly supervises a team of HICAP Call Center Staff Specialists, to ensure a high-quality counseling experience for the Riverside / Inyo & Mono County Medicare beneficiaries. In addition, the HICAP Operations Coordinator, also oversees the BEC Staff positions, which focus on the MIPPA project delivery.

Volunteerism is a key function of successfully meeting program deliverables, therefore Volunteer recruitment and training is an ongoing and continuous effort at all times.

State registered Volunteer HICAP Counselors provide in-person counseling at 26 partnering sites throughout Riverside County. In addition, registered Volunteer HICAP Counselors participate in Education and Outreach, Long Term Care Insurance Counseling, MIPPA outreach, AEP Enrollment Clinic Counseling, and other State / Federal projects related HICAP as they are implemented.

To facilitate the growth of the program, funds in the contract period will be used to increase the exposure of the program through a combination of staffing and related operational costs detailed in the provided budget.

COORDINATION WITH NETWORK OF AGING SERVICES

A. Describe the methods that will be employed to coordinate with other aging/senior network services, community based services, and other HICAP services.

HICAP of Riverside County acts a clearinghouse of resources when assisting HICAP clients, and works to connect the client with the appropriate aging/senior network services or community based services as necessary.

When a Riverside County client seeks to utilize available HICAP services, HICAP of Riverside County works to provide the needed counseling services by scheduling the client to meet with a Counselor at one of the 26 in-person counseling sites throughout the County. Or, at the discretion of the client, provide counseling services over the phone through our HICAP Call Center.

The HICAP Education and Outreach team coordinate with aligned community partners to increase the awareness of HICAP services in the community.

As outreach efforts are increased in the contract period, standard coordination practices will continue to raise awareness of HICAP services, and to link HICAP clients to available programs through the Riverside County ADRC, and other Community Based Organizations.

B. Describe the proposer agency's experience in cooperative relationships with community based services. Describe experience, if any, working with regulatory agencies at the state and federal levels.

HICAP of Riverside County works closely and cooperatively with aligned community based organizations / services in Riverside County as to best serve the County's HICAP clients, seniors, persons with disabilities, and their caregivers.

Due to the nature of HICAP scope of work, collaboration with State and Federal Regulatory Agencies at times may be necessary.

HICAP of Riverside County works with California Department of Aging on an ongoing basis so to ensure an efficient running program. Participation in workgroups and stakeholder groups, are the extent to work with other regulatory agencies. For example, in participation in collaborates focused on trends affecting beneficiaries through the California Coordinated Care Initiative / Financial Alignment. Other examples of where the HICAP will work directly with regulatory agencies, is when assisting a client with the Medicare appeals process up to the Administrative Law Judge level, or at times directly with CMS to resolve specific technical issue(s) affecting a beneficiary.

- C. Describe the coordination between the counseling and legal services, as required by law. Indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP of Riverside County utilizes its network of staff and volunteer HICAP Counselors to provide preliminary Medicare counseling services to Riverside County Medicare beneficiaries, under the review of the HICAP Program Manager.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assess the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

The Medicare Appeals Advocate is the primary managing Counselor concerning the Medicare Appeals process. When encountering a client that needs assistance with a Medicare denied service the Staff Appeals Advocate, will either work with the Primary Counselor to assist clients with Medicare appeals, or assume the case entirely and work directly with the client to pursue resolution. The Appeals Advocates assists in all Medicare denied services, up to and including the Administrative Law Judge level.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to Riverside County Legal Services.

COAOC is currently pursuing to establish an MOU with Inland County Legal Services

OUTREACH AND PUBLICITY

- A. Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Riverside County will continue and expand currently implemented strategies for education and outreach, and Latino Education and Outreach through the contract period. The HICAP will meet performance measurements related to Outreach and Publicity, through a combination of Staff and Volunteer HICAP Counselors. HICAP General

Educators will provide interactive presentations, booth/exhibits at partnering pharmacies and health / senior fairs, stakeholder groups / collaborates, and other community events.

In addition to a continuation of current Education and Outreach strategies, HICAP will expand its HICAP - Benefits Enrollment Center to provide increased MIPPA services to the Riverside County community. This will translate into additional topical presentations aimed at Part D enrollment assistance, Medicare Preventive Benefits, and Part D Limited Income Subsidy / Medicare Savings Program application assistance.

In the contract period, the Medicare Annual Election Period will be a primary topic concerning Medicare beneficiaries. To address this demand, the HICAP Education and Outreach departments will provide specialized topical presentations on 2016 Medicare changes. To support and build awareness of HICAP Medicare Part D Annual Enrollment Clinics, COAOC / HICAP will run a series of newspaper advertisement highlight clinic availability. Specialized Medicare Annual Enrollment Clinic fliers, will be distributed at health fairs and at partnering Senior / Community Centers.

- B.** Describe how the agency would conduct market research, how an eligible person would find out about the HICAP services, and what methods you would use to bring them into the system.

HICAP of Riverside County, incorporates market research strategy into the HICAP client intake process. Prior to delivering counseling services, all HICAP Counselors obtain a set of data from their client to be uploaded into the California Department of Aging's Statewide HICAP Annual Reporting Program (SHARP) database.

Along with information needed to complete the client profile, HICAP Counselors ask how their client had learned about the program.

To accompany this question, HICAP of Riverside County has trained HICAP Counselors how to document this answer, and has expanded the reporting parameters to better identify the effectiveness of individual media campaigns.

This methodology will be employed in the contract period, accompanying any planned campaign strategies.

INYO/MONO AREA AGENCY PROGRAM SUPPORT

- A.** Describe how the agency will assist the Inyo/Mono Area Agency with program and technical support as described in Section L., Office on Aging Requirements

COAOC provides HICAP services in Inyo and Mono Counties, as HICAP of Inyo and Mono Counties.

Under the supervision of the HICAP Program Manager and the HICAP Program Director, the Inyo and Mono County HICAP Regional Coordinator provides HICAP services through one-on-one counseling, and conducts interactive presentations, booth/exhibits, and other Public and Media events.

In addition, the HICAP Call Center provides additional coverage to Inyo and Mono county residents during periods of high demand such as the Medicare Annual Election period, and throughout the year.

The HICAP Program Manager and the Regional Coordinator, will continue to provide program technical support to the Inyo/Mono Area Agency.

- B.** Describe the coordination between the counseling and legal services, as required by law, indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP Counseling and legal services are coordinated through a combination of staff and volunteer HICAP Counselors in the Inyo and Mono County service area.

In-person counseling services are provided by the HICAP Regional Coordinator in the Inyo and Mono Counties, with volunteer HICAP Counselor support to provide increased counseling capacity. In addition, the HICAP Call Center provides added counseling capacity for the communities' Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assesses the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to the county Legal Services.

OUTREACH AND PUBLICITY

- A.** Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Inyo and Mono Counties provides community education events throughout PSA 16, including interactive presentations, operating booth/exhibits at health fairs and events, enrollment events, and other Public and Media events.

COAOC / HICAP of Inyo and Mono Counties will incorporate ad placement in key Inyo and Mono county newspapers to increase awareness of HICAP services.

Through a combination of the planned Media campaign strategy and ongoing outreach and education activities, HICAP will continue to provide increased services throughout PSA 16.

ATTACHMENT A

SCOPE OF WORK FY 2015 – 2016 April 1, 2016 – June 30, 2016 (Three Months)

COUNCIL ON AGING ORANGE COUNTY HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (Ins. Fund)

PROGRAM DESCRIPTION

- A. Describe the proposer agency's interest in providing the HICAP services, and the overall concept that the agency intends to use in the provision of HICAP services. Explain the qualifications and accomplishments that would indicate the proposer's ability to deliver the services by this RFP. Document any previous relevant training and experience applicable to HICAP services.

The Council on Aging - Orange County / HICAP of Riverside County currently provides Health Insurance Counseling & Advocacy Program services to Medicare beneficiaries and persons imminent to the Medicare program in Riverside, Inyo and Mono Counties. COAOC has operated as the contractor since October 2012, and currently operates through a combination of Staff and Volunteer HICAP Counselors that provide one-on-one counseling services through a combination of 26 in-person counseling sites located throughout the Riverside County service area, the HICAP Office/Call Center located in Rancho Cucamonga. In FY 2013/2014, HICAP of Riverside County assisted 2,581 Riverside County clients, 127% of the State benchmark, achieving 4 out of 7 exemplary level attainments in HICAP performance measurements.

As of June 22, 2015 for FY 2014/2015, COAOC/HICAP of Riverside County is expected to exceed the performance measure of served clients, 2,565 Medicare beneficiaries, by approximately 9 percent. This interprets as COAOC / HICAP of Riverside County serving approximately 2,800 client in FY 2014/2015.

The HICAP Program Manager regularly attends the California Department of Aging biannual HICAP Conference, so as to increase program knowledge on select Medicare topics, and to incorporate into monthly in-service trainings and round tables to ensure HICAP Counselors are knowledgeable on topics affecting their communities.

HICAP participates in monthly Medicare technical assistance calls hosted by the California Health Advocates. The technical assistance calls allow for the Program Manager to present issues facing the Riverside County community in terms of their Medicare benefits, and allows for a cross-county collaborative approach in terms of complex case resolution. The HICAP participates in additional trainings conducted by the National Council on Aging, Justice in Aging, and the California Health Advocates; on timely topics ranging from Covered CA for Medicare beneficiaries, the California Coordinated Care Initiative / Cal MediConnect Basic and Advanced Trainings, MIPPA topics, and etc.

HICAP of Riverside County / HICAP of Inyo and Mono Counties intends to further expand HICAP services in the Riverside County and Inyo & Mono County communities through a multi-pronged approach so to increase the HICAP Volunteer base, increase Education and Outreach efforts, and to increase services to the community. This will be accomplished by expanding the HICAP staffing levels, and implementation of an organizational structure that departmentalizes key program responsibilities: Volunteers, General Education & Outreach, Latino Education & Outreach, and Call Center Operations.

- B.** Describe the proposed strategies and methods that will be used to provide the HICAP services to the broadest possible targeted population. Include who will be served, how, where, and when the services allowed under HICAP will operate. Describe the different levels of services allowable under HICAP rules and demonstrate an understanding of the requirements, responsibilities, and technical training need for operating a HICAP. Describe how these services would be managed in a cost efficient and effective manner by the proposer agency. Include a statement of how the program will satisfy the service requirements outlined in the RFP and the agency's understanding of HICAP specifications.

HICAP of Riverside County / HICAP of Inyo & Mono Counties will continue and build on a multi-faceted approach in increasing the capacity of a trained HICAP Volunteer base, and increasing education and outreach events in the community; with the purpose to provide high level Medicare Counseling services to our communities and meet / exceed program performance measurements.

Over the course of the previous fiscal year, COAOC reviewed the program organizational structure and determined that a reorganization was necessary to best maximize program resources and increase services at the community level. To accomplish this, COAOC has departmentalized key program responsibilities, with the Program Director and Manager overseeing program planning and project management. The key departments created consist of: Volunteer Department, General Education & Outreach, Latino Education & Outreach, and Call Center Operations. Supervising Coordinators in each department, lead project delivery with supporting Specialist positions.

So to meet the demand of HICAP services across our service areas, HICAP will work to increase the volunteer capacity at individual one-on-one counseling sites throughout the County. COAOC recognizes that the increasing demand for HICAP services must be answered through a strong HICAP Volunteer base, so to match the overall growth of the program, the County's Medicare population and to successfully deliver targeted projects, such as the Medicare Part D Annual Enrollment Clinics and the continuing MIPPA project. To increase the HICAP volunteer base in the contract period, the HICAP will work towards three goals: community relationship building, building the volunteer base, and improving HICAP volunteer counselor development trainings. Each individual goal will be met with deliverables aimed at improving the volunteer experience and in turn, increase the overall program capacity to serve more clients. In FY 2015/2016, the HICAP will be responsible for providing services for a minimum of 2,727 Riverside County Medicare beneficiaries and persons imminent to the Medicare program. Within the contract period, the HICAP utilizes a combination of in-person counseling sessions at our partnered

counseling sites and expedited counseling throughout the HICAP Call Center. This counseling strategy, along with the counseling support of the expanded HICAP Call Center, the program will be well positioned in meeting all annual deliverables.

The HICAP Call Center provides immediate counseling services, assistance, and in-person appointment scheduling to the County's Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers. Where counseling services include, general Medicare topics, New to Medicare counseling, the Dual Eligible Demonstration project, MIPPA counseling and application assistance, Medicare options counseling, MA and Part D comparisons, Medicare billing assistance, Medicare Appeals assistance, Long Term Care Insurance Counseling, and etc.

So to ensure HICAP Counselors are appropriately trained on new topics affecting the Medicare program and our county's Medicare beneficiaries, the HICAP will continue to offer HICAP Roundtable trainings for complex case review, and monthly HICAP In-Service Meetings spotlighting Medicare updates and topical presentations.

To concentrate the efforts towards Volunteer recruitment, training and development; the HICAP will rely on a staff department team consisting of a supervising Volunteer Coordinator, a Volunteer Specialist responsible for recruitment and training in the Riverside County service area, and a Volunteer Admin. & Training Specialist that will act as a lead for administrative duties and an enhanced trainer to facilitate new and continuing education. The Volunteer Specialist position and Volunteer Admin & Training Specialist, are new positions in the HICAP organizational structure, and demonstrate the program's ability to provide new solutions as to meet increasing demand in a cost-efficient and effective manner.

- C. Describe any experience in providing public education, training, or public informational presentations. Demonstrate the ability to learn about and perform in areas of government programs, long-term care planning, and consumer protection issues.

HICAP of Riverside County utilizes a staff education and outreach team, composing of General Education and Outreach, and specialized Latino Education and Outreach. All staff members undergo continuous update trainings in order to maintain HICAP registration, and to provide up-to-date information and topics to the community. As of May 2015, the HICAP will have completed 205 public and media events, comprising of interactive presentations, booth/exhibits, and enrollment events. The HICAP Education and Outreach departments, are the primary method in our education and community awareness strategy.

The HICAP coordinates General Education & Outreach, and Latino Education & Outreach (bilingual English-Spanish), through Supervising Coordinators for each department overseeing an Education and Outreach Specialist. This method ensures that as demand for HICAP presentations and event participation increases, the HICAP will be well positioned to accommodate community needs. Furthermore, as more HICAP Volunteers build a stronger Medicare knowledge base, and begin meeting registration requirements to become HICAP General Educators. Selection of volunteers to assist in

Public and Media events, and work alongside our staff Education Departments to reach more beneficiaries.

Public education and information presentations offered by the HICAP, include topics ranging from, but are not limited to, Roadmap to Medicare, MIPPA and the HICAP Benefits Enrollment Center, the California Coordinated Care Initiative (CCI) / Cal-MediConnect, Medicare and other health insurance products, long term care insurance, and etc., while adapting curriculums to best meet the needs of the target audience.

In addition, the HICAP Program Manager acts as the lead Medicare trainer, where they attend bi-annual California Department of Aging HICAP Conferences. This allows the Program Manager to be fully updated with trending topics affecting Medicare beneficiaries, and networks with other programs to incorporate best practices to improve and increase HICAP community education.

The HICAP partners with other aligned Community Based Organizations and government agencies, to raise awareness of available HICAP services, educate professionals serving Medicare beneficiaries, and addressing trends affecting Riverside County Medicare beneficiaries as a population, such as denials of service or balanced billing.

STAFFING CAPABILITY AND PATTERN

A. Describe the staffing pattern that is proposed for HICAP services, and include job titles where applicable, and supervisory lines of authority.

HICAP of Riverside County utilizes a combination of paid-staff HICAP Counselors and volunteer HICAP Counselor support to deliver HICAP services to the Riverside County community. The HICAP staffing pattern relies on teams responsible for defined HICAP service functions.

COAOC HICAP Program Director, supervises HICAP Program Managers serving Orange, Riverside and San Bernardino Counties. Supervises HICAP Medicare Appeals Advocate.

HICAP Program Manager, oversees program operations and supervises HICAP Operations Coordinator, Volunteer Coordinator, Education and Outreach Coordinator, and Latino Education and Outreach Coordinator.

HICAP Operations Coordinator, supervises HICAP Call Center Specialists.

HICAP Call Center Specialist, staffed HICAP Counselors providing continuous HICAP Call Center Coverage and case management. Includes, English-Spanish Bilingual HICAP Call Center Specialist.

HICAP Volunteer Coordinator, supervises Volunteers. Trains and recruits new Volunteer Counselors. Supervises Volunteer Admin & Training Specialist.

HICAP Volunteer Admin. & Training Specialist, administrative lead for Volunteer department. Facilitates enhanced training for volunteer counselors.

HICAP Education and Outreach Coordinator, supervises and coordinates with Education and Outreach Specialist. Conducts presentations and participates in community events.

HICAP Education and Outreach Specialist, conducts presentations and participates in community events.

HICAP Latino Education and Outreach Coordinator, supervises and coordinates with Latino Education and Outreach Specialist. Conducts Hispanic community targeted presentations and community events.

HICAP Latino Education and Outreach Specialist, Conducts Hispanic community targeted presentations and community events.

HICAP Benefits Enrollment Center and Medicare Benefits Specialist, supervises and coordinates with HICAP Benefits Enrollment Center and Medicare Benefits Counselor. Responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Benefits Enrollment Center and Medicare Benefits Counselor, responsible for Medicare Counseling and MIPPA Counseling and application assistance.

HICAP Regional Coordinator, responsible for Inyo and Mono County HICAP Counseling and Community presentations/events.

B. Describe the project management, technical staff, and the effective use of a broad cadre of volunteer HICAP Counselors. Describe technical staff functions and general duties, including those responsibilities that will be assigned to volunteer HICAP Counselors.

HICAP of Riverside County utilizes a combination of technical staff and volunteer HICAP Counselors to meet the demands and individual project goals.

The HICAP Program Director and Program Manager, are responsible for the strategic planning and goals so as to meet and/or exceed program deliverables.

The ongoing project to provide Counseling services and outreach to the Riverside County Community, utilizes the expertise of the technical staff departments: Call Center, Volunteers, Education and Outreach, and Latino Education and Outreach, to ensure a multifaceted approach to increasing awareness of HICAP services, educating the public, and providing individual counseling services.

To increase staff specialization to meet overall program deliverables, each HICAP department comprises a supervising coordinator and subordinate technical specialist. Among each of the Coordinator positions, a new addition in the contract period is the HICAP Operations Coordinator. This position directly supervises a team of HICAP Call Center Staff Specialists, to ensure a high-quality counseling experience for the Riverside / Inyo & Mono County Medicare beneficiaries. In addition, the HICAP Operations Coordinator, also oversees the BEC Staff positions, which focus on the MIPPA project delivery.

Volunteerism is a key function of successfully meeting program deliverables, therefore Volunteer recruitment and training is an ongoing and continuous effort at all times.

State registered Volunteer HICAP Counselors provide in-person counseling at 26 partnering sites throughout Riverside County. In addition, registered Volunteer HICAP Counselors participate in Education and Outreach, Long Term Care Insurance Counseling, MIPPA outreach, AEP Enrollment Clinic Counseling, and other State / Federal projects related HICAP as they are implemented.

To facilitate the growth of the program, funds in the contract period will be used to increase the exposure of the program through a combination of staffing and related operational costs detailed in the provided budget.

COORDINATION WITH NETWORK OF AGING SERVICES

A. Describe the methods that will be employed to coordinate with other aging/senior network services, community based services, and other HICAP services.

HICAP of Riverside County acts a clearinghouse of resources when assisting HICAP clients, and works to connect the client with the appropriate aging/senior network services or community based services as necessary.

When a Riverside County client seeks to utilize available HICAP services, HICAP of Riverside County works to provide the needed counseling services by scheduling the client to meet with a Counselor at one of the 26 in-person counseling sites throughout the County. Or, at the discretion of the client, provide counseling services over the phone through our HICAP Call Center.

The HICAP Education and Outreach team coordinate with aligned community partners to increase the awareness of HICAP services in the community.

As outreach efforts are increased in the contract period, standard coordination practices will continue to raise awareness of HICAP services, and to link HICAP clients to available programs through the Riverside County ADRC, and other Community Based Organizations.

B. Describe the proposer agency's experience in cooperative relationships with community based services. Describe experience, if any, working with regulatory agencies at the state and federal levels.

HICAP of Riverside County works closely and cooperatively with aligned community based organizations / services in Riverside County as to best serve the County's HICAP clients, seniors, persons with disabilities, and their caregivers.

Due to the nature of HICAP scope of work, collaboration with State and Federal Regulatory Agencies at times may be necessary.

HICAP of Riverside County works with California Department of Aging on an ongoing basis so to ensure an efficient running program. Participation in workgroups and stakeholder groups, are the extent to work with other regulatory agencies. For example, in participation in collaborates focused on trends affecting beneficiaries through the California Coordinated Care Initiative / Financial Alignment. Other examples of where the HICAP will work directly with regulatory agencies, is when assisting a client with the Medicare appeals process up to the Administrative Law Judge level, or at times directly with CMS to resolve specific technical issue(s) affecting a beneficiary.

- C. Describe the coordination between the counseling and legal services, as required by law. Indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP of Riverside County utilizes its network of staff and volunteer HICAP Counselors to provide preliminary Medicare counseling services to Riverside County Medicare beneficiaries, under the review of the HICAP Program Manager.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assess the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

The Medicare Appeals Advocate is the primary managing Counselor concerning the Medicare Appeals process. When encountering a client that needs assistance with a Medicare denied service the Staff Appeals Advocate, will either work with the Primary Counselor to assist clients with Medicare appeals, or assume the case entirely and work directly with the client to pursue resolution. The Appeals Advocates assists in all Medicare denied services, up to and including the Administrative Law Judge level.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to Riverside County Legal Services.

COAOC is currently pursuing to establish an MOU with Inland County Legal Services

OUTREACH AND PUBLICITY

- A. Describe how the proposer agency intends to communicate with culturally diverse communities within the service jurisdiction and the underserved populations.

HICAP of Riverside County will continue and expand currently implemented strategies for education and outreach, and Latino Education and Outreach through the contract period. The HICAP will meet performance measurements related to Outreach and Publicity, through a combination of Staff and Volunteer HICAP Counselors. HICAP General

Educators will provide interactive presentations, booth/exhibits at partnering pharmacies and health / senior fairs, stakeholder groups / collaborates, and other community events.

In addition to a continuation of current Education and Outreach strategies, HICAP will expand its HICAP - Benefits Enrollment Center to provide increased MIPPA services to the Riverside County community. This will translate into additional topical presentations aimed at Part D enrollment assistance, Medicare Preventive Benefits, and Part D Limited Income Subsidy / Medicare Savings Program application assistance.

In the contract period, the Medicare Annual Election Period will be a primary topic concerning Medicare beneficiaries. To address this demand, the HICAP Education and Outreach departments will provide specialized topical presentations on 2016 Medicare changes. To support and build awareness of HICAP Medicare Part D Annual Enrollment Clinics, COAOC / HICAP will run a series of newspaper advertisement highlight clinic availability. Specialized Medicare Annual Enrollment Clinic fliers, will be distributed at health fairs and at partnering Senior / Community Centers.

- B.** Describe how the agency would conduct market research, how an eligible person would find out about the HICAP services, and what methods you would use to bring them into the system.

HICAP of Riverside County, incorporates market research strategy into the HICAP client intake process. Prior to delivering counseling services, all HICAP Counselors obtain a set of data from their client to be uploaded into the California Department of Aging's Statewide HICAP Annual Reporting Program (SHARP) database.

Along with information needed to complete the client profile, HICAP Counselors ask how their client had learned about the program.

To accompany this question, HICAP of Riverside County has trained HICAP Counselors how to document this answer, and has expanded the reporting parameters to better identify the effectiveness of individual media campaigns.

This methodology will be employed in the contract period, accompanying any planned campaign strategies.

INYO/MONO AREA AGENCY PROGRAM SUPPORT

- A.** Describe how the agency will assist the Inyo/Mono Area Agency with program and technical support as described in Section L., Office on Aging Requirements

COAOC provides HICAP services in Inyo and Mono Counties, as HICAP of Inyo and Mono Counties.

Under the supervision of the HICAP Program Manager and the HICAP Program Director, the Inyo and Mono County HICAP Regional Coordinator provides HICAP services through one-on-one counseling, and conducts interactive presentations, booth/exhibits, and other Public and Media events.

In addition, the HICAP Call Center provides additional coverage to Inyo and Mono county residents during periods of high demand such as the Medicare Annual Election period, and throughout the year.

The HICAP Program Manager and the Regional Coordinator, will continue to provide program technical support to the Inyo/Mono Area Agency.

- B.** Describe the coordination between the counseling and legal services, as required by law, indicate how the proposer agency will coordinate legal services/representation if contracted for.

HICAP Counseling and legal services are coordinated through a combination of staff and volunteer HICAP Counselors in the Inyo and Mono County service area.

In-person counseling services are provided by the HICAP Regional Coordinator in the Inyo and Mono Counties, with volunteer HICAP Counselor support to provide increased counseling capacity. In addition, the HICAP Call Center provides added counseling capacity for the communities' Medicare beneficiaries, persons imminent to the Medicare program, and their caregivers.

When a client case is determined to be in need of assistance with a Medicare appeal due to a denied service, the HICAP Program Manager assesses the individual case to determine the appropriate action needed with the aim to obtain successful resolution for the client.

If and when, an individual case is determined to be needing Medicare Appeals case management, the Program Manager will facilitate a case transfer to the COAOC Medicare Appeals Advocate.

If the Program Manager and/or Medicare Appeals Advocate determine an individual case to be beyond the scope of HICAP services, the HICAP Program Manager will initiate a referral to the county Legal Services.

OUTREACH AND PUBLICITY

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HICAP of Inyo and Mono Counties provides community education events throughout PSA 16, including interactive presentations, operating booth/exhibits at health fairs and events, enrollment events, and other Public and Media events.

COAOC / HICAP of Inyo and Mono Counties will incorporate ad placement in key Inyo and Mono county newspapers to increase awareness of HICAP services.

Through a combination of the planned Media campaign strategy and ongoing outreach and education activities, HICAP will continue to provide increased services throughout PSA 16.

ATTACHMENT B
ALLOCATION

THE UNIVERSITY OF CHICAGO

ATTACHMENT B
Vendor#

Contracts for Services Fiscal Year 2015/2016
July 1, 2015 through March 30, 2015
 (Nine Months)

Provider	Funding Source Project/Grant	Program	Unit of Service	Unit Description	CFDA #	Number of Units	Unit Rate	Federal Funds	State Funds	Total Contract Amount
Council On Aging 200 Santa Ana, CA 92705	OA51056FY16	HICAP	HICAP Reimbursement (Ins. Fund)		93.779	n/a	Expenses		\$143,044.00	
	OA51091FY16	HICAP	State HICAP Funds		93.779	n/a	Expenses		\$71,504.00	
	OA51098FY16	HICAP	HICAP Federal Base (SHIP Funds)		93.779	n/a	Expenses	\$133,301.00		
Total								\$133,301.00	\$214,548.00	\$347,849.00

ATTACHMENT B
Vendor#

Contracts for Services Fiscal Year 2015/2016
April 1, 2016 - June 30, 2016
(Three Months)

Provider	Funding Source Project/Grant	Program	Unit of Service	Unit Description	CFDA #	Number of Units	Unit Rate	Federal Funds	State Funds	Total Contract Amount
Council On Aging 1971 E. 4th Street, Suite 200 Santa Ana, CA 92705	OA51056FY16	HICAP	HICAP Reimbursement (Ins. Fund)		93.779	n/a	Expenses	\$0.00	\$47,675.00	
	OA51091FY16	HICAP	State HICAP Funds		93.779	n/a	Expenses	\$0.00	\$23,831.00	
	OA51098FY16	HICAP	HICAP Federal Base (SHIP Funds)		93.779	n/a	Expenses	\$43,996.00		
								\$43,996.00	\$71,506.00	\$115,502.00

ATTACHMENT C
BUDGET

中國圖書

中國圖書

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
 Contractor Budget: Program Resources
 Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
 Revision:
 OTO:

Contractor: Council on Aging
 Program and Service: HICAP-FUND
 Vendor #: 1234567890

Date: 09/02/2015

	DESCRIPTION OF REVENUE	FUNDING SOURCE	AMOUNT	
	RCOoA Award Amounts:			
11	Federal & State	HICAP-FUND	23,831	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		23,831	OK
17	Program Income (May not be used for match):			
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
22	Match Cash (From non-Federal sources):			
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
29	Match Third-Party In-Kind:			
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		23,831	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	2,648	0
Minimum Required Match	Title IIIE	25%	7,944	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-FUND
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	13,416				13,416
12 Payroll Taxes	1,026				1,026
13 Workers' Compensation	83				83
14 Other Benefits	1,264				1,264
15 Total Paid Personnel	15,789	0	0		15,789
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	15,789	0	0	0	15,789
18 Travel & Training *					0
Equipment					
20 Expendable Equipment (unit cost of < \$500)					0
21 Non-Expendable Equipment (unit cost ≥ \$500)					0
22 Total Equipment	0	0	0	0	0
23 Catered Food					0
24 Raw Food					0
25 Consultants *	181				181
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *	6,453				6,453
29 Utilities *	1,408				1,408
30 Office Expense *					0
31 Vehicle Operations and Maintenance *					0
32 Outside Services *					0
33 Accounting *					0
34 Audit * **					0
35 Volunteer Expense *					0
36 Insurance *					0
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *					0
39 Total Other Direct Expenses	7,861	0	0	0	7,861
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	23,831	0	0	0	23,831

OK
OK
OK
OK
OK

* Requires explanation
** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:
 Program Costs cell D41 must equal Program Resources cell G36.
 Program Costs cell E41 must equal Program Resources cell G21.
 Program Costs cell F41 must equal Program Resources cell G28.
 Program Costs cell H41 must equal Program Resources cell G34.
 Program Costs cell I41 must equal Program Resources cell G16.
 Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



RIVERSIDE COUNTY
OFFICE ON AGING



Riverside County Office on Aging

Contractor Budget: Explanations

Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
Revision:
OTO:

Contractor:

Council on Aging
HICAP-FUND
1234567890

Program and Service:

Vendor #:

Date: 09/02/2015

Budget Line Items	Line #	Total RCOoA	Explanation
Travel & Training *	18	0	
Consultants *	25	181	
Lease / Rent *	28	6,453	
Utilities *	29	1,408	
Office Expense *	30	0	
Vehicle Operations and Maintenance *	31	0	
Outside Services *	32	0	
Accounting *	33	0	
Audit * **	34	0	
Volunteer Expense *	35	0	To educate volunteers on program information and recognition
Insurance *	36	0	
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	0	
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original: X
Revision:
OTO:

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-FUND
1234567890

Date: 09/02/2015

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	HICAP Benefit Counselor	20.00	17.00	13	4,420	
2	Benefits Counselor	10.00	18.00	13	2,340	
3	LIA Counselor	20.00	17.00	13	4,420	
4	CEO/President	1.20	60.82	13	949	
5	Director of Finance	1.30	35.00	13	592	
6	Executive Assistant	1.33	17.00	13	294	
7	Accounting Assistant/Office Manager	1.35	15.00	13	263	
8	Receptionist	0.76	14.00	13	138	
9				13	0	
10				13	0	
11				13	0	
12				13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
	Total Salaries / Wages: Section A				13,416	
	Total Salaries / Wages: Section B				0	See detail in Section B
	Total Salaries / Wages: Section C				0	See detail in Section C
	TOTAL SALARIES / WAGES				13,416	
	Total Payroll Taxes				1,026	
	Total Workers' Compensation				83	
	Total Other Benefits				1,264	
	TOTAL EMPLOYEE BENEFITS				2,373	
	TOTAL PAID PERSONNEL				15,789	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
26				13	0	
27				13	0	
28				13	0	
29				13	0	
30				13	0	
31				13	0	
32				13	0	
33				13	0	
34				13	0	
35				13	0	
36				13	0	
37				13	0	
38				13	0	
39				13	0	
40				13	0	
	Total Salaries / Wages: Section B				0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				13	0	
42				13	0	
43				13	0	
44				13	0	
45				13	0	
46				13	0	
47				13	0	
48				13	0	
49				13	0	
50				13	0	
51				13	0	
52				13	0	
53				13	0	
54				13	0	
55				13	0	
56				13	0	
57				13	0	
58				13	0	
59				13	0	
60				13	0	
	Total Salaries / Wages: Section C				0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTO:

April 1, 2016 to June 30, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-FUND
1234567890

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				13	0	
2				13	0	
3				13	0	
4				13	0	
5				13	0	
6				13	0	
7				13	0	
8				13	0	
9				13	0	
10				13	0	
11				13	0	
12				13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				13	0	
27				13	0	
28				13	0	
29				13	0	
30				13	0	
31				13	0	
32				13	0	
33				13	0	
34				13	0	
35				13	0	
36				13	0	
37				13	0	
38				13	0	
39				13	0	
40				13	0	
41				13	0	
42				13	0	
43				13	0	
44				13	0	
45				13	0	
46				13	0	
47				13	0	
48				13	0	
49				13	0	
50				13	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				13	0	
52				13	0	
53				13	0	
54				13	0	
55				13	0	
56				13	0	
57				13	0	
58				13	0	
59				13	0	
60				13	0	
61				13	0	
62				13	0	
63				13	0	
64				13	0	
65				13	0	
66				13	0	
67				13	0	
68				13	0	
69				13	0	
70				13	0	
71				13	0	
72				13	0	
73				13	0	
74				13	0	
75				13	0	
Third-Party In-Kind Personnel: Section C					0	

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Resources
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
Revision:
OTO:

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

	DESCRIPTION OF REVENUE	FUNDING SOURCE	AMOUNT	
	RCOoA Award Amounts:			
11	Federal & State	HICAP-SHIP	43,996	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		43,996	OK
17	Program Income (May not be used for match):			
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
22	Match Cash (From non-Federal sources):			
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
29	Match Third-Party In-Kind:			
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		43,996	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	4,888	0
Minimum Required Match	Title IIIE	25%	14,665	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
Revision:
OTO:

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	31,148				31,148
12 Payroll Taxes	2,383				2,383
13 Workers' Compensation	193				193
14 Other Benefits	1,352				1,352
15 Total Paid Personnel	35,076	0	0		35,076
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	35,076	0	0	0	35,076
18 Travel & Training *	1,000				1,000
Equipment					
20 Expendable Equipment (unit cost of < \$500)					0
21 Non-Expendable Equipment (unit cost ≥ \$500)	6,000				6,000
22 Total Equipment	6,000	0	0	0	6,000
23 Catered Food					0
24 Raw Food					0
25 Consultants *					0
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *					0
29 Utilities *					0
30 Office Expense *					0
31 Vehicle Operations and Maintenance *	301				301
32 Outside Services *					0
33 Accounting *					0
34 Audit * **					0
35 Volunteer Expense *					0
36 Insurance *	869				869
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *	750				750
39 Total Other Direct Expenses	1,920	0	0	0	1,920
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	43,996	0	0	0	43,996

OK OK OK OK OK

* Requires explanation

** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:

- Program Costs cell D41 must equal Program Resources cell G36.
- Program Costs cell E41 must equal Program Resources cell G21.
- Program Costs cell F41 must equal Program Resources cell G28.
- Program Costs cell H41 must equal Program Resources cell G34.
- Program Costs cell I41 must equal Program Resources cell G16.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



RIVERSIDE COUNTY
OFFICE ON AGING



Riverside County Office on Aging
Contractor Budget: Explanations
Fiscal Year 2015-16

Original:
Revision:
OTO:

April 1, 2016 to June 30, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

Budget Line Items	Line #	Total RCOoA	Explanation
Travel & Training *	18	1,000	Reimburse staff and volunteers for personal car use at \$0.51 per mile
Consultants *	25	0	
Lease / Rent *	28	0	Copier/Printer lease
Utilities *	29	0	Telephone
Office Expense *	30	0	Various office supplies \$700 plus \$500 for postage and \$500 for printing of educational flyers
Vehicle Operations and Maintenance *	31	301	Maintenance for auto
Outside Services *	32	0	IT Support for computer issues needing resolving
Accounting *	33	0	
Audit * **	34	0	
Volunteer Expense *	35	0	To educate volunteers on program information and recognition
Insurance *	36	869	Allocation of General and Professional Insurance
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	750	Conferences and Meeting
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original: X
Revision:
OTD:

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	Program Assistant	20.00	16.00	13	4,160	
2	Benefit Counselor	20.00	16.00	13	4,160	
3	Volunteer Coordinator	20.00	20.00	13	5,200	
4	HICAP Program Director	14.00	45.67	13	8,312	
5	HICAP Legal Advisor	6.00	52.88	13	4,125	
6	CFO/President	2.90	60.82	13	2,293	
7	Director of Finance	2.90	35.00	13	1,320	
8	Executive Assistant	3.00	17.00	13	663	
9	Accounting Assistant/Office Manager	3.05	15.00	13	595	
10	Receptionist	1.76	14.00	13	320	
11				13	0	
12				13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
Total Salaries / Wages: Section A					31,148	
Total Salaries / Wages: Section B					0	See detail in Section B
Total Salaries / Wages: Section C					0	See detail in Section C
TOTAL SALARIES / WAGES					31,148	
Total Payroll Taxes					2,383	
Total Workers' Compensation					193	
Total Other Benefits					1,352	
TOTAL EMPLOYEE BENEFITS					3,928	
TOTAL PAID PERSONNEL					35,076	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
26				13	0	
27				13	0	
28				13	0	
29				13	0	
30				13	0	
31				13	0	
32				13	0	
33				13	0	
34				13	0	
35				13	0	
36				13	0	
37				13	0	
38				13	0	
39				13	0	
40				13	0	
Total Salaries / Wages: Section B					0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				13	0	
42				13	0	
43				13	0	
44				13	0	
45				13	0	
46				13	0	
47				13	0	
48				13	0	
49				13	0	
50				13	0	
51				13	0	
52				13	0	
53				13	0	
54				13	0	
55				13	0	
56				13	0	
57				13	0	
58				13	0	
59				13	0	
60				13	0	
Total Salaries / Wages: Section C					0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTO:

April 1, 2016 to June 30, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				13	0	
2				13	0	
3				13	0	
4				13	0	
5				13	0	
6				13	0	
7				13	0	
8				13	0	
9				13	0	
10				13	0	
11				13	0	
12				13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				52	0	
27				52	0	
28				52	0	
29				52	0	
30				52	0	
31				52	0	
32				52	0	
33				52	0	
34				52	0	
35				52	0	
36				52	0	
37				52	0	
38				52	0	
39				52	0	
40				52	0	
41				52	0	
42				52	0	
43				52	0	
44				52	0	
45				52	0	
46				52	0	
47				52	0	
48				52	0	
49				52	0	
50				52	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				52	0	
52				52	0	
53				52	0	
54				52	0	
55				52	0	
56				52	0	
57				52	0	
58				52	0	
59				52	0	
60				52	0	
61				52	0	
62				52	0	
63				52	0	
64				52	0	
65				52	0	
66				52	0	
67				52	0	
68				52	0	
69				52	0	
70				52	0	
71				52	0	
72				52	0	
73				52	0	
74				52	0	
75				52	0	
Third-Party In-Kind Personnel: Section C					0	

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
 Contractor Budget: Program Resources
 Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
 Revision:
 OTO:

Contractor: Council on Aging
 Program and Service: HICAP-Reimbursement
 Vendor #: 1234567890

Date: 09/02/2015

	DESCRIPTION OF REVENUE	FUNDING SOURCE	AMOUNT	
	RCOoA Award Amounts:			
11	Federal & State	HICAP-Reimbursement	47,675	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		47,675	OK
17	Program Income (May not be used for match):			
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
22	Match Cash (From non-Federal sources):			
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
29	Match Third-Party In-Kind:			
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		47,675	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	5,297	0
Minimum Required Match	Title IIIE	25%	15,892	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-Reimbursement
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	39,901				39,901
12 Payroll Taxes	3,052				3,052
13 Workers' Compensation	247				247
14 Other Benefits	3,739				3,739
15 Total Paid Personnel	46,939	0	0		46,939
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	46,939	0	0	0	46,939
18 Travel & Training *					0
Equipment					
20 Expendable Equipment (unit cost of < \$500)					0
21 Non-Expendable Equipment (unit cost ≥ \$500)					0
22 Total Equipment	0	0	0	0	0
23 Catered Food					0
24 Raw Food					0
25 Consultants *					0
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *					0
29 Utilities *					0
30 Office Expense *					0
31 Vehicle Operations and Maintenance *					0
32 Outside Services *					0
33 Accounting *					0
34 Audit * **					0
35 Volunteer Expense *					0
36 Insurance *					0
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *	736				736
39 Total Other Direct Expenses	736	0	0	0	736
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	47,675	0	0	0	47,675

OK OK OK OK OK

* Requires explanation
** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:
 Program Costs cell D41 must equal Program Resources cell G36.
 Program Costs cell E41 must equal Program Resources cell G21.
 Program Costs cell F41 must equal Program Resources cell G28.
 Program Costs cell H41 must equal Program Resources cell G34.
 Program Costs cell I41 must equal Program Resources cell G16.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.



RIVERSIDE COUNTY OFFICE ON AGING



ATTACHMENT "C"

Riverside County Office on Aging

Contractor Budget: Explanations

Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original: X
Revision:
OTO:

Contractor:

Council on Aging

Date:

09/02/2015

Program and Service:

HICAP-Reimbursement

Vendor #:

1234567890

Budget Line Items	Line #	Total RCOA	Explanation
Travel & Training *	18	0	
Consultants *	25	0	
Lease / Rent *	28	0	Office Lease at \$1.30 per sq ft at 1,654.6 sq ft
Utilities *	29	0	
Office Expense *	30	0	
Vehicle Operations and Maintenance *	31	0	
Outside Services *	32	0	IT Support for computer issues needing resolving
Accounting *	33	0	
Audit * **	34	0	
Volunteer Expense *	35	0	To educate volunteers on program information and recognition
Insurance *	36	0	
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	736	Copier/Printer Lease and maintenance expenses
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

April 1, 2016 to June 30, 2016

Original: X
Revision:
OTO:

Date: 09/02/2015

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-Reimbursement
1234567890

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	HICAP Benefit Counselor	10.00	18.00	13	2,340	
2	HICAP Program Manager	40.00	26.44	13	13,750	
3	Outreach Coordinator-Bilingual	20.00	17.00	13	4,420	
4	Call Center Specialist	20.00	14.00	13	3,640	
5	Benefits Specialist	20.00	18.00	13	4,680	
6	HICAP Regional Coordinator	17.90	19.00	13	4,421	
7	HICAP Director	3.21	30.40	13	1,269	
8	CEO/President	3.25	60.82	13	2,570	
9	Director of Finance	3.25	35.00	13	1,479	
10	Executive Assistant	3.25	17.00	13	718	
11	Accounting Assistant/Office Manager	3.15	15.00	13	614	
12	Receptionist		14.00	13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
Total Salaries / Wages: Section A					39,901	
Total Salaries / Wages: Section B					0	See detail in Section B
Total Salaries / Wages: Section C					0	See detail in Section C
TOTAL SALARIES / WAGES					39,901	
Total Payroll Taxes					3,052	
Total Workers' Compensation					247	
Total Other Benefits					3,739	
TOTAL EMPLOYEE BENEFITS					7,038	
TOTAL PAID PERSONNEL					46,939	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
26				13	0	
27				13	0	
28				13	0	
29				13	0	
30				13	0	
31				13	0	
32				13	0	
33				13	0	
34				13	0	
35				13	0	
36				13	0	
37				13	0	
38				13	0	
39				13	0	
40				13	0	
Total Salaries / Wages: Section B					0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				13	0	
42				13	0	
43				13	0	
44				13	0	
45				13	0	
46				13	0	
47				13	0	
48				13	0	
49				13	0	
50				13	0	
51				13	0	
52				13	0	
53				13	0	
54				13	0	
55				13	0	
56				13	0	
57				13	0	
58				13	0	
59				13	0	
60				13	0	
Total Salaries / Wages: Section C					0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTO:

April 1, 2016 to June 30, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-Reimbursement
1234567890

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				13	0	
2				13	0	
3				13	0	
4				13	0	
5				13	0	
6				13	0	
7				13	0	
8				13	0	
9				13	0	
10				13	0	
11				13	0	
12				13	0	
13				13	0	
14				13	0	
15				13	0	
16				13	0	
17				13	0	
18				13	0	
19				13	0	
20				13	0	
21				13	0	
22				13	0	
23				13	0	
24				13	0	
25				13	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				13	0	
27				13	0	
28				13	0	
29				13	0	
30				13	0	
31				13	0	
32				13	0	
33				13	0	
34				13	0	
35				13	0	
36				13	0	
37				13	0	
38				13	0	
39				13	0	
40				13	0	
41				13	0	
42				13	0	
43				13	0	
44				13	0	
45				13	0	
46				13	0	
47				13	0	
48				13	0	
49				13	0	
50				13	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				13	0	
52				13	0	
53				13	0	
54				13	0	
55				13	0	
56				13	0	
57				13	0	
58				13	0	
59				13	0	
60				13	0	
61				13	0	
62				13	0	
63				13	0	
64				13	0	
65				13	0	
66				13	0	
67				13	0	
68				13	0	
69				13	0	
70				13	0	
71				13	0	
72				13	0	
73				13	0	
74				13	0	
75				13	0	
Third-Party In-Kind Personnel: Section C					0	

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Resources
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-FUND
Vendor #: 1234567890

Date: 09/02/2015

	DESCRIPTION OF REVENUE	FUNDING SOURCE	AMOUNT	
	RCOoA Award Amounts:			
11	Federal & State	HICAP-FUND	71,504	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		71,504	OK
17	Program Income (May not be used for match):			
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
22	Match Cash (From non-Federal sources):			
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
29	Match Third-Party In-Kind:			
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		71,504	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	7,945	0
Minimum Required Match	Title IIIE	25%	23,835	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-FUND
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	39,518				39,518
12 Payroll Taxes	3,023				3,023
13 Workers' Compensation	245				245
14 Other Benefits	7,612				7,612
15 Total Paid Personnel	50,398	0	0		50,398
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	50,398	0	0	0	50,398
18 Travel & Training *					0
Equipment					
20 Expendable Equipment (unit cost of < \$500)					0
21 Non-Expendable Equipment (unit cost ≥ \$500)					0
22 Total Equipment	0	0	0	0	0
23 Catered Food					0
24 Raw Food					0
25 Consultants *	544				544
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *	19,360				19,360
29 Utilities *					0
30 Office Expense *					0
31 Vehicle Operations and Maintenance *					0
32 Outside Services *					0
33 Accounting *					0
34 Audit * **					0
35 Volunteer Expense *					0
36 Insurance *					0
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *	1,202				1,202
39 Total Other Direct Expenses	20,562	0	0	0	20,562
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	71,504	0	0	0	71,504

OK OK OK OK OK

* Requires explanation
** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:
 Program Costs cell D41 must equal Program Resources cell G36.
 Program Costs cell E41 must equal Program Resources cell G21.
 Program Costs cell F41 must equal Program Resources cell G28.
 Program Costs cell H41 must equal Program Resources cell G34.
 Program Costs cell I41 must equal Program Resources cell G16.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



RIVERSIDE COUNTY
OFFICE ON AGING



Riverside County Office on Aging
Contractor Budget: Explanations
Fiscal Year 2015-16

Original:
Revision:
OTO:

July 1, 2015 to March 31, 2016

Contractor: Council on Aging
Program and Service: HICAP-FUND
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Line #	Total RCOoA	Explanation
Travel & Training *	18	0	
Consultants *	25	544	IT Support Allocation
Lease / Rent *	28	19,360	Office Lease
Utilities *	29	0	
Office Expense *	30	0	
Vehicle Operations and Maintenance *	31	0	
Outside Services *	32	0	
Accounting *	33	0	
Audit * **	34	0	
Volunteer Expense *	35	0	
Insurance *	36	0	
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	1,202	Advertising in local newspaper/radio/TV
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original: X
Revision:
OTO:

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-FUND
1234567890

Date: 09/02/2015

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	HICAP Benefit Counselor	13.33	18.00	39	9,360	
2	Benefits Specialist	20.00	17.00	39	13,260	
3	HICAP Program Manager	10.00	26.44	39	10,312	
4	Admin-CEO/President	1.20	80.82	39	2,846	
5	Admin-Director of Finance	1.30	35.00	39	1,775	
6	Admin-Executive Assistant	1.30	17.00	39	862	
7	Admin-Accounting Asst/Ofc Mgr	1.30	15.00	39	761	
8	Admin-Receptionist	0.63	14.00	39	342	
9				39	0	
10				39	0	
11				39	0	
12				39	0	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
Total Salaries / Wages: Section A					39,518	
Total Salaries / Wages: Section B					0	See detail in Section B
Total Salaries / Wages: Section C					0	See detail in Section C
TOTAL SALARIES / WAGES					39,518	
Total Payroll Taxes					3,023	
Total Workers' Compensation					245	
Total Other Benefits					7,612	
TOTAL EMPLOYEE BENEFITS					10,880	
TOTAL PAID PERSONNEL					50,398	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
Total Salaries / Wages: Section B					0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
Total Salaries / Wages: Section C					0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTO:

July 1, 2015 to March 31, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-FUND
1234567890

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				39	0	
2				39	0	
3				39	0	
4				39	0	
5				39	0	
6				39	0	
7				39	0	
8				39	0	
9				39	0	
10				39	0	
11				39	0	
12				39	0	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
61				39	0	
62				39	0	
63				39	0	
64				39	0	
65				39	0	
66				39	0	
67				39	0	
68				39	0	
69				39	0	
70				39	0	
71				39	0	
72				39	0	
73				39	0	
74				39	0	
75				39	0	
Third-Party In-Kind Personnel: Section C					0	

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Resources
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-SHIP
Vendor #: 1234567890

Date: 09/02/2015

	DESCRIPTION OF REVENUE	FUNDING SOURCE	AMOUNT	
	RCOoA Award Amounts:			
11	Federal & State	HICAP-SHIP	133,301	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		133,301	OK
17	Program Income (May not be used for match):			
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
22	Match Cash (From non-Federal sources):			
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
29	Match Third-Party In-Kind:			
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		133,301	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	14,811	0
Minimum Required Match	Title IIIE	25%	44,434	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-SHIP
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	69,886				69,886
12 Payroll Taxes	5,346				5,346
13 Workers' Compensation	433				433
14 Other Benefits	2,060				2,060
15 Total Paid Personnel	77,725	0	0		77,725
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	77,725	0	0	0	77,725
18 Travel & Training *	13,500				13,500
Equipment					
20 Expendable Equipment (unit cost of < \$500)	2,500				2,500
21 Non-Expendable Equipment (unit cost ≥ \$500)	17,500				17,500
22 Total Equipment	20,000	0	0	0	20,000
23 Catered Food					0
24 Raw Food					0
25 Consultants *					0
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *					0
29 Utilities *	5,000				5,000
30 Office Expense *	3,400				3,400
31 Vehicle Operations and Maintenance *	1,000				1,000
32 Outside Services *					0
33 Accounting *					0
34 Audit * **					0
35 Volunteer Expense *	1,800				1,800
36 Insurance *	2,608				2,608
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *	8,268				8,268
39 Total Other Direct Expenses	22,076	0	0	0	22,076
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	133,301	0	0	0	133,301

OK OK OK OK OK

* Requires explanation
** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:
 Program Costs cell D41 must equal Program Resources cell G36.
 Program Costs cell E41 must equal Program Resources cell G21.
 Program Costs cell F41 must equal Program Resources cell G28.
 Program Costs cell H41 must equal Program Resources cell G34.
 Program Costs cell I41 must equal Program Resources cell G16.
 Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTO:

July 1, 2015 to March 31, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-SHIP
1234567890

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				39	0	
2				39	0	
3				39	0	
4				39	0	
5				39	0	
6				39	0	
7				39	0	
8				39	0	
9				39	0	
10				39	0	
11				39	0	
12				39	0	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
61				39	0	
62				39	0	
63				39	0	
64				39	0	
65				39	0	
66				39	0	
67				39	0	
68				39	0	
69				39	0	
70				39	0	
71				39	0	
72				39	0	
73				39	0	
74				39	0	
75				39	0	
Third-Party In-Kind Personnel: Section C					0	



ATTACHMENT "C"

RIVERSIDE COUNTY
OFFICE ON AGING



Riverside County Office on Aging
Contractor Budget: Explanations
Fiscal Year 2015-16

Original: X
Revision:
OTO:

July 1, 2015 to March 31, 2016

Date: 09/02/2015

Council on Aging
HICAP-SHIP
1234567890

Contractor:
Program and Service:
Vendor #:

Budget Line Items	Line #	Total RCOoA	Explanation
Travel & Training *	18	13,500	\$2,505 for Sacramento HICAP meeting, \$500 for staff development & \$10,495 for Reimburse staff and volunteers for personal car use at \$0.51 per mile
Consultants *	25	0	
Lease / Rent *	28	0	
Utilities *	29	5,000	Telephone
Office Expense *	30	3,400	Various office supplies \$1,400 plus \$2,000 for postage
Vehicle Operations and Maintenance *	31	1,000	Maintenance for auto
Outside Services *	32	0	
Accounting *	33	0	
Audit * **	34	0	
Volunteer Expense *	35	1,800	To educate volunteers on program information and recognition
Insurance *	36	2,608	Allocation of General and Professional Insurance
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	8,268	Advertising \$5,968 and Conferences \$2,300
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original: X
Revision:
OTO:

Date: 09/02/2015

Contractor: Council on Aging
Program and Service: HICAP-SHIP
Vendor #: 1234567890

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	Data Intake Specialist	20.00	14.00	39	10,920	
2	Education/Outreach Specialist	20.00	20.00	39	15,600	
3	Volunteer Coordinator	12.00	20.00	39	9,360	
4	Program Assistant	16.00	16.00	39	9,984	
5	HICAP Legal Advisor	6.00	52.88	39	12,374	
6	CEO/President	2.20	60.82	39	5,218	
7	Director of Finance	2.20	35.00	39	3,003	
8	Executive Assistant	2.20	17.00	39	1,459	
9	Accounting Assistant/Office Manager	2.20	15.00	39	1,287	
10	Receptionist	1.25	14.00	39	681	
11				39	0	
12				39	0	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
Total Salaries / Wages: Section A					69,886	
Total Salaries / Wages: Section B					0	See detail in Section B
Total Salaries / Wages: Section C					0	See detail in Section C
TOTAL SALARIES / WAGES					69,886	
Total Payroll Taxes					5,346	
Total Workers' Compensation					433	
Total Other Benefits					2,060	
TOTAL EMPLOYEE BENEFITS					7,839	
TOTAL PAID PERSONNEL					77,725	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
Total Salaries / Wages: Section B					0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
Total Salaries / Wages: Section C					0	

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Resources
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-Reimbursement
Vendor #: 1234567890

Date: 09/02/2015

DESCRIPTION OF REVENUE		FUNDING SOURCE	AMOUNT	
RCOoA Award Amounts:				
11	Federal & State	HICAP-Reimbursement	143,044	
12	Federal & State OTO			
13	Other Award (IFS *)			
14	Other Award (IFS *)			
15	Other Award (IFS *)			
16	Total RCOoA Award Amounts		143,044	OK
Program Income (May not be used for match):				
18	Donations from Program Participants			
19	Other Program Income (IFS *)			
20	Other Program Income (IFS *)			
21	Total Program Income (May not be used for match)		0	OK
Match Cash (From non-Federal sources):				
23	Donations NOT from Program Participants			
24	Fundraising Events			
25	Proceeds from Sale of Property / Equipment			
26	Service Fees Income (Non-RCOoA units)			
27	Other Match Cash (IFS *)			
28	Total Match Cash		0	OK
Match Third-Party In-Kind:				
30	Volunteer Services			
31	Donated Materials / Space			
32	Other Match Third-Party In-Kind (IFS *)			
33	Other Match Third-Party In-Kind (IFS *)			
34	Total Match Third-Party In-Kind		0	OK
36	Total Program Resources		143,044	OK

Match Reference		Rate	Minimum	Reported
Minimum Required Match	Title IIIB, IIIC	10%	15,894	0
Minimum Required Match	Title IIIE	25%	47,681	0

* IFS = Include Funding Source

Program Resources amounts (this worksheet) must equal Program Costs amounts (separate worksheet) as follows:

- Program Resources cell G16 must equal Program Costs cell I41.
- Program Resources cell G21 must equal Program Costs cell E41.
- Program Resources cell G28 must equal Program Costs cell F41.
- Program Resources cell G34 must equal Program Costs cell H41.
- Program Resources cell G36 must equal Program Costs cell D41.

Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Program Costs
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original:
Revision:
OTO:

Contractor: Council on Aging
Program and Service: HICAP-Reimbursement
Vendor #: 1234567890

Date: 09/02/2015

Budget Line Items	Total Cost	Program Inc	Cash Match	In-Kind Match	Total RCOoA
Paid Personnel					
11 Total Salaries / Wages	117,589				117,589
12 Payroll Taxes	8,996				8,996
13 Workers' Compensation	729				729
14 Other Benefits	13,003				13,003
15 Total Paid Personnel	140,317	0	0		140,317
16 Third-Party In-Kind Personnel	0				0
17 Total Personnel	140,317	0	0	0	140,317
18 Travel & Training *					0
Equipment					
20 Expendable Equipment (unit cost of < \$500)					0
21 Non-Expendable Equipment (unit cost ≥ \$500)					0
22 Total Equipment	0	0	0	0	0
23 Catered Food					0
24 Raw Food					0
25 Consultants *	405				405
Other Direct Expenses					
Building Rent and Utilities					
28 Lease / Rent *					0
29 Utilities *					0
30 Office Expense *					0
31 Vehicle Operations and Maintenance *					0
32 Outside Services *					0
33 Accounting *					0
34 Audit * **	2,322				2,322
35 Volunteer Expense *					0
36 Insurance *					0
37 Subcontracted Direct Service Costs *					0
38 Miscellaneous *					0
39 Total Other Direct Expenses	2,322	0	0	0	2,322
40 Indirect Costs (Maximum 9% of Total) *					0
41 Total Program Costs	143,044	0	0	0	143,044

OK OK OK OK OK

* Requires explanation
** Cannot include audit cost unless \$500,000 in Federal Awards is expended annually

Program Costs amounts (this worksheet) must equal Program Resources amounts (separate worksheet) as follows:
 Program Costs cell D41 must equal Program Resources cell G36.
 Program Costs cell E41 must equal Program Resources cell G21.
 Program Costs cell F41 must equal Program Resources cell G28.
 Program Costs cell H41 must equal Program Resources cell G34.
 Program Costs cell I41 must equal Program Resources cell G16.
 Note that corresponding amounts correctly reported will be noted by "OK", and "ERRORS" denote adjustments needed.

ATTACHMENT "C"



RIVERSIDE COUNTY
OFFICE ON AGING



Riverside County Office on Aging
Contractor Budget: Explanations
Fiscal Year 2015-16

Original:
Revision:
OTO:

July 1, 2015 to March 31, 2016

Date: 09/02/2015

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-Reimbursement
1234567890

Budget Line Items	Line #	Total RCOoA	Explanation
Travel & Training *	18	0	
Consultants *	25	405	IT Support
Lease / Rent *	28	0	
Utilities *	29	0	
Office Expense *	30	0	
Vehicle Operations and Maintenance *	31	0	
Outside Services *	32	0	
Accounting *	33	0	
Audit * **	34	2,322	Financial Audit and tax return
Volunteer Expense *	35	0	
Insurance *	36	0	
Subcontracted Direct Service Costs *	37	0	
Miscellaneous *	38	0	
Indirect Costs (Maximum 9% of Total) *	40	0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: Paid Personnel
Fiscal Year 2015-16

July 1, 2015 to March 31, 2016

Original: X
Revision:
OTO:

Date: 09/02/2015

Contractor: Council on Aging
Program and Service: HICAP-Reimbursement
Vendor #: 1234567890

PAID PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1	HICAP Benefit Counselor	20.00	18.00	39	14,040	
2	HICAP Program Manager	30.00	26.44	39	30,938	
3	Outreach Coordinator-Bilingual	16.00	17.00	39	10,608	
4	Call Center Specialist	20.00	14.00	39	10,920	
5	Benefits Specialist	20.00	18.00	39	14,040	
6	HICAP Regional Coordinator	20.00	19.00	39	14,820	
7	HICAP Director	2.00	33.65	39	2,625	
8	CEO/President	3.68	60.82	39	8,717	
9	Director of Finance	3.70	35.00	39	5,051	
10	Executive Assistant	3.70	17.00	39	2,453	
11	Accounting Assistant/Office Manager	3.70	15.00	39	2,165	
12	Receptionist	2.22	14.00	39	1,212	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
Total Salaries / Wages: Section A					117,589	
Total Salaries / Wages: Section B					0	See detail in Section B
Total Salaries / Wages: Section C					0	See detail in Section C
TOTAL SALARIES / WAGES					117,589	
Total Payroll Taxes					8,996	
Total Workers' Compensation					729	
Total Other Benefits					13,003	
TOTAL EMPLOYEE BENEFITS					22,728	
TOTAL PAID PERSONNEL					140,317	

PAID PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
Total Salaries / Wages: Section B					0	

PAID PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
Total Salaries / Wages: Section C					0	



**RIVERSIDE COUNTY
OFFICE ON AGING**



Riverside County Office on Aging
Contractor Budget: In-Kind Personnel
Fiscal Year 2015-16

Original: X
Revision:
OTG:

July 1, 2015 to March 31, 2016

Contractor:
Program and Service:
Vendor #:

Council on Aging
HICAP-Reimbursement
1234567800

Date: 09/02/2015

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION A						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
1				39	0	
2				39	0	
3				39	0	
4				39	0	
5				39	0	
6				39	0	
7				39	0	
8				39	0	
9				39	0	
10				39	0	
11				39	0	
12				39	0	
13				39	0	
14				39	0	
15				39	0	
16				39	0	
17				39	0	
18				39	0	
19				39	0	
20				39	0	
21				39	0	
22				39	0	
23				39	0	
24				39	0	
25				39	0	
Third-Party In-Kind Personnel: Section A					0	
Third-Party In-Kind Personnel: Section B					0	See detail in Section B
Third-Party In-Kind Personnel: Section C					0	See detail in Section C
TOTAL THIRD-PARTY IN-KIND PERSONNEL					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION B						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
26				39	0	
27				39	0	
28				39	0	
29				39	0	
30				39	0	
31				39	0	
32				39	0	
33				39	0	
34				39	0	
35				39	0	
36				39	0	
37				39	0	
38				39	0	
39				39	0	
40				39	0	
41				39	0	
42				39	0	
43				39	0	
44				39	0	
45				39	0	
46				39	0	
47				39	0	
48				39	0	
49				39	0	
50				39	0	
Third-Party In-Kind Personnel: Section B					0	

THIRD-PARTY IN-KIND PERSONNEL BY POSITION - SECTION C						
#	Position / Title	Hours per Week	Hourly Rate	Contract # of Weeks	Contract Budget	Comments / Notes
51				39	0	
52				39	0	
53				39	0	
54				39	0	
55				39	0	
56				39	0	
57				39	0	
58				39	0	
59				39	0	
60				39	0	
61				39	0	
62				39	0	
63				39	0	
64				39	0	
65				39	0	
66				39	0	
67				39	0	
68				39	0	
69				39	0	
70				39	0	
71				39	0	
72				39	0	
73				39	0	
74				39	0	
75				39	0	
Third-Party In-Kind Personnel: Section C					0	

**CERTIFICATE OF
INSURANCE**



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/17/2014

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.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must 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).

PRODUCER Milestone Risk Management & Insurance Agency License No. 0B72766 8 Corporate Park, Suite 130 Irvine CA 92606	CONTACT NAME: Teresa Shen PHONE (A/C No. Ext): (949) 852-0909 FAX (A/C No): (949) 852-1131 E-MAIL ADDRESS: tshen@milestonepromise.com														
	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Technology Insurance Co</td> <td>42376</td> </tr> <tr> <td>INSURER B: Scottsdale Indemnity Co.</td> <td>15580</td> </tr> <tr> <td>INSURER C: Axis Insurance Co.</td> <td>37273</td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Technology Insurance Co	42376	INSURER B: Scottsdale Indemnity Co.	15580	INSURER C: Axis Insurance Co.	37273	INSURER D:		INSURER E:		INSURER F:
INSURER(S) AFFORDING COVERAGE	NAIC #														
INSURER A: Technology Insurance Co	42376														
INSURER B: Scottsdale Indemnity Co.	15580														
INSURER C: Axis Insurance Co.	37273														
INSURER D:															
INSURER E:															
INSURER F:															
INSURED Council on Aging of Orange County 1971 E 4th St, Ste 200 Santa Ana CA 92705															


COVERAGES CERTIFICATE NUMBER: 15/16 Master REVISION NUMBER:

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.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	TWC3452204	1/1/2015	1/1/2016	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	D&O / Emp Practices Liab			EKI3142145	11/13/2014	11/2/2015	Limit \$1,000,000
C	E&O / Media Liability			MCN000080281401	11/2/2014	11/2/2015	Limit \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER **CANCELLATION**

County of Riverside 4080 Lemon St. Riverside, CA 92501	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 Teresa Shen/TERESA 
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CERTIFICATE OF LIABILITY INSURANCE

Date

6/25/2014

Producer

MANION/BELL INSURANCE ASSOCIATES
 P. O. BOX 36186
 LOS ANGELES, CA. 90036
 (213) 387-8294* FAX (213) 389-5833

LIC. # 0655274

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW

COMPANIES AFFORDING COVERAGES

Company
 A Nonprofits' Ins. Alliance of Calif.(NIAC) Best: A Rated
 Company
 B United States Fire Ins. Co.(USFIC) Best: A Rated
 Company
 C
 Company
 D

Insured

Council on Aging of Orange County
 1971 E. 4th Street, Ste. 200
 Santa Ana, CA 92705

COVERAGES

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 THEIR TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS

CO	LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM,DD,YY)	POLICY EXPIRATION DATE (MM,DD,YY)	LIMITS	
COMM. GENERAL LIABILITY						GENERAL AGGREGATE	\$2,000,000
A	X	OCCURRENCE FORM	2014 09600 NPO	7/1/2014	7/1/2015	PROFESSIONAL LIABILITY AGG.	\$2,000,000
		OTHER				PRODUCTS* COMP/OP AGG	\$1,000,000
	X	SEXUAL MISCONDUCT(1M AGG)				PERSONAL & ADV INJURY	\$1,000,000
	X	PROFESSIONAL LIABILITY				EACH OCCURRENCE	\$1,000,000
						FIRE DAMAGE(Any one fire)	\$500,000
AUTOMOBILE LIABILITY						MED EXP(Any one person)*	\$20,000
A		ANY AUTO					
		ALL OWNED AUTOS				COMBINED SINGLE LIMIT	\$1,000,000
	X	SCHEDULED AUTOS	2014 22727 NPO	7/1/2014	7/1/2015	BODILY INJURY	
	X	HIRED AUTOS				(Per person)	
	X	NON-OWNED AUTOS				BODILY INJURY	
	X	\$ 250. DED. ON COMP/COLL				(Per accident)	
						PROPERTY DAMAGE	
EXCESS LIABILITY							
A	X	UMBRELLA FORM	2014 22727 UMB	7/1/2014	7/1/2015	EACH OCCURRENCE	\$2,000,000
		OTHER THAN UMBRELLA FORM				AGGREGATE	\$2,000,000
VOLUNTEER ACCIDENT						RETENTION	\$10,000
B	X	PRIMARY	US 192BD	7/1/2014	7/1/2015	ACCIDENT LIMIT	\$10,000
		EXCESS				AD&D	\$5,000
		DEDUCTIBLE				DEDUCTIBLE	\$0
OTHER							

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/SPECIAL ITEMS

RE: Health Insurance Counseling & Advocacy Program (HICAP) – FT 2013-14
 The County of Riverside, The Department of Aging, State of California, its officers, agents, employees, and servants are included as Additional insureds, with respect to work performed for the State of California under this agreement

CERTIFICATE HOLDER & ADDITIONAL INSURED

County of Riverside
 6296 River Crest DR # K
 Riverside, CA 92507

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS 30 DAYS NOTICE OF CANCELLATION, EXCEPT 10 DAYS NON-PAYMENT OF PREMIUM
 AUTHORIZED REPRESENTATIVE

Glory Manion

213 387 8294

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – DESIGNATED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s)

Any person or organization that you are required to add as an additional insured on this policy, under a written contract or agreement currently in effect, or becoming effective during the term of this policy. The additional insured status will not be afforded with respect to liability arising out of or related to your activities as a real estate manager for that person or organization.

County of Riverside, the Department of Aging, the State of California, its officers,
agents, employees, and servants

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

Section II – Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf.

- A. In the performance of your ongoing operations; or
- B. In connection with your premises owned by or rented to you.

**BOARD RESOLUTION
STATEMENT AND
SIGNATURES**



Promoting the independence, health and dignity of older adults through compassion, education and advocacy

**ACTION BY WRITTEN CONSENT
BY THE BOARD OF DIRECTORS OF
THE COUNCIL ON AGING – ORANGE COUNTY**

The undersigned, being the Executive Committee of the directors of THE COUNCIL ON AGING – ORANGE COUNTY (the “COUNCIL”), do hereby consent in writing as of July 21, 2014 to the following actions by the Board of Directors (the “Board”):

WHEREAS, the Board has determined that it is in the best interested of the Chief Executive Officer/President of the Council, Lisa Wright Jenkins, be permitted to manage, in an expeditious manner, the day to day business activities of the Council including payment of any and all proper claims and other obligations from vendors and creditors in the form of the issuance of checks and/or various methods of electronic payment and to sign contracts on behalf of the Council;

WHEREAS, this Board has previously reviewed procedures for contracting, hiring, purchasing, and disbursing policies that implement effective internal controls that are reviewed by independent, third party auditors; and

WHEREAS, in order to expedite the payment of claims and other obligations, this Board hereby finds, determines and declares that it is necessary and proper to establish a procedure for the approval of checks and contracts of the Council;

NOW, THEREFORE, BE IT RESOLVED: That this Board hereby finds and determines that beginning July 1, 2014 for the fiscal year thereafter, the following are authorized signatories to issue checks in payment of claims or other obligations of the Council.

Lisa Wright Jenkins
Daryl YeeLitt
Michael Bader
Maria Arakaki
Ken Cornelison


Chief Executive Officer/President
Board Chair & 1st Vice President
2nd Corporate Vice President & Board Vice Chair
Treasurer
Secretary

FURTHER RESOLVED: That any authorized signer shall have a signature limit of \$10,000 on any single payment transactions;

FURTHER RESOLVED: Any payment transactions that exceed \$10,000 must be co-signed by an authorized individual.

This Written Consent shall be filed in the minute book of the Council and become a part of the records of the Council.

IN WITNESS WHEREOF, the undersigned have executed this Written Consent as of the date first written above.



Daryl YeeLitt



Michael Bader



Maria Arakaki



Ken Cornelison



Lisa Wright Jenkins

ORGANIZATIONAL CHART

THE HISTORY OF THE

REIGN OF

GEORGE III.

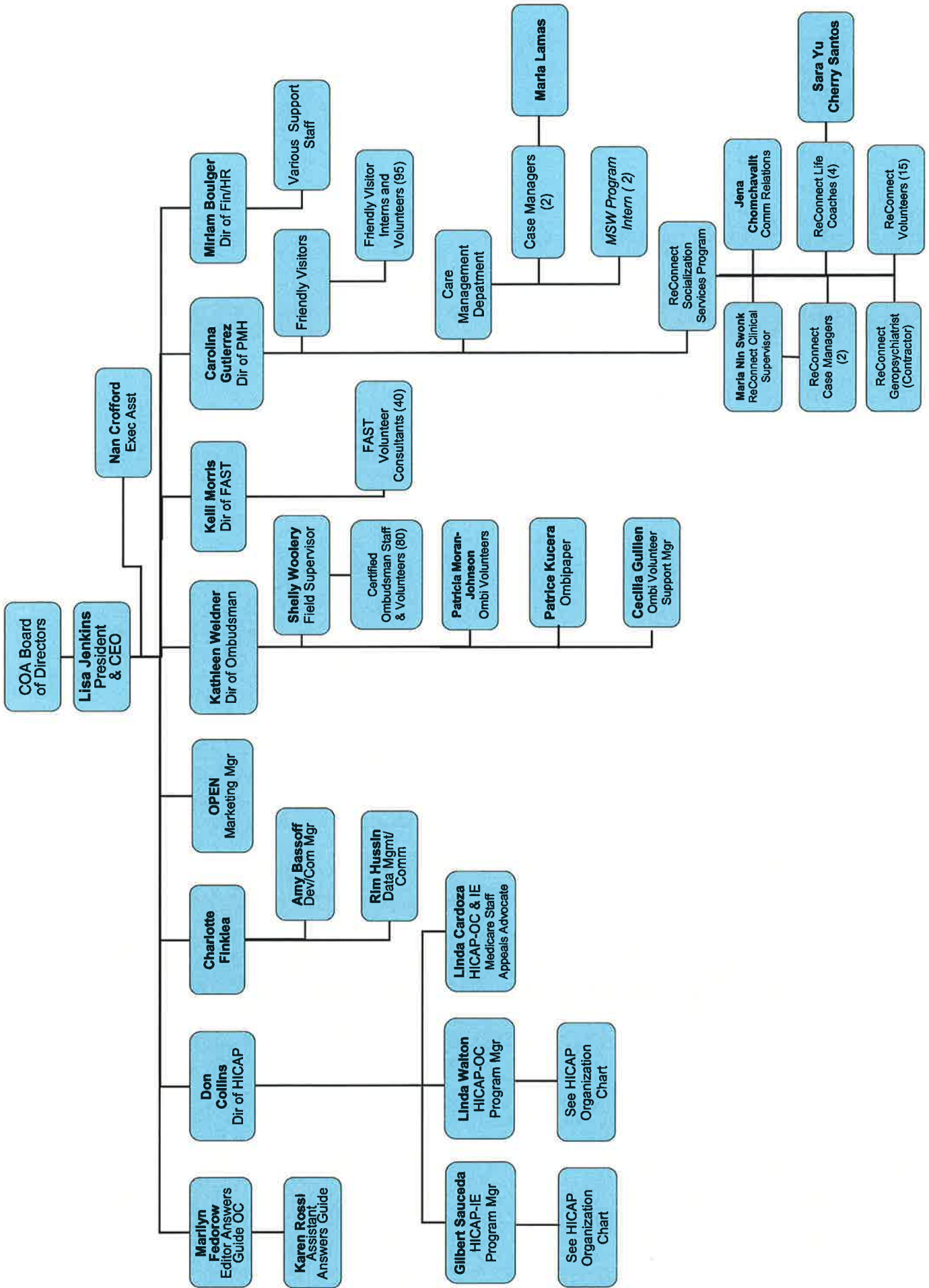
BY

JOHN BAKER, ESQ.

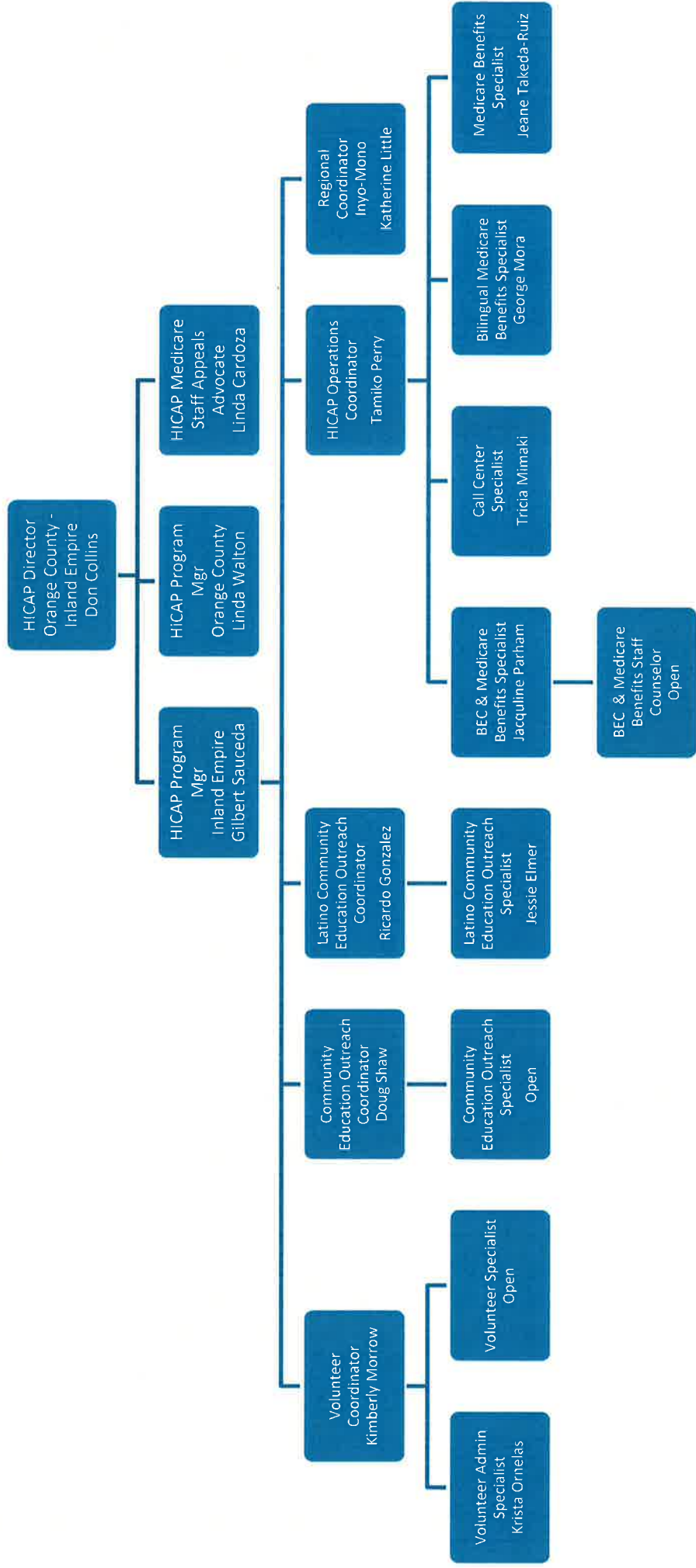
OF THE MIDDLE TEMPLE, ESQ.

IN SEVEN VOLUMES.

LONDON, Printed by J. BARNARD, at the Crown and Anchor, in St. Dunstons Church-yard, in the Year 1770.



HICAP Inland Empire Organizational Structure



ATTACHMENT E

COMMUNITY FOCAL POINT LIST

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ATTACHMENT "E"

FOCAL POINTS

COMMUNITY FOCAL POINTS LIST

Designated Community Focal Point	Address
Ageless Reflections – Blythe Community Center	445 North Broadway Blythe, CA 92225
Albert A. Chatigny Senior Community Recreation Center	1310 Oak Valley Parkway Beaumont, CA 92223
Arlanza Community Center – Bryant Park	7950 Philbin Avenue Riverside, CA 92503
Banning Senior Center	769 North San Gorgonio Avenue PO Box 998 Banning, CA 92220
Cathedral Center	37-171 West Buddy Rogers Avenue Cathedral City, CA 92234
Coachella Senior Center	1540 Seventh Street Coachella, CA 92236
Colorado River Senior Community Center	HCR 20, Box 3408 – Rio Loco Blythe, CA 92225
Corona Senior Center	921 South Belle Street Corona, CA 92882
Dales Senior Center	3936 Chestnut Street Riverside, CA 92501
Desert Hot Springs Senior Center	11-777 West Drive Desert Hot Springs, CA 92240
Eddie Dee Smith Senior Center	5888 Mission Boulevard Rubidoux, CA 92509
Idyllwild Town Hall	25925 Cedar Street Idyllwild, CA 92549
Indio Senior Center	45-700 Aladdin Street Indio, CA 92201
James A. Venable Community Center	50-390 Carmen Avenue Cabazon, CA 92230
James Simpson Memorial Center	305 East Devonshire Avenue Hemet, CA 92543
Janet Goeske Center	5257 Sierra Street Riverside, CA 92504
Jerry Rummonds Senior Center	87-225 Church Street PO Box 701 Thermal, CA 92274
Joslyn Senior Center	73-750 Catalina Way Palm Desert, CA 92260
Kay Cenicerros Senior Center	29995 Evans Road Sun City, CA 92586

ATTACHMENT "E"

FOCAL POINTS

COMMUNITY FOCAL POINTS LIST

Designated Community Focal Point	Address
La Quinta Senior Center	78-450 Avenida La Fonda La Quinta, CA 92247
La Sierra Senior Center	5215 La Sierra Riverside, CA 92505
Lake Elsinore Activity Center	420 East Lakeshore Drive Lake Elsinore, CA 92530
Marion Ashley Community Center	25625 Briggs Road Menifee, CA 92585
Mary Phillips Senior Center	41845 Sixth Street Temecula, CA 92590
Mead Valley Community Center	21091 Rider Street Perris, CA 92570
Mizell Senior Center	480 South Sunrise Way Palm Springs, CA 92262
Moreno Valley Senior Center	25075 Fir Avenue Moreno Valley, CA 92553
Murrieta Senior Center	41717 Juniper Street Murrieta, CA 92562
Norco Senior Center	2690 Clark Avenue PO Box 428 Norco, CA 92860
Norton Younglove Community Center	459 West Center Street Riverside, CA 92507
Norton Younglove Community Center	908 Park Street PO Box 1190 Calimesa, CA 92320
Perris Senior Center	100 North "D" Street Perris, CA 92570
Riverside-San Bernardino County Indian Health	11555 ½ Potrero Road Banning, CA 92220
Ruth H. Lewis Community Center at Reid Park	701 North Orange Street Riverside, CA 92501
San Jacinto Community Center	625 South Pico Avenue San Jacinto, CA 92583
Stratton Community Center at Bordwell Park	2008 Martin Luther King Boulevard Riverside, CA 92507
The Center	611 S. Palm Canyon Drive, Suite 201 Palm Springs, CA 92262
Ysamel Villegas Community Center	3091 Esperanza Street Riverside, CA 92503