



## **REQUEST FOR PROPOSAL (RFP) OAA Title IIIB Transportation**

**Issued by:** Jayhawk Area Agency on Aging, Inc. (JAAA)

**RFP Release Date: February 3, 2026**

**Pre Bid Meeting: February 11, 2026, 9:00am, Central Standard  
Time**

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/85612730337>**

**Deadline to Submit Questions: February 17, 2026, 12:00 noon,  
Central Standard Time**

**Responses to questions will be posted on February 23, 2026**

**Proposal Due Date: March 13, 2026, 12:00 noon, Central  
Standard Time**

**Contract Period: October 1, 2026 – September 30, 2027**

## Jayhawk Area Agency on Aging, Inc. Standard Terms and Conditions

### 1. Terminology / Definitions

Whenever the following words and expressions appear in this solicitation or any amendment thereto, the definition below applies:

- **Agency / Department:** Jayhawk Area Agency on Aging, Inc., the entity purchasing equipment, supplies, and/or services.
- **Amendment:** A written, official modification to a solicitation or contract.
- **Attachment:** Forms included with a solicitation that provide informational data or requirements related to performance.
- **Bidder:** A person or organization submitting a proposal/bid to provide equipment, supplies, or services.
- **Buyer:** The contact person referenced in the solicitation.
- **Client Registration:** The process of verifying client eligibility through the Uniform Program Registration (UPR), documenting required client information, authorizing transportation services, and maintaining records necessary for service delivery and reporting in accordance with KDADS Field Support Manual and Agency requirements.
- **Contract:** A legal, binding agreement between parties for procurement of equipment, supplies, or services.
- **Contractor:** A successful bidder who enters into a contract.
- **Exhibit:** Forms included with a bid/proposal that must be completed and returned.
- **Request for Proposal (RFP):** Procurement document issued by the Agency. Includes these Terms and Conditions, Pricing Pages, Exhibits, Attachments, and Amendments.
- **May:** Optional features, components, or action.
- **Must / Shall:** Mandatory requirement; non-compliance renders bid non-responsive.
- **Should:** Desirable but not mandatory features, components, or action.

### 2. Open Competition

- Bidders must submit questions or requests for clarification in writing to the Buyer by the deadline specified.
- Official Agency positions are only those stated in writing in the solicitation or amendments.
- Agency monitors procurement for anti-competitive behavior and may refer violations to the Kansas Attorney General.
- Agency reserves the right to modify or cancel a solicitation via amendment.

### 3. Preparation of Bid / Proposal

- Bidders must examine the entire solicitation carefully.
- Specifications are minimum requirements; bids must meet or exceed them.
- Firm fixed prices shall include all costs associated with client eligibility verification/UPR, scheduling, dispatch, driver time, mileage, vehicle costs, and reporting, unless otherwise specified in this RFP.
- Proposed costs must reflect the total funding requested and shall remain unchanged throughout the proposal evaluation period.

#### **4. Submission of Bids / Proposals**

- Bids must be signed by an authorized representative; include all required information and be submitted by the official closing date/time.
- Proposals must be submitted electronically in Word or PDF format to [reporting@jhawkaaa.org](mailto:reporting@jhawkaaa.org) no later than 12:00 p.m. (noon) Central Standard Time on March 13, 2026. Late submissions or proposals sent by any other method will not be accepted or considered.
- Modifications or withdrawals must be in writing or in person with proper identification before the proposal's due date.

#### **5. Evaluation / Award**

- Bids are evaluated based on compliance with specifications, price, responsiveness, and other stated criteria.
- Agency may request clarification, consider references or other sources, and award by item, group, or entirety.
- Unit price prevails over extended totals in case of discrepancy.
- Awards are made by written notification.
- All submitted bids are subject to Kansas open records law.

#### **6. Contract / Purchase Order**

- Contract includes the solicitation, bidder response, and Agency acceptance.
- Any modifications must be executed via formal amendment.

#### **7. Invoicing and Payment**

- Contractor must submit accurate monthly reports as required.
- Payments will be made on a reimbursement basis and must correspond to the number of eligible service units (one-way trips) as reported. No advance payments will be issued.
- Services provided in excess of authorized quantities or not in accordance with contract requirements will not be reimbursed.

#### **8. Delivery**

- Time is of the essence. All required deliverables, including completion of Uniform Program Registration, transportation service, and submission of required reports, must be completed by the dates specified in the contract and/or within the timeframes established by the KDADS Field Support Manual (FSM), or within a period otherwise deemed reasonable by the Agency.

#### **9. Inspection and Acceptance**

- The Agency reserves the right to monitor, review, and inspect all services provided under this RFP, including Uniform Program Registration, transportation service, and reporting, to ensure compliance with program requirements and contract specifications.
- Transportation services that do not meet the requirements, service delivery standards, or reporting obligations, may be rejected and will not be reimbursed.
- Rejection of non-compliant services does not limit the Agency's right to pursue other legal or contractual remedies.

#### **10. Warranty or Services**

The Contractor warrants that all services provided under this RFP, including completion of Uniform Program Registration, transportation service, and reporting, will:

- Conform to all specifications and requirements outlined in this RFP and the resulting contract.
- Be appropriate and safe for the intended recipients, meeting all transportation program standards.
- Be performed with high-quality standards and professional care, ensuring accuracy, timeliness, and reliability.

- Be free from defects or deficiencies in service delivery, documentation, or reporting.

#### **11. Conflict of Interest**

- The Contractor hereby covenants that, at the time of submission of this proposal, it has no contractual relationships or other obligations that would create an actual, perceived, or potential conflict of interest with the provision of transportation services, completion of Uniform Program Registration, or reporting services under this RFP.
- The Contractor further agrees that during the term of any resulting contract, neither the Contractor nor any of its employees shall enter into or maintain any contractual relationships or engagements that would create an actual, perceived or potential conflict of interest with the delivery of services funded under the Older Americans Act through this Agency.

#### **12. Cancellation / Termination of Contract**

- **Material Breach**

In the event of a material breach of contractual obligations by the Contractor, Jayhawk Area Agency on Aging, Inc. (the Agency) may terminate the contract. At the Agency's sole discretion, the Contractor may be given an opportunity to cure the breach or provide a written plan detailing how the breach will be remedied. The cure must be completed within 10 working days from receipt of the Agency's notification.

- **Immediate Termination**

If the Contractor fails to cure the breach within the specified timeframe, or if circumstances require immediate action, the Agency may terminate the contract immediately by written notice.

- **Agency Remedies**

If the contract is terminated for breach, the Agency reserves the right to obtain transportation services, completion of Uniform Program Registration, and related services from alternative sources.

- **Termination for Convenience**

The Agency may terminate the contract at any time for its convenience, without penalty, by providing 30 calendar days' written notice. The Contractor will be entitled to equitable compensation for services satisfactorily performed up to the effective date of termination.

#### **13. Communications and Notices**

- Notices are valid if mailed, hand-delivered, or emailed to the authorized contractor contact.

#### **14. Non-Discrimination in Employment**

- Contractors and subcontractors shall not discriminate against employees, applicants, or service recipients.
- Violations may result in contract cancellation, removal from bidder lists, or referral to Attorney General's Office as deemed appropriate.

#### **15. Americans with Disabilities Act (ADA)**

- Contractors must comply with ADA requirements and provisions.

#### **16. Title VI of the Civil Rights Act of 1964**

- Contractors and subcontractors must comply with Title VI requirements and provisions.

#### **17. Older Americans Act (OAA)**

- Contractors and subcontractors must comply with OAA requirements and provisions.

#### **18. Governing Law**

- All contractual agreements shall be subject to, governed by, and construed according to the laws of the State of Kansas

#### **19. Hold Harmless / Indemnification**

The Contractor agrees to protect, defend, indemnify, and hold Jayhawk Area Agency on Aging, Inc., its officers, employees, and agents harmless from and against any and all claims, liabilities, losses, damages, costs, or expenses, including reasonable attorney fees, arising out of or related to:

- The Contractor's performance or non-performance of services under this contract, including transportation services, Uniform Program Registration, and reporting.
- Any errors, omissions, negligence, or misconduct of the Contractor or its employees or subcontractors.
- Any personal injury or property damage resulting from the Contractor's performance of the contract.
- Any violation of applicable laws, rules, regulations, or contractual requirements in connection with the services provided.

The Contractor further agrees to investigate, handle, respond to, and defend any such claims at its own expense, even if a claim is groundless, false, or fraudulent.

## **20. Titles / Headings**

- Paragraph titles are for reference only and do not affect contractual interpretation.

## **21. Right to Examine and Audit Records**

The Contractor agrees that Jayhawk Area Agency on Aging, Inc. (the Agency), or its authorized representatives, shall have access to and the right to examine and audit any and all books, records, documents, and data related to the Contractor's performance under this contract, including:

- Transportation services provision records
- Completion of Uniform Program Registration
- Reporting and administrative activities

Such records may include hard copy documents and electronic data.

The Contractor shall require that all subcontractors, suppliers, or other payees comply with this clause by including similar requirements in their written agreements.

The Contractor further agrees to fully cooperate with the Agency in providing or making available any such records, and to ensure that all related parties and payees cooperate as well.

## **22. HIPAA Compliance**

- The Contractor and any subcontractors agree to comply with the Health Insurance Portability and Accountability Act of 1996 (HIPAA), including all applicable Administrative Simplification provisions and related regulations issued by the U.S. Department of Health and Human Services.
- The Contractor shall implement all necessary safeguards to protect the privacy and security of any protected health information (PHI) obtained in connection with providing transportation services, completion of Uniform Program Registration, or related services.
- If required, the Contractor agrees to execute any addenda, agreements, or memoranda of understanding necessary to ensure compliance with HIPAA and related regulations.

## **Jayhawk Area Agency on Aging, Inc. Special Conditions Governing Responses and Subsequent Contracts**

### **1. Compliance Requirements**

Contracts resulting from this RFP must comply with:

- Title VI of the Civil Rights Act of 1964
- Section 504 of the Rehabilitation Act (ADA)
- 45 CFR 74, 45 CFR Part 92, and EO 12549, as applicable
- 45 CFR Part 1321, as revised

- Federal, state, and local health, safety, fire, and sanitation requirements
- Older Americans Act of 1965, as amended.
- KDADS Field Service Manual policies and procedures, including HIPAA.

Note: A signed statement of assurances, included in the RFP, is required.

## **2. Insurance Requirements**

- All bidders (except local government units) must provide a Certificate of Liability Insurance and maintain coverage for the duration of the contract:
- Commercial General Liability
  - Minimum \$1,000,000 per occurrence (bodily injury, personal injury, property damage)
  - Minimum \$2,000,000 aggregate
- Workers' Compensation & Employer's Liability
  - Workers' Compensation: statutory (all states endorsement)
  - Employer's Liability: \$100,000 per occurrence
- Additional Requirements:
  - Jayhawk Area Agency on Aging, Inc., it's Board of Directors, officers, commissions, agents, and employees must be named as additional insureds.
  - This does not create a partnership or joint venture.
  - Certificate Holder:  
Jayhawk Area Agency on Aging, Inc.  
2910 SW Topeka Blvd., Topeka, KS 66611
  - 30-day advance written notice required for material changes or cancellations

## **3. Submission Timeline for Supporting Documents**

- 10 calendar days after notification to enter the contract.
- Failure to provide required insurance or bonds may result in withdrawal of award.

## **4. Contract Period**

- Effective: October 1, 2026 – September 30, 2027
- Written agreements with all contractors must be secured by August 31, 2026

## **5. Option to Renew**

- Jayhawk Area Agency on Aging, Inc. reserves the sole right to renew annually.

## **6. Contract Pricing**

- Reimbursement at a cost per one-way trip for transportation service.
- Rates remain firm during the contract period.
- Funding sources: Title III-B funds (Older Americans Act), program income, and other matching resources.

## **7. Accounting Policies**

- Contractors must follow Generally Accepted Accounting Principles (GAAP)
- Maintain accounting records supported by source documents.
- Reference: KDADS FSM 8.1.6

## **8. Licenses and Permits**

- Contractors must obtain all necessary licenses and permits.
- No expense to Jayhawk Area Agency on Aging, Inc.

## **9. Codes and Regulations**

- All work must comply with current prevailing codes and regulations.

## **10. Additional Services**

- Jayhawk Area Agency on Aging, Inc. may add services with mutual consent during the contract period.

#### **11. Negotiations**

- Agency reserves the right to negotiate any and all elements of the contract.

#### **12. Publicity Clause**

- All publicity materials must acknowledge support from:
  - Jayhawk Area Agency on Aging, Inc.
  - Kansas Department for Aging and Disability Services

#### **13. Ownership of Work Product**

- Any reports, data, or other deliverables provided to the Jayhawk Area Agency on Aging, Inc. as a result of services performed under this contract, including Uniform Program Registration, transportation services records, and related reporting, shall be the property of the Agency.
- The Agency may use, reproduce, or distribute such materials as it deems appropriate.

#### **14. Electronic Version of RFP**

- Available upon request (Word for Microsoft Windows)
- Agency does not guarantee accuracy.
- Hard copy governs in case of discrepancies.

#### **15. Technical Assistance**

- Agency staff will provide assistance as requested.
- Contact:  
2910 SW Topeka Blvd., Topeka, KS 66611  
Phone: (785) 235-1367  
reporting@jhawkaaa.org

#### **16. Conflicts of Interest**

- All applicants and any subcontractors must remain free from actual, perceived or potential conflicts of interest in the provision of services under this RFP. Conflicts of interest include, but are not limited to, any personal, financial, or organizational relationships that could influence or appear to influence the delivery of transportation services, completion of Uniform Program Registration, or related services.
- Applicants must comply with the following applicable regulations:
  - Kansas Administrative Regulations (K.A.R.) 26-3-1(1)(B) – prohibiting conflicts of interest in the provision of aging services.
  - Older Americans Act (OAA), Title III and 45 CFR 1321.67 – including conflict-of-interest requirements as they flow down to funded programs.
  - 45 CFR Part 75 – federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS awards, including conflict-of-interest standards for federally funded programs.
- Disclosure Requirement: Applicants must disclose any actual, perceived, or potential conflicts of interest at the time of proposal submission. Failure to disclose may result in disqualification from consideration or termination of award.
- Subcontractor Compliance: Applicants must ensure that any subcontractors, vendors, or other payees comply with these conflict-of-interest requirements.

#### **17. Eligible Organizations**

- Eligible organizations: public agencies, not-for-profit, or for-profit

## **REQUEST FOR PROPOSAL (RFP)**

### **OAA Title IIIB Transportation Services**

**Issued by:** Jayhawk Area Agency on Aging, Inc. (JAAA)

**RFP Release Date:** February 3, 2026

**Pre-Bid Meeting:** February 11, 2026, 9:00 AM, Central Standard Time

**Deadline to Submit Questions:** February 17, 2026, 12:00 noon, Central Standard Time

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**Contract Period:** October 1, 2026 – September 30, 2027

## **PROCUREMENT REQUIREMENTS AND SUBMISSION STANDARDS**

### **Governing Authority**

- This Request for Proposals (RFP) is issued in accordance with the Older Americans Act of 1965, as amended; applicable federal regulations; Kansas Department for Aging and Disability Services (KDADS) requirements; and the KDADS Field Support Manual (FSM). The Jayhawk Area Agency on Aging (JAAA) is required to conduct this procurement in a manner that ensures open and fair competition and the uniform application of all solicitation requirements.
- This RFP is issued consistent with the Jayhawk Area Agency on Aging's Pre-Procurement Notice Regarding Procurement Standards dated January 16, 2026, which is incorporated herein by reference.

### **Notice of Procurement Standards**

- Providers are advised that this RFP is issued consistent with the Pre-Procurement Notice Regarding Procurement Standards distributed by the Jayhawk Area Agency on Aging on January 16, 2026.
- The requirements set forth in that notice, including provider responsibility for timely and complete submissions and the statement that late or incomplete proposals will be deemed non-responsive with no exceptions, are fully incorporated into this RFP by reference and apply to this procurement in their entirety

### **Provider Responsibility**

- The responsibility for submitting a complete, accurate, timely, and responsive proposal rests solely with the responding provider.
- By submitting a proposal, the provider affirms that it has:
  - Read and understands all RFP instructions, requirements, and deadlines.
  - Reviewed all forms, certifications, assurances, and attachments required for submission.
  - Ensured that the proposal is complete and responsive at the time of submission.



- JAAA is not permitted to provide individualized assistance, reminders, or guidance to ensure provider compliance with procurement requirements, nor to remedy deficiencies in a proposal after the submission deadline, as doing so would compromise the integrity of the procurement process and violate procurement requirements.

#### **Submission Deadline and Method**

- Proposals must be submitted in the manner, format, and by the deadline specified in this RFP. It is the provider's responsibility to ensure timely receipt by JAAA.
- Failure to comply with the submission deadline or submission method specified in this RFP shall result in the proposal being deemed non-responsive.

#### **Late, Incomplete, or Non-Compliant Proposals — Non-Responsive**

- In accordance with KDADS Field Support Manual procurement requirements, proposals that are late, incomplete, or fail to strictly comply with the instructions and requirements of this RFP are considered non-responsive and must not be accepted, reviewed, or evaluated. No exceptions will be made.
- This includes, but is not limited to:
  - Proposals received after the stated deadline;
  - Proposals missing required forms, certifications, assurances, or signatures;
  - Proposals submitted using a method or format not specified in this RFP; and
  - Any materials submitted after the deadline for the purpose of correcting, clarifying, or completing a proposal.
- JAAA is prohibited from accepting or considering non-responsive proposals. A determination of non-responsiveness under this section is not subject to protest.

#### **Questions and Communications**

- All questions regarding this RFP must be submitted in writing and within the timeframe identified in this solicitation. Responses, if provided, will be issued in writing and shared in a manner consistent with KDADS FSM procurement standards.
- Verbal, informal, or unauthorized communications outside the established procurement process are not binding and must not be relied upon by providers.

#### **No Guarantee of Award**

- Submission of a proposal does not guarantee contract award or continuation of funding. Contract awards will be made based solely on responsiveness to this RFP, the evaluation criteria identified herein, availability of funds, and compliance with KDADS FSM and OAA requirements.

#### **Procurement Protest Limitations**

- Any protest related to this procurement must be submitted in writing and in accordance with the procedures and timelines specified in this RFP and applicable Kansas Department for Aging and Disability Services (KDADS) Field Support Manual (FSM) requirements.
- Protests shall be limited to allegations that the Jayhawk Area Agency on Aging (JAAA) failed to follow the procurement procedures identified in this solicitation or applicable KDADS FSM requirements.
- Protests based on a provider's failure to submit a timely, complete, or responsive proposal, including but not limited to late submissions, missing documents, incorrect submission methods, or failure to follow RFP instructions, shall not be considered.
- JAAA shall not consider protests requesting exceptions to stated submission deadlines, requirements, or evaluation procedures. Allowing such exceptions is prohibited under KDADS FSM procurement requirements and would compromise fair and open competition.
- The decision of JAAA regarding the responsiveness of a proposal and compliance with procurement requirements shall be final.

## **1. INTRODUCTION & STATEMENT OF NEED**

Jayhawk Area Agency on Aging, Inc. (JAAA) seeks proposals from qualified transportation services to provide Transportation Services funded under Title IIIB of the Older Americans Act (OAA).

The purpose of Transportation Services is to promote the health, independence, and well-being of older adults (aged 60+) residing in Douglas, Jefferson, and Shawnee Counties.

This will be achieved through:

- Transportation services to eligible participants.
- Targeted outreach to older adults with the greatest economic and social needs, including low-income, minority, limited English proficiency, and rural populations.
- Completion and maintenance of Uniform Program Registration in accordance with the Kansas Department for Aging and Disability Services (KDADS) Field Service Manual (FSM) and OAA.
- Ensuring OAA-funded transportation services are managed to provide service to eligible clients for the full contract period.

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## **2. STATEMENT OF PURPOSE**

The purpose of this RFP is to:

- Provide transportation services to eligible participants.
- Implement an Outreach Plan to engage older adults with the greatest economic or social needs.
- Conduct and maintain Uniform Program Registration for all participants, ensuring compliance with KDADS FSM and OAA criteria.

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### **3. SCOPE OF SERVICES**

#### **Transportation Service Requirements**

- One (1) unit of OAA Title IIIB Transportation service is defined as one (1) one-way trip provided to an eligible participant for an approved purpose. Approved purposes include medical and health-related appointments and other essential trips consistent with KDADS Field Support Manual and Jayhawk Area Agency on Aging (JAAA) policy, including shopping/basic needs/nutrition (including congregate meal sites), senior center trips, and social activities, as applicable.
- Transportation services are expected to be provided at a minimum as curb-to-curb level of assistance.
- Transportation services do not include the provision of medical care, personal care, physical lifting, or escort services beyond the vehicle.
- The Contractor must notify JAAA promptly of any vehicle accident, injury, or safety incident involving clients during service delivery and submit an incident report in the timeframe required by JAAA, or within twenty-four (24) hours unless otherwise specified by the Agency.
- The Contractor must provide services in compliance with the Americans with Disabilities Act (ADA), including reasonable accommodations and accessible transportation as required.
- The Contractor shall ensure that all staff involved in the delivery of transportation services receive training appropriate to their role. At a minimum, training must include working with older adults, effective communication skills, customer service expectations, and sensitivity to the needs of older individuals.
- The Contractor shall comply with all mandatory reporting requirements under applicable federal and state laws and shall promptly report any suspected abuse, neglect, exploitation, safety concerns, or other reportable incidents involving

customers to the appropriate authorities and to JAAA, in accordance with KDADS and Agency policies.

- All services provided and billed under this contract must meet the applicable service definitions and requirements for OAA Title IIIB Transportation services as established by the Older Americans Act, KDADS Field Support Manual, and JAAA policy.
- The Contractor shall comply with all personnel requirements applicable to the provision of transportation services, including employee background checks, screening, and supervision, in accordance with federal and state law, KDADS requirements, and JAAA policies.
- The Contractor shall comply with all requirements, terms, and conditions contained in the resulting service contract, this RFP, and all applicable federal, state, and local laws and regulations. (*45 CFR Part 75; Older Americans Act § 307(a)*)
- The Contractor shall remain fully responsible for compliance with all contract requirements when utilizing subcontractors, volunteers, or third-party transportation providers. All subcontracted services must meet the same requirements as services delivered directly by the Contractor.
- Vehicles used to provide transportation services under this contract must be safe, well maintained, and operated in compliance with applicable federal, state, and local laws and insurance requirements.
- **Medical Transportation Priority and Targeting**
  - In accordance with Jayhawk Area Agency on Aging, Inc. (JAAA) Board-approved policy regarding OAA Title IIIB Transportation Services, Contractors shall prioritize medical and health-related transportation needs when service capacity, scheduling availability, or funding constraints limit the ability to meet all requested transportation services.
  - JAAA has established a target that approximately sixty percent (60%) of OAA Title IIIB funded transportation units be provided for medical appointments, with the remaining forty percent (40%) allocated to general transportation purposes.
  - Medical transportation includes rides to and from appointments with medically licensed practitioners or facilities to receive medically necessary care, including but not limited to primary care, specialty care, therapy services, diagnostic testing, dialysis, behavioral health services, hospital or urgent care visits, and pharmacy trips for medication access.
  - Contractors shall track and report the purpose of all OAA Title IIIB transportation units in accordance with JAAA reporting requirements, using the following categories:
    - Medical
    - Shopping / Basic Needs / Nutrition

- Trips to or from Senior Centers
  - Social Activities
- JAAA will monitor transportation data on a regular basis to assess progress toward the medical transportation target. Contractors not meeting the target may be required to implement corrective actions and may be subject to consideration during annual funding decisions, consistent with JAAA policy and KDADS guidance.

#### **OAA Funding Allocation and Transportation Services Continuity**

- The Contractor shall ensure that OAA Title IIIB–funded Transportation services are provided to eligible clients in a manner that supports continuity of service and prioritization of needs consistent with the Older Americans Act, KDADS Field Support Manual requirements, and JAAA policy.
- Any adjustments to service provision due to funding availability, service capacity, or operational constraints must be coordinated with Jayhawk Area Agency on Aging, Inc. (JAAA) prior to implementation.
- JAAA reserves the right to direct the temporary suspension, modification, prioritization, or redirection of Transportation services when necessary to address health, safety, compliance, service equity, or funding concerns.

#### **Eligibility**

Eligible participants for OAA Title IIIB Transportation services include persons age sixty (60) and older residing in Shawnee, Jefferson, and Douglas Counties, Kansas, who meet eligibility requirements as defined in the KDADS Field Support Manual.

#### **Uniform Program Registration**

- The Contractor shall complete, maintain, and update a Uniform Program Registration (UPR) for each Transportation customer in accordance with KDADS Field Support Manual requirements. (*KDADS Field Support Manual §§ 2.5, 2.7*)
- Uniform Program Registration is valid for three hundred sixty-five (365) days and must be reviewed and updated in accordance with KDADS Field Support Manual requirements. (*KDADS Field Support Manual § 2.5*)
- The Contractor must complete a Uniform Program Registration (UPR) for each eligible customer receiving OAA Title IIIB Transportation services prior to service delivery, except as otherwise permitted by KDADS policy. (*KDADS Field Support Manual §§ 2.5,*)
- Transportation services funded under OAA Title IIIB shall not be provided or billed without a current and valid Uniform Program Registration on file, except as

otherwise permitted by KDADS policy. (*Older Americans Act § 321(a)*; *KDADS Field Support Manual §§ 2.5*).

- The Contractor shall implement procedures to ensure customers are notified of the opportunity to re-register at least thirty (30) days prior to the expiration of their Uniform Program Registration.
- The Contractor must ensure that all Uniform Program Registrations are entered into the Kansas Aging Management Information System (KAMIS) in accordance with KDADS policies, procedures, and timelines.
- Transportation services funded under OAA Title IIIB shall not be provided or billed prior to the customer being determined eligible and having a current, valid Uniform Program Registration (UPR) on file, except as otherwise expressly permitted by KDADS policy.

### **Grievance Management**

- Respond promptly to all client grievances related to OAA Title IIIB Transportation services.
- Document each grievance, including the nature of the grievance, actions taken, and final resolution.
- Coordinate with Jayhawk Area Agency on Aging, Inc. (JAAA) to ensure grievances are addressed in accordance with Older Americans Act and KDADS Field Support Manual requirements.
- Maintain copies of all grievances and related correspondence in the client's file and make such records available for monitoring or audit upon request.
- Ensure all staff involved in Transportation services are trained in grievance procedures and client rights.
- Ensure all staff involved in Transportation services are trained in grievance procedures and client rights.

### **Documentation and Recordkeeping**

- Maintain copies of all Uniform Program Registration (UPR) forms in each customer's case file and ensure such records are available for monitoring, audit, or quality assurance review upon request.
- Ensure all clients are informed of and have access to grievance procedures in accordance with the Older Americans Act and KDADS Field Support Manual requirements, including provision of rights and complaint information in a manner that is understandable and accessible to the client.

### **Coordination and Quality Assurance**

- Coordinate with Jayhawk Area Agency on Aging, Inc. (JAAA) and other service providers to support a comprehensive, coordinated system of care for older adults.
- Coordinate with Jayhawk Area Agency on Aging, Inc. (JAAA) and other service providers to support a comprehensive, coordinated system of care for older adults.
- Conduct at least annual customer satisfaction surveys and submit complete results to JAAA, including summaries of findings and any corrective actions taken in response to survey feedback.
- Comply with JAAA's annual Quality Assurance (QA) review process, including participation in monitoring activities and implementation of required corrective actions.
- Quality Assurance reviews may include, but are not limited to:
  - Verification of Uniform Program Registration (UPR) documentation
  - Review of eligibility and service records
  - Resolution of documentation discrepancies or conflicts
  - Direct client contact, if needed
  - Review and documentation of corrective actions taken

JAAA may review the Contractor's referral tracking system during QA visits to verify timely service initiation, compliance with eligibility procedures, and completeness and accuracy of client records.

Promptly notify JAAA of any concerns related to the health, safety, well-being, or service needs of customers served under this contract, in accordance with JAAA procedures and applicable federal and state requirements.

## **Reporting and Recordkeeping**

All reporting requirements must be submitted to [reporting@jhawkaaa.org](mailto:reporting@jhawkaaa.org).

- **Monthly Program and Financial Reports**
  - Submit monthly program reports by the 10th of the following month (if the 10th falls on a weekend day, reports are due the Friday prior). Reports must include customer names and the number of OAA Title IIIB Transportation service units (one-way trips) provided, using the required JAAA Excel reporting format.
  - Submit monthly invoices and financial reports to Jayhawk Area Agency on Aging, Inc. by the 10th day of the month following the month in which services were provided, using the required JAAA financial reporting form.

- Submit a final financial report to Jayhawk Area Agency on Aging, Inc. no later than thirty (30) days following the end of the contract period, using the required JAAA form.
- Maintain complete and accurate documentation to support all services billed, including but not limited to services provided, time spent, transportation units delivered, program income received, and any other records required for quality assurance, monitoring, or audit purposes.
- Documentation submitted in support of payment requests must comply with JAAA procedures and reporting requirements. Failure to submit complete or compliant documentation may result in delayed or denied reimbursement.
- **Program Income**
  - The Contractor must report all program income, including voluntary customer donations, to Jayhawk Area Agency on Aging, Inc. no later than the 10th day of the month following the month in which donations were received, using the format and procedures prescribed by JAAA.
  - All program income must be used to expand or enhance transportation and supportive services in accordance with Older Americans Act Section 315(b)(4)(E) and applicable KDADS policy.
  - Program income may not be used to supplant existing services or required match.
  - The Contractor must maintain complete and accurate program income records and make such records available for review during monitoring, audit, or evaluation activities conducted by Jayhawk Area Agency on Aging, Inc., KDADS, or federal oversight entities.
- **Monthly Waitlist Numbers:**
  - The Contractor shall submit monthly transportation waitlist information to Jayhawk Area Agency on Aging, Inc. by the end of the last business day of each month to allow JAAA to meet KDADS reporting deadlines.
  - For purposes of OAA Title IIIB Transportation reporting, monthly waitlist numbers must include all of the following categories:
    - OAA-eligible individuals approved and waiting to receive OAA-funded transportation services due to funding, capacity, or scheduling limitations
    - OAA-eligible individuals receiving transportation services funded by non-OAA sources due to limited OAA capacity; and



- Unmet transportation requests, defined as requested trips that could not be completed due to capacity, scheduling, staffing, or funding constraints.
  - **Record Retention:**
    - The Contractor shall maintain all program, financial, eligibility, registration, reporting, waitlist, grievance, and supporting documentation for a minimum of five (5) years following the end of the contract period. Records must be made available upon request for auditing, monitoring, or evaluation by Jayhawk Area Agency on Aging, Inc., the Kansas Department for Aging and Disability Services, or federal oversight agencies.
  - **Program Budget Submissions:**
    - Any proposed program budgets, budget revisions, or reallocations related to OAA Title IIIB Transportation services must be submitted to Jayhawk Area Agency on Aging, Inc. for review and written approval prior to implementation.
- 

#### **4. CONTRACT PERIOD AND PERFORMANCE**

- Contract Term: October 1, 2026 – September 30, 2027
  - Payment: JAAA pays within 30 days after verifying invoices with transportation manifest data.
  - Monitoring: JAAA reserves the right to monitor compliance with all KDADS FSM requirements, contract deliverables, and OAA fund continuity.
  - Final payment is contingent upon receipt and approval of all required final programmatic and financial reports.
- 

#### **5. NONDISCRIMINATION**

- The Contractor shall not deny services or discriminate against any individual on the basis of race, color, religion, sex (including sexual orientation and gender identity), age, national origin, ancestry, disability, or income status in the provision of OAA Title IIIB Transportation services. (*Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d; 45 CFR § 80.3; Older Americans Act §§ 305(a)(2)(A), 315(b)*)
- The Contractor shall comply with the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act and shall provide reasonable accommodations and accessible transportation services to individuals with disabilities, including modifications to policies, practices, or procedures when

necessary to avoid discrimination. (*Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12131–12134; 28 CFR Part 35; Section 504 of the Rehabilitation Act, 29 U.S.C. § 794; 45 CFR Part 84*)

- The Contractor shall take reasonable steps to provide meaningful access to services for individuals with limited English proficiency (LEP), including language assistance services as required. (*Title VI of the Civil Rights Act of 1964; 45 CFR § 80.3; Executive Order 13166; HHS LEP Guidance, 68 FR 4731*)
- The Contractor shall not intimidate, threaten, coerce, or retaliate against any individual for filing a discrimination complaint, participating in an investigation, or exercising rights protected under federal or state nondiscrimination laws. (*45 CFR § 80.7(b); 28 CFR § 35.134; 45 CFR § 84.61*)
- Participants may report discrimination concerns to Jayhawk Area Agency on Aging, Inc., the Kansas Department for Aging and Disability Services, or appropriate federal or state civil rights enforcement agencies. (*Older Americans Act § 307(a)(12); 45 CFR § 1321.17*).

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## 6. PROPOSAL SUBMISSION REQUIREMENTS

Each proposal must include the following components. Proposers should use this as a guide to ensure all required information is provided:

- **Organizational Information**
  - Legal Name Address and contact information.
  - Brief overview of the organization, history, and experience delivering Transportation services or similar services including background history about the organization, current service provided and the service standards which includes bidder summary, bidder qualifications and bidder's ability to meet service standards.
  - Staff information for all staff directly and indirectly related to transportation services.
  - Provide a current list of the Governing Board of Directors, designating the leadership positions.
  - Listing of authorized signers
- **Service Delivery Plan**
  - Provide a description of how your agency plans to deliver OAA Title IIIB Transportation services, including how rides are scheduled, dispatched, and communicated to participants.

- Describe hours/days of operation, service area coverage, trip request methods, and any trip limitations (if applicable).
- Describe your process for handling same-day requests, cancellations, no-shows, and ride denials, and how those events are documented and reported.
- Describe your participant management practices.
- Describe the level of assistance provided during transportation services (e.g., curb-to-curb), including how staff are trained to ensure services do not exceed the level of assistance permitted under OAA Title IIIB Transportation and KDADS Field Support Manual requirements.
- Describe how one-way transportation service units are defined, scheduled, documented, and billed in accordance with OAA Title IIIB service definitions and JAAA reporting requirements
- Describe procedures for reporting vehicle accidents, injuries, safety incidents, or other reportable events involving customers, including required timelines and documentation provided to Jayhawk Area Agency on Aging, Inc.
- Describe how the organization ensures compliance with the Americans with Disabilities Act (ADA), including provision of reasonable accommodations and accessible transportation services for eligible participants.
- Describe vehicle safety, maintenance, inspection, and insurance practices used to ensure compliance with applicable federal, state, and local laws and JAAA requirements.
- Describe staff training and procedures for mandatory reporting of suspected abuse, neglect, exploitation, or other reportable concerns involving participants, including coordination with Jayhawk Area Agency on Aging, Inc. and appropriate authorities.
- If subcontractors, volunteers, or third-party transportation providers are utilized, describe oversight and monitoring procedures to ensure all services meet OAA Title IIIB, KDADS Field Support Manual, and JAAA requirements. The Contractor remains fully responsible for compliance.
- Describe how service levels are adjusted in coordination with Jayhawk Area Agency on Aging, Inc. when funding availability, capacity limitations, or policy requirements necessitate prioritization, modification, or temporary suspension of services.
- How you will maintain and manage any wait lists for OAA-funded transportation services, including:
  - Tracking and prioritizing participants waiting for services.

- Procedures for notifying participants when service becomes available.
- **Eligibility, Assessment, and Client Rights Plan**
  - What is your process for completing and maintaining the Uniform Program Registration.
  - Describe the procedure for providing OAA Grievance Rights & Responsibilities forms (KDADS form SS-12) to participants and your process for managing filed grievances including documentation, staff training, and reporting to JAAA.
  - Describe your process for tracking UPR expiration dates and notifying customers of the opportunity to re-register at least thirty (30) days prior to expiration.
- **Training Plan**
  - The proposal must include a training plan for personnel involved in the program. The following items must be discussed in detail:
    - Method used to determine training needs of staff, board members, volunteers, and clients (as applicable)
    - Who will receive training (e.g., board, staff, drivers, dispatchers, volunteers, client-facing personnel)
    - Who will provide the training (internal, external, credentialed trainers, partner agencies)
    - Content of training (at minimum: working with older adults, communication skills, customer service expectations, safety, confidentiality, and mandatory reporting)
    - Frequency of training (orientation, annual, refresher, ongoing)
    - Method for evaluating training effectiveness (e.g., quizzes, observations, ride audits, participant feedback, corrective action trends)
- **Outreach Plan**
  - Discuss your strategies to reach older adults with economic or social needs (low-income, minority, limited English proficiency, rural).
- **Data Management and Reporting Plan**
  - Explain your plan for:
    - Submission plan for monthly program and financial reports.

- Tracking and reporting on OAA funded transportation services and clients and wait list or denied ride tracking.
- Describe how you will track and report trip purpose categories to meet JAAA reporting requirements.
- Medical Transportation Target
  - Describe how your organization meets (or will meet) the 60% medical transportation target for OAA Title IIIB transportation units.
  - Provide a brief corrective strategy if performance falls below target.
- Historical Service Units (Required Table)
  - Provide the total number of OAA transportation units (one-way trips) under each category for the fiscal years listed below:

Category	FY 2023	FY 2024	FY 2025	FY 2026 YTD (if applicable)
Medical				
Shopping/Basic Needs/Nutrition				
Trips to/from Senior Center				
Social Activities				

- **Coordination and Quality Assurance**

- Describe the procedures used to ensure quality service delivery to customers.
- Describe the instruments/tools used for monitoring and evaluating Quality Assurance (QA) (e.g., file reviews, ride audits, observation checklists, call-backs, complaint logs, corrective action tracking).
- Describe your process for program evaluation (frequency, measures reviewed, and who reviews results).
- Provide the procedure for disseminating the agency's customer satisfaction survey, including:
  - How the survey is administered (mail/phone/in-person/online)
  - How the agency ensures participation (response supports, reminders, accessibility/LEP supports)
  - How processes change based on survey results (feedback loop and corrective actions)

Attach a copy of your most current customer satisfaction survey and the most recent available results/summary. If survey results are not available, explain why and describe alternative methods used to obtain customer feedback.

- **Budget and Financial Plan**

- Please provide a detailed description of all other funding sources that support your Transportation services program, including:
  - The type of funding (federal, state, local, private donations, grants, in-kind contributions, etc.)
  - The typical amount received from each source annually.
  - The timing or schedule of when funds are received throughout the year.
  - Any restrictions or requirements attached to the funding.
  - Strategies used to obtain or secure these funds and any plans for sustainability.

- **Cost per Ride and Funding Structure**

- What is the total cost per ride for your agency? (Include total cost for all rides served, regardless of funding source.)
- Provide the calculated entire program transportation cost per unit (all funding sources) using the formula below:

$$\begin{aligned} &\text{Total transportation expenses: \$} \underline{\hspace{2cm}} \\ &\div \text{Total units of transportation provided: } \underline{\hspace{2cm}} \\ &= \text{Cost per unit: \$} \underline{\hspace{2cm}} \end{aligned}$$

JAAA reserves the right to request additional documentation or clarification regarding cost calculations submitted by proposers.

- **Suggested Donation and Program Income**

- What is your suggested donation per ride? How was this amount determined?
- Describe how you educate participants regarding the importance of voluntary donations and how donations are collected, accounted for, and reported as program income.

- **Proposed Units, Requested Award, and Required Match**

- All OAA Title IIIB bidders must provide match dollars and identify the source(s) of match. The match share required toward each unit equals 10.526% of the unit cost. The federal reimbursement rate per unit will be the provider unit rate minus required match minus program income, for each unit delivered. Any bidder contracted with JAAA for OAA Title IIIB Transportation will be responsible for required matching funds and for collecting, accounting for, and reporting all program income. Match contributions must be verifiable and may include cash or allowable in-kind contributions in accordance with OAA and KDADS policy.

Submit the proposed number of units to be provided and the total requested award amount, including a breakdown of costs justifying the request.

Proposed number of units to be provided: \_\_\_\_\_

Total requested award: \$\_\_\_\_\_ (attach cost justification)

- **Required Attachments** (if applicable):
  - Most recent customer satisfaction survey and results/summary
  - Historical service units table
  - Cost justification and budget breakdown
- **Formatting Guidelines:**
  - Electronic submissions should be converted from Word to PDF format.
  - Proposals should be clear, concise, and complete; no page limit is required, but brevity is encouraged.
- **Submission Instructions:**
  - Submit electronically:  
Jayhawk Area Agency on Aging, Inc.  
Attn: [reporting@jhawkaaa.org](mailto:reporting@jhawkaaa.org)

Proposal Due Date: March 13, 2026, 12:00 noon, Central Standard Time

- **Important Notes:**
  - Proposals must address all evaluation criteria outlined in this RFP.
  - Proposals must follow the structure and headings of the official RFP Response Template. Reordering, renaming, or omission of sections may result in the proposal being deemed non-responsive.
  - Late or incomplete submissions may not be considered.

Proposers are encouraged to respond fully to any specific questions or requirements identified in the RFP.

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## **7.EVALUATION CRITERIA**

Proposals will be evaluated by the Jayhawk Area Agency on Aging, Inc. (JAAA) Review Committee based on the following weighted criteria. Evaluation will focus on the proposer's capacity, experience, program quality, and compliance with KDADS FSM and Older Americans Act (OAA) requirements. Proposers' demonstrated capacity to prioritize and track medical transportation services consistent with JAAA policy will be considered. Each proposal must address all criteria outlined below to be considered complete.

### **Organizational Capacity (15 points)**

- Legal name, address, contact information
- Demonstrated history and experience in providing Transportation or comparable services.
- Demonstrated bidder qualifications and ability to meet service standards.
- Qualifications and experience of key personnel and staff involved in transportation services production, delivery, assessment, and data management.
- Adequate staffing levels and organizational structure to ensure continuity of service, including a current Governing Board of Directors list with leadership roles and responsibilities.
- Clear identification of authorized signers and responsible parties.

### **Service Delivery Plan (20 points)**

- Ride scheduling, dispatch, and communication
- Hours/days of operation and service area
- Trip request methods and limitations
- Handling of same-day requests, cancellations, no-shows, denials
- Participant management practices
- Waitlist management, prioritization, and notification
- Compliance with safety, accessibility, and service delivery requirements, including ADA accommodations, level of assistance, vehicle safety, incident reporting, and subcontractor oversight.

### **Eligibility, Assessment, and Client Rights (15 points)**



- Compliance with KDADS FSM for completing and maintaining Uniform Program Registration (UPR).
- Procedures for UPR expiration tracking and re-registration notifications
- Effective procedures for providing OAA Grievance Rights & Responsibilities, documenting grievances, and ensuring staff training and reporting to JAAA.

#### **Outreach (10 points)**

- Effective strategies for outreach to older adults with the greatest economic or social need, including low-income, minority, rural, and limited English proficiency populations.
- Demonstrated strategies tailored to populations with the greatest economic or social need

#### **Data Management and Reporting (10 points)**

- Plan for timely submission of monthly reports, transportation services counts, and financial data.
- Data accuracy, reporting, and transportation unit tracking, including:
  - Waitlist and denied ride tracking
  - Trip purpose categorization and demonstrated ability to track, report, and manage transportation units by purpose, including progress toward the 60% medical transportation target.
  - Medical Transportation Target, 60% medical strategy and corrective strategy if below target
  - Historical service units table

#### **Coordination and Quality Assurance (10 points)**

- Evidence of a structured program evaluation process, including review frequency and use of results for corrective action
- Strength of coordination with JAAA and other community-based organizations.
- Approach to quality assurance, including customer satisfaction surveys, performance monitoring, and corrective action.
- Evidence of internal program evaluation process to ensure KDADS FSM compliance.
- Staff training practices that support service quality, safety, and compliance
- Attachment of survey and results

#### **Budget and Financial Management (20 points)**

- Budget and Financial Plan
  - Complete description of all additional funding sources (federal, state, local, private, etc.), including timing, restrictions, and sustainability strategies.

- Cost per Ride and Funding Structure
  - Cost per unit calculation
- Suggested Donation and Program Income
- Proposed Units, Requested Award, and Required Match
  - Match calculation
  - Program income responsibility
- Clear and realistic program budget that aligns with proposed service levels and funding limits.
- Evidence of sound fiscal management, financial stability, and internal controls.

### **Evaluation Method**

- Each criterion will be scored on a 0–5 scale by the evaluation committee and weighted according to point values listed above.
- JAAA reserves the right to request clarification, conduct interviews, or seek additional documentation during the review process.
- Final selection will be based on total score, completeness of proposal, cost-effectiveness, and the proposer’s demonstrated ability to meet the needs of the service area.

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## **8. RIGHTS AND RESERVATIONS**

Jayhawk Area Agency on Aging, Inc. (JAAA) reserves the right to:

- Reject any and all proposals received or waive any minor irregularities or informalities in proposals.
- Request additional information, clarification, or revisions from proposers.
- Negotiate modifications to proposals prior to final selection.
- Impose additional conditions based on programmatic, financial, or administrative risk.
- Make awards contingent upon the availability of federal, state, or local funds.
- Amend or cancel this RFP at any time, or extend proposal submission deadlines, at its sole discretion.
- Determine, at its sole discretion, the final evaluation and selection of proposals.
- Retain all proposals and related materials submitted, using them solely for evaluation purposes.

Issuance of this RFP does not commit JAAA to award a contract or pay any costs incurred in the preparation of proposals.

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## **9. CONTACT INFORMATION**

All inquiries regarding this Request for Proposal must be submitted in writing to:

Stefanie Goodwin

Jayhawk Area Agency on Aging, Inc.

2910 SW Topeka Blvd.

Topeka, KS 66611

Email: [sgoodwin@jhawkaaa.org](mailto:sgoodwin@jhawkaaa.org)

Phone: 785-2356-1367

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## **10. Attachments**

- Response Template RFP OAA IIIB Transportation
- Compliance Acknowledgment Form for Title VI, Section 504, ADA, and Other Relevant Regulations
- OAA IIIB Transportation RFP Score Sheet
- OAA IIIB Transportation Policy Approved
- OAA IIIB Transportation Policy Draft
- OAA and SCA Unserved and Underserved Demand Access Barrier Reporting Policy

**JAYHAWK AREA AGENCY ON AGING, INC.**

**OLDER AMERICANS ACT**

**TITLE IIIB Transportation APPLICATION**

**FISCAL YEAR 2027 (October 1, 2026, through September 30, 2027)**

**COVER SHEET**

**ORGANIZATION  
NAME:**

\_\_\_\_\_

**ADDRESS:**

\_\_\_\_\_

\_\_\_\_\_

**PHONE #:**

\_\_\_\_\_

**EMAIL:**

\_\_\_\_\_

**DIRECTOR'S NAME:**

\_\_\_\_\_

**TOTAL IIIB FUNDS REQUESTED:**

**\$**

\_\_\_\_\_

**TOTAL IIIB RIDES PROPOSED:**

\_\_\_\_\_

**CALCULATED PER RIDE RATE:**

**\$**

\_\_\_\_\_

\_\_\_\_\_

**SIGNATURE OF AUTHORIZED OFFICIAL**

**DATE**

## **Compliance Acknowledgment Form For Title VI, Section 504, ADA, and Other Relevant Regulations**

**Organization Name:** \_\_\_\_\_

### **Acknowledgment of Legal Compliance**

Please read and acknowledge the following regulations and standards.

#### **Title VI of the Civil Rights Act of 1964**

I hereby acknowledge that my organization complies with Title VI, prohibiting discrimination on the basis of race, color, or national origin in programs and activities receiving federal financial assistance.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **Section 504 of the Rehabilitation Act (ADA)**

I hereby acknowledge that my organization complies with Section 504 and the Americans with Disabilities Act (ADA), ensuring equal access to services for individuals with disabilities.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **45 CFR 74, 45 CFR Part 92, and EO 12549**

I acknowledge that my organization complies with the regulations outlined in 45 CFR 74, 45 CFR Part 92, and EO 12549 as applicable to the administration of federal grants and contracts.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **45 CFR Part 1321 (as revised)**

I acknowledge that my organization complies with the provisions of 45 CFR Part 1321, as revised, which pertains to the administration of services for older individuals.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **Federal, State, and Local Health, Safety, Fire, and Sanitation Requirements**

I acknowledge that my organization meets all applicable health, safety, fire, and sanitation requirements as stipulated by federal, state, and local regulations.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

**Older Americans Act of 1965, as amended**

I acknowledge that my organization complies with the Older Americans Act of 1965, as amended, to provide services for older adults.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

**KDADS Field Service Manual Policies and Procedures, Including HIPAA**

I acknowledge that my organization complies with the policies and procedures of the Kansas Department for Aging and Disability Services (KDADS), including Health Insurance Portability and Accountability Act (HIPAA) regulations regarding privacy and security of health information.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

By signing below, I certify that the information provided is true and accurate to the best of my knowledge. I understand that failure to comply with the regulations listed above may result in penalties, including suspension or termination of funding or services.

- **Name of Authorized Representative:** \_\_\_\_\_
- **Title:** \_\_\_\_\_
- **Signature:** \_\_\_\_\_
- **Date:** \_\_\_\_\_

## **RFP RESPONSE**

### **OAA Title IIIB Transportation Services**

Jayhawk Area Agency on Aging, Inc. (JAAA)

#### **Instructions to Proposers**

- Respond to each section and subsection exactly as labeled below.
- Do not reorder, rename, or omit sections.
- If an item does not apply, state “Not Applicable” and explain why.
- Attach all required documentation where indicated.
- Responses must be clear, concise, and complete.
- Failure to follow this structure may result in the proposal being deemed non-responsive.

#### **1. Organizational Information**

##### **1.1 Organizational Overview**

Provide the following:

- Legal name, address, phone number, and email
- Brief history and background of the organization
- Experience delivering transportation services or comparable services
- Summary of qualifications and ability to meet service standards
- Current services provided and geographic area served

##### **1.2 Governance and Authorized Signers**

- Attach a current list of the Governing Board of Directors, identifying leadership positions
- Identify authorized signer(s) (name and title)

##### **1.3 Staffing**

Describe all staff directly and indirectly involved in transportation services, including:

- Drivers
- Dispatchers
- Supervisory/management staff
- Administrative, reporting, and fiscal staff
- Volunteers (if applicable)

---

## **2. Service Delivery Plan**

### **2.1 Transportation Service Operations**

Describe how OAA Title IIIB Transportation services will be delivered, including:

- Ride scheduling, dispatch, and communication with participants
- Hours and days of operation

- Service area coverage
- Trip request methods
- Any trip limitations

## **2.2 Same-Day Requests and Ride Management**

**Describe procedures for:**

- Same-day requests
- Cancellations
- No-shows
- Ride denials

**Include how each is documented and reported.**

## **2.3 Participant Management**

**Describe participant management practices, including intake, ongoing communication, and service coordination.**

## **2.4 Level of Assistance**

**Describe:**

- The level of assistance provided (e.g., curb-to-curb)
- How staff are trained to ensure assistance does not exceed what is permitted under OAA Title IIIB and KDADS FSM requirements

## **2.5 Transportation Unit Definition and Billing**

**Describe how:**

- One-way transportation service units are defined
- Trips are scheduled and documented
- Units are billed and reported in accordance with OAA Title IIIB service definitions and JAAA requirements

## **2.6 Safety, Incidents, and ADA Compliance**

**Describe:**

- Procedures for reporting vehicle accidents, injuries, safety incidents, or other reportable events, including timelines and documentation provided to JAAA
- How ADA compliance is ensured, including reasonable accommodations and accessible transportation services
- Vehicle safety, maintenance, inspection, and insurance practices

## **2.7 Staff Training and Mandatory Reporting**

**Describe:**

- Training related to working with older adults, customer service, safety, confidentiality, and mandatory reporting
- Procedures for reporting suspected abuse, neglect, exploitation, or other reportable concerns
- Coordination with JAAA and appropriate authorities



## **2.8 Subcontractors and Third-Party Providers**

**If applicable, describe:**

- Use of subcontractors, volunteers, or third-party transportation providers
- Oversight and monitoring procedures
- How compliance with OAA Title IIIB, KDADS FSM, and JAAA requirements is ensured

## **2.9 Funding-Based Service Adjustments**

**Describe how service levels are adjusted in coordination with JAAA when funding availability, capacity limitations, or policy requirements require prioritization, modification, or temporary suspension of services.**

## **2.10 Wait List Management**

**Describe how wait lists are managed, including:**

- Tracking and prioritization of participants waiting for services
- Procedures for notifying participants when service becomes available

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## **3. Eligibility, Assessment, and Client Rights Plan**

### **3.1 Uniform Program Registration (UPR)**

**Describe:**

- Procedures for completing and maintaining UPR
- How UPR expiration dates are tracked
- How customers are notified at least thirty (30) days prior to expiration

### **3.2 Client Rights and Grievances**

**Describe:**

- Procedures for providing OAA Grievance Rights & Responsibilities (KDADS Form SS-12)
- Grievance handling, documentation, and resolution
- Staff training related to client rights
- Reporting of grievances to JAAA

---

## **4. Training Plan**

**Describe the organization's training plan, including:**

- How training needs are determined
- Who receives training (staff, drivers, dispatchers, volunteers, board, etc.)
- Who provides training
- Training content (at minimum: older adults, communication, customer service, safety, confidentiality, mandatory reporting)
- Frequency of training
- Methods used to evaluate training effectiveness

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## 5. Outreach Plan

Describe strategies to reach:

- Low-income older adults
- Minority populations
- Rural communities
- Individuals with limited English proficiency

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## 6. Data Management and Reporting Plan

Describe:

- Procedures for submitting monthly program and financial reports
- Tracking and reporting transportation services and clients
- Wait list and denied ride tracking
- Trip purpose categorization

### 6.1 Medical Transportation Target

Describe:

- How the organization meets or will meet the 60% medical transportation target
- Corrective strategies if performance falls below the target

### 6.2 Historical Service Units (Required Table)

Provide total OAA transportation units (one-way trips) by category:

Category	FY 2023	FY 2024	FY 2025	FY 2026 YTD
Medical				
Shopping / Basic Needs / Nutrition				
Senior Center Trips				
Social Activities				

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## 7. Coordination and Quality Assurance

Describe:

- Procedures to ensure quality service delivery
- QA tools used (file reviews, ride audits, call-backs, complaint logs, corrective action tracking)
- Program evaluation process (frequency, measures reviewed, responsible staff)
- Customer satisfaction survey procedures:
  - Method of administration
  - Participation supports
  - How results are used for improvement

Attach:

- Most recent customer satisfaction survey
  - Most recent survey results or summary (or explanation if unavailable)
- 

## **8. Budget and Financial Plan**

### **8.1 Other Funding Sources**

**Describe all other funding sources, including:**

- Type of funding
- Typical annual amount
- Timing of funds
- Restrictions
- Sustainability strategies

### **8.2 Cost per Ride and Funding Structure**

**Provide:**

- Total transportation expenses
- Total units provided
- Cost per unit calculation

### **8.3 Suggested Donation and Program Income**

**Describe:**

- Suggested donation per ride
- How donations are explained to participants
- Collection, accounting, and reporting of program income

### **8.4 Proposed Units, Requested Award, and Match**

**Provide:**

- Proposed number of units
  - Total requested award amount
  - Cost justification
  - Match sources and calculation
- 

## **Required Attachments**

- Customer satisfaction survey and results (if applicable)
  - Historical service units table
  - Cost justification and budget breakdown
- 

## **Certification**

**I certify that the information provided is true, complete, and accurate.**

**Authorized Signature:** \_\_\_\_\_

**Name and Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **Compliance Acknowledgment Form For Title VI, Section 504, ADA, and Other Relevant Regulations**

**Organization Name:** \_\_\_\_\_

### **Acknowledgment of Legal Compliance**

Please read and acknowledge the following regulations and standards.

#### **Title VI of the Civil Rights Act of 1964**

I hereby acknowledge that my organization complies with Title VI, prohibiting discrimination on the basis of race, color, or national origin in programs and activities receiving federal financial assistance.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **Section 504 of the Rehabilitation Act (ADA)**

I hereby acknowledge that my organization complies with Section 504 and the Americans with Disabilities Act (ADA), ensuring equal access to services for individuals with disabilities.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **45 CFR 74, 45 CFR Part 92, and EO 12549**

I acknowledge that my organization complies with the regulations outlined in 45 CFR 74, 45 CFR Part 92, and EO 12549 as applicable to the administration of federal grants and contracts.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **45 CFR Part 1321 (as revised)**

I acknowledge that my organization complies with the provisions of 45 CFR Part 1321, as revised, which pertains to the administration of services for older individuals.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **Federal, State, and Local Health, Safety, Fire, and Sanitation Requirements**

I acknowledge that my organization meets all applicable health, safety, fire, and sanitation requirements as stipulated by federal, state, and local regulations.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

#### **Older Americans Act of 1965, as amended**

I acknowledge that my organization complies with the Older Americans Act of 1965, as amended, to provide services for older adults.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

**KDADS Field Service Manual Policies and Procedures, Including HIPAA**

I acknowledge that my organization complies with the policies and procedures of the Kansas Department for Aging and Disability Services (KDADS), including Health Insurance Portability and Accountability Act (HIPAA) regulations regarding privacy and security of health information.

☐ Yes ☐ No *If "No," provide explanation:* \_\_\_\_\_

By signing below, I certify that the information provided is true and accurate to the best of my knowledge. I understand that failure to comply with the regulations listed above may result in penalties, including suspension or termination of funding or services.

- **Name of Authorized Representative:** \_\_\_\_\_
- **Title:** \_\_\_\_\_
- **Signature:** \_\_\_\_\_
- **Date:** \_\_\_\_\_

## OAA TITLE III-B TRANSPORTATION- REVIEWER SCORE SHEET

Bidder Name: \_\_\_\_\_

Reviewer Name: \_\_\_\_\_

Date: \_\_\_\_\_

Reviewers shall assign a raw score from 0–5 for each evaluation category. The raw score will be converted to a weighted score by dividing the raw score by 5 and multiplying by the maximum points available for that category. The final proposal score is the sum of all weighted category scores.

### SCORING SCALE

0 = Not addressed / Non-responsive

1 = Poor – Significant deficiencies

2 = Fair – Partially meets requirements

3 = Acceptable – Meets minimum requirements

4 = Good – Exceeds requirements

5 = Excellent – Fully exceeds requirements

### SECTION 1 — ORGANIZATIONAL CAPACITY (15 POINTS TOTAL)

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Legal name, address, and contact information	
History and experience providing transportation or comparable services	
Bidder qualifications and ability to meet service standards	
Qualifications and experience of key personnel and staff	
Staffing levels, organizational structure, and Governing Board	
Identification of authorized signers and responsible parties	

**Section Raw Score (0–5):** \_\_\_\_ **Section Weighted Score (Max 15):** \_\_\_\_ (*Raw score ÷ 5 × 15*)

**SECTION 2 — SERVICE DELIVERY PLAN (20 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Ride scheduling, dispatch, and participant communication	
Hours/days of operation and service area coverage	
Trip request methods and any limitations	
Handling of same-day requests, cancellations, no-shows, and denials	
Participant management practices	
Waitlist management, prioritization, and notification	
Compliance with safety, accessibility, and service delivery requirements (ADA, level of assistance, vehicle safety, incident reporting, subcontractor oversight)	

**Section Raw Score (0–5):** \_\_\_\_ **Section Weighted Score (Max 15):** \_\_\_\_ (*Raw score ÷ 5 × 15*)

**SECTION 3 — ELIGIBILITY, ASSESSMENT & CLIENT RIGHTS (15 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Compliance with KDADS FSM for Uniform Program Registration (UPR)	
UPR expiration tracking and re-registration notifications	
Distribution of OAA Grievance Rights & Responsibilities (SS-12)	
Grievance documentation, staff training, and reporting to JAAA	

**Section Raw Score (0–5):** \_\_\_\_ **Section Weighted Score (Max 15):** \_\_\_\_ (*Raw score ÷ 5 × 15*)

**SECTION 4 — OUTREACH (10 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Outreach strategies for populations with greatest economic or social need	
Targeted strategies for low-income, minority, rural, and LEP populations	

**Section Raw Score (0–5):** \_\_\_\_ **Section Weighted Score (Max 15):** \_\_\_\_ (*Raw score ÷ 5 × 15*)

**SECTION 5 — DATA MANAGEMENT & REPORTING (10 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Timely submission of monthly program and financial reports	
Accuracy of transportation unit tracking and reporting	
Waitlist and denied ride tracking	
Trip purpose categorization and medical transportation tracking	
Strategy and corrective actions related to 60% medical transportation target	
Historical service units table	

**Section Raw Score (0–5):** \_\_\_\_ **Section Weighted Score (Max 15):** \_\_\_\_ (*Raw score ÷ 5 × 15*)



**SECTION 6 — COORDINATION & QUALITY ASSURANCE (10 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Coordination with JAAA and community partners	
Quality assurance processes and performance monitoring	
Customer satisfaction survey administration and use of results	
Internal program evaluation process and corrective actions	
Staff training practices supporting service quality, safety, and compliance	
Attachment of survey instrument and results (or explanation)	

**Section Raw Score (0–5): \_\_\_\_ Section Weighted Score (Max 15): \_\_\_\_** (*Raw score ÷ 5 × 15*)

**SECTION 7 — BUDGET & FINANCIAL MANAGEMENT (20 POINTS TOTAL)**

Reviewers shall consider all required elements together and assign **one raw score (0–5)** for this section.

Required Elements	Reviewer Comments
Budget and financial plan	
Additional funding sources, timing, restrictions, and sustainability	
Cost per ride calculation	
Suggested donation and program income handling	
Proposed units, requested award, and match calculation	
Fiscal stability, internal controls, and financial management practices	

**Section Raw Score (0–5): \_\_\_\_ Section Weighted Score (Max 15): \_\_\_\_** (*Raw score ÷ 5 × 15*)

**TOTAL PROPOSAL SCORE**

Section	Max Points	Weighted Score
Organizational Capacity	15	
Service Delivery Plan	20	
Eligibility & Client Rights	15	
Outreach	10	
Data Management & Reporting	10	
Coordination & QA	10	
Budget & Financial Management	20	
<b>TOTAL</b>	<b>100</b>	<b>___ / 100</b>

**ADDITIONAL REVIEWER COMMENTS**

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**Reviewer Recommendation**

☐ Recommend for Award   ☐ Recommend with Conditions   ☐ Do Not Recommend

**Summary Comments / Conditions (if any):**

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**REVIEWER CERTIFICATION**

By signing below, I certify that I have reviewed and scored this proposal independently, objectively, and in accordance with the evaluation criteria and scoring methodology published in the Request for Proposal. I affirm that I have no actual, perceived, or potential conflict of interest with the proposer and that my scoring reflects my independent judgment.

Reviewer Name (Printed): \_\_\_\_\_

Reviewer Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## IIIB TRANSPORTATION — SCORE SHEET INSTRUCTIONS

### 1. General Scoring Guidance

- Reviewers must read the **entire proposal** before assigning any scores.
- Scores must be based **only** on the content submitted in response to **Section 6 – Proposal Submission Requirements**.
- Evaluation focuses on:
  - Responsiveness to required proposal elements
  - Demonstrated capacity to deliver OAA Title IIIB Transportation services
  - Compliance with KDADS Field Support Manual (FSM), Older Americans Act (OAA), and JAAA policy
  - Ability to prioritize and track **medical transportation** consistent with JAAA's 60% target
- Do **not** assume compliance if it is not clearly described.
- All scores **must be supported by written reviewer comments**.

---

### 2. Scoring Scale (Raw Score)

Each evaluation section is assigned **one raw score** using the following scale:

Score	Description
5	Excellent – Fully addresses all requirements with strong detail, clarity, and demonstrated capacity
4	Good – Addresses requirements with minor gaps or limited detail
3	Adequate – Addresses requirements at a basic level
2	Limited – Partially addresses requirements; notable gaps
1	Poor – Minimally addresses requirements
0	Non-responsive – Does not address the requirement

---

### 3. How to Use the Score Sheet Tables

- Each section of the score sheet lists **required elements** to guide reviewer consideration.
- Reviewers shall:
  - Consider **all listed elements together**
  - Assign **one raw score (0–5)** per section
  - Enter **one weighted score** per section
  - Provide **written comments** explaining the score
- Reviewers **do not score each bullet separately** — bullets guide judgment of the **overall section quality**.

---

### 4. Calculating Weighted Scores

Each section has a **maximum point value**.

**Formula:**

$(\text{Raw Score} \div 5) \times \text{Section Maximum Points} = \text{Weighted Score}$

**Example:**

- Raw score: 4
  - Section max: 20 points
  - Weighted score:  $(4 \div 5) \times 20 = \mathbf{16 \text{ points}}$
- 

**5. Section-Specific Evaluation Notes**

**Organizational Capacity (15 points)**

Evaluate experience delivering transportation services, staffing adequacy, governance, and authorized signers.

**Service Delivery Plan (20 points)**

Evaluate ride scheduling, dispatch, participant management, waitlist handling, safety, ADA compliance, incident reporting, and subcontractor oversight.

**Eligibility, Assessment, and Client Rights (15 points)**

Evaluate UPR procedures, expiration tracking, re-registration notifications, and grievance handling.

**Outreach (10 points)**

Evaluate targeted outreach strategies for populations with the greatest economic or social need.

**Data Management and Reporting (10 points)**

Evaluate reporting timeliness, accuracy, trip purpose tracking, waitlist/denied ride tracking, and progress toward the 60% medical transportation target.

**Coordination and Quality Assurance (10 points)**

Evaluate QA systems, customer satisfaction surveys, staff training practices, coordination with JAAA, and use of corrective actions.

**Budget and Financial Management (20 points)**

Evaluate cost per ride calculation, funding sources, match, program income handling, and overall fiscal stability.

---

**6. Final Scoring and Verification**

- The **final proposal score** is the sum of all weighted section scores.
  - Reviewers must verify:
    - All sections are scored
    - Calculations are accurate
    - Comments support scores assigned
- 

**7. Reviewer Certification**

Each reviewer must certify that:

- Scores were assigned objectively
  - No conflict of interest exists
  - Scores are based solely on proposal content
- 

**WORKED SCORING EXAMPLE — IIIB TRANSPORTATION**

### Example Section: Service Delivery Plan (20 Points Maximum)

#### Scenario

The proposer clearly explains how rides are scheduled and dispatched, describes hours of operation and service area coverage, and provides solid procedures for handling cancellations, no-shows, and ride denials. The proposal explains curb-to-curb service, ADA accommodations, vehicle safety, and incident reporting.

The proposer also describes how waitlists are maintained and participants are notified when service becomes available.

However:

- Oversight procedures for subcontracted transportation providers are briefly mentioned but lack detail.
- The description of how services would be adjusted during funding constraints is present but somewhat general.

---

#### Step 1: Assign Raw Score

Consideration	Assessment
Scheduling & dispatch	Fully addressed
Trip management procedures	Fully addressed
Participant & waitlist management	Addressed
ADA & safety compliance	Fully addressed
Subcontractor oversight	Limited detail
Funding-based service adjustments	Some detail

**Raw Score Assigned: 4 out of 5**

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#### Step 2: Apply Section Weight

- Section Maximum: **20 points**
- Raw Score: **4**

#### Calculation:

$$(4 \div 5) \times 20 = 16 \text{ points}$$

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#### Step 3: Document Reviewer Comments

##### Example Reviewer Comments:

The proposal presents a clear and feasible plan for delivering OAA Title IIIB Transportation services, including ride scheduling, dispatch, trip management, ADA accommodations, and vehicle safety procedures. Participant management and waitlist processes are adequately described. Additional detail would strengthen the proposal regarding subcontractor oversight and specific procedures for adjusting service levels during funding or capacity constraints.

---

#### Final Score for This Section

**16 / 20 points**

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## **OAA Funded Transportation Targets Policy**

### **IIIB Transportation Services**

In response needs assessment surveys and review of information inquiries related to requests for rides, Jayhawk Area Agency on Aging will begin targeting the transportation funding provided to community service agencies to rides specific to medical appointments beginning October 1, 2022. Jayhawk Area Agency on Aging will set the following targets in place for transportation services funded through title IIIB and IIIE of the OAA.

**Targets for OAA funded rides provided through JAAA OAA funds will be:**

**60% medical appointments**

**40% general transportation**

Medical appointment rides are defined as rides to and from medical appointments scheduled with a medically licensed practitioner or facility to receive medically necessary care, including diagnostic and treatment services.

The following list of examples is not meant to be all inclusive:

- Vision services
- Hearing services
- Dental services
- Physical Therapy/Occupational Therapy
- Infusion treatment including Dialysis
- Vaccination appointments and clinics
- Lab work
- Diagnostic procedures tests and scans
- Podiatry appointments
- Doctor visits including Primary Care and other Specialists
- Urgent Care visits
- Hospital and Emergency Room visits
- Behavioral Health Care including crisis services
- Trips to the Pharmacy for prescription or OTC medication pick up.

General transportation is defined as rides to and from locations for purposes of meeting needs including shopping, nutrition, fitness, and social connection.

These ride examples are not meant to be all inclusive:

- Trips to retail shops for purposes of purchasing food, or other household supply needs.
- Trips to the Farmers Market
- Trips to retail shops for purposes shopping
- Trips to Senior Centers
- Trips to CHAMPSS Meal sites
- Trips to exercise facilities including gyms and health clubs
- Other social activities including entertainment

Reporting guidelines will change in relation to the new target categories and providers will be required to track the purpose of rides provided under these 4 categories:

- Medical
- Shopping/Basic Needs/Nutrition
- Trips to/from senior center
- Social Activities

## **Jayhawk Area Agency on Aging (JAAA)**

### **OAA Funded Transportation Targets Policy**

#### **Title III-B Transportation Services**

##### **Purpose and Policy Intent**

In response to needs assessment survey results and review of information inquiries related to requests for rides, the Jayhawk Area Agency on Aging (JAAA) establishes medical transportation as the primary service priority for transportation services funded under Title III-B of the Older Americans Act (OAA).

Limited OAA transportation funds are intended to support access to medically necessary care for older adults. This policy establishes transportation service targets that reflect JAAA's programmatic priorities and funding expectations and are intended to guide provider service delivery, monitoring, and funding decisions.

##### **Transportation Service Targets**

Targets for OAA-funded rides provided through JAAA OAA funds are expected to be:

- 60% medical appointment rides
- 40% general transportation rides

These targets are not intended to eliminate access to general transportation. Rather, they are intended to ensure that Title III-B transportation funds are primarily directed toward medically necessary rides, consistent with identified community need and documented service demand.

##### **Definition of Medical Appointment Rides**

Medical appointment rides are defined as rides to and from medical appointments scheduled with a medically licensed practitioner or facility for the purpose of receiving medically necessary care, including diagnostic and treatment services.

The following examples are not intended to be all-inclusive:

- Vision services
- Hearing services
- Dental services
- Physical Therapy and Occupational Therapy
- Infusion treatment, including dialysis
- Vaccination appointments and clinics
- Laboratory work
- Diagnostic procedures, tests, and scans



- Podiatry appointments
  - Doctor visits, including primary care and medical specialists
  - Urgent Care visits
  - Hospital and Emergency Room visits
  - Behavioral health care, including crisis services
  - Trips to a pharmacy for prescription or over-the-counter medication pickup
- 

### **Definition of General Transportation**

General transportation is defined as rides to and from locations for purposes of meeting non-medical needs, including shopping, nutrition, fitness, and social connection.

The following examples are not intended to be all-inclusive:

- Trips to retail locations for purchasing food or household supplies
- Trips to farmers markets
- General shopping trips
- Trips to senior centers
- Trips to CHAMPSS meal sites
- Trips to exercise facilities, including gyms and health clubs
- Other social or recreational activities, including entertainment

### **Required Ride Purpose Tracking**

Providers shall track and report the purpose of all OAA-funded transportation rides using the following categories established by JAAA:

- Medical
- Shopping / Basic Needs / Nutrition
- Trips to or from a Senior Center
- Social Activities

### **Provider Performance Monitoring and Accountability**

JAAA will monitor provider performance against the established transportation targets on a routine basis using submitted reports, billing data, and monitoring reviews.

Providers whose OAA-funded ride distribution materially deviates from the established medical transportation target may be required to:

1. Submit a written explanation documenting rider demand, community need, geographic considerations, or operational constraints;
2. Implement a corrective action plan to realign services with established program priorities; and/or
3. Adjust intake, scheduling, or ride prioritization practices to better support access to medical transportation.

Providers are expected to make good-faith and reasonable efforts to prioritize medical transportation within OAA-funded services. Temporary deviations from the established targets may be permitted when supported by data and approved by JAAA.

### **Funding Implications**

Persistent or unexplained failure to make reasonable efforts to align service delivery with JAAA's established transportation targets may be considered in:

- Contract monitoring findings
- Funding allocation or adjustment decisions
- Contract renewal, modification, or non-renewal determinations
- Future procurement or funding award decisions

JAAA retains discretion to evaluate provider performance holistically, taking into account documented community need, service area characteristics, and operational feasibility.

## **Jayhawk Area Agency on Aging (JAAA)**

### **OAA and SCA Unserved / Underserved Demand Tracking and Reporting Policy**

*(Agency-Wide Program Policy)*

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#### **Purpose**

The Jayhawk Area Agency on Aging (JAAA) is required to identify, track, and report unmet demand for services funded under the Older Americans Act (OAA) and the Kansas Senior Care Act (SCA) in accordance with federal and state requirements.

For reporting purposes, unmet demand may be referred to as a “wait list.” In practice, this tracking reflects individuals or communities that are unserved or underserved due to funding, capacity, or program limitations and does not represent a guaranteed queue or entitlement to services.

This policy establishes a consistent, agency-wide framework for identifying, documenting, and reporting unmet service demand while allowing for program-specific application as outlined in the appendices to this policy.

---

#### **Definitions**

##### **Unserved**

An individual or population with an identified need for an eligible service who is not receiving that service under any funding source at the time of reporting.

##### **Underserved**

An individual or population receiving some level of service, but at a level insufficient to meet assessed need due to funding, service limits, or program constraints.

##### **Wait List**

For OAA and SCA reporting purposes, a “wait list” reflects documented unserved or underserved demand and is used for planning, reporting, and advocacy. Placement on a wait list does not guarantee future service availability.

---

#### **General Principles**

1. Unserved and underserved tracking is a planning and reporting function, not a promise or guarantee of service.
  2. Tracking methodologies may vary by program based on service design, funding structure, and KDADS guidance.
  3. Responsibility for tracking may rest with JAAA or with service providers, depending on the program.
  4. All tracking must be accurate, supportable, and consistent with KDADS reporting requirements.
- 

### **Responsibility for Tracking and Reporting**

JAAA is responsible for ensuring that unserved and underserved demand is accurately identified, documented, and reported to KDADS.

Program-specific responsibility for tracking (JAAA vs. providers), data sources, and reporting methods are detailed in the applicable appendix to this policy.

---

### **Use of Unserved / Underserved Data**

Unserved and underserved demand data may be used by JAAA for:

- KDADS and federal reporting
  - Area Plan development and updates
  - Program planning and service expansion analysis
  - Funding advocacy and justification of unmet need
- 

### **Documentation and Review**

Documentation supporting reported unserved and underserved demand shall be maintained in accordance with JAAA and KDADS record retention requirements and made available for review upon request.

This policy and its appendices shall be reviewed periodically and updated as necessary to remain consistent with applicable laws, regulations, and program guidance.

## **Appendix A — Congregate Meals (OAA Title III-C1)**

**Jayhawk Area Agency on Aging, Inc.**

### **OAA Title III-C1 Congregate Meals**

#### **Waitlist / Unserved Demand Policy**

##### **1. Purpose**

The purpose of this policy is to establish a consistent and compliant process for identifying, documenting, and reporting unserved or underserved demand for OAA Title III-C1 Congregate Meals services, in accordance with the Older Americans Act (OAA) and Kansas Department for Aging and Disability Services (KDADS) requirements.

This policy ensures that Jayhawk Area Agency on Aging, Inc. (JAAA) accurately reports unmet need for Congregate Meals services while clearly distinguishing Congregate Meals waitlist reporting from Home Delivered Meals (Title III-C2) waitlist practices.

This appendix is adopted pursuant to the Jayhawk Area Agency on Aging Unserved / Underserved Demand Tracking and Reporting Policy and provides program-specific guidance for OAA Title III-C1 Congregate Meals.

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##### **2. Definition of Congregate Meals “Waitlist”**

For OAA Title III-C1 purposes, a waitlist does not represent a queue of individuals awaiting authorized services. Instead, the Congregate Meals waitlist reflects documented unserved or underserved demand, including OAA-eligible individuals or communities that are unable to access Congregate Meals services due to systemic barriers.

This waitlist is used for planning, reporting, and advocacy purposes and does not guarantee future service availability.

---

##### **3. What Constitutes Unserved or Underserved Demand**

The following situations may be counted as Congregate Meals waitlist or unserved demand:

- OAA-eligible individuals who are unable to attend an operating congregate meal site due to transportation barriers;

- Geographic areas or communities where congregate meal sites are not currently operating due to funding limitations;
  - Congregate meal sites that are temporarily or permanently closed, resulting in unmet demand;
  - Communities where a need for Congregate Meals has been identified but services cannot be initiated due to insufficient funding, staffing, or facility availability.
- 

#### **4. What Does *Not* Constitute a Congregate Meals Waitlist**

The following situations shall not be counted as Congregate Meals waitlist or unserved demand:

- Individuals who choose not to attend an operating congregate meal site;
  - Individuals who are ineligible for OAA services;
  - Individuals awaiting completion of a Uniform Program Registration (UPR) at an operating site;
  - Individuals who receive Congregate Meals services on a limited or reduced schedule due to personal preference.
- 

#### **5. Individual Eligibility and Registration**

Placement on a Congregate Meals waitlist does not require completion of a Uniform Program Registration (UPR), as no services are being authorized or delivered.

UPRs are completed only when an individual begins receiving Congregate Meals services at an operating site, in accordance with KDADS Field Service Manual requirements.

---

#### **6. Data Collection and Reporting**

Congregate Meals providers shall:

- Maintain documentation supporting the identification of unserved or underserved demand (e.g., community requests, transportation barriers, site closures);
- Report aggregate monthly waitlist/unserved demand numbers to JAAA;

- Submit waitlist data by the end of the last business day of each month for inclusion in KDADS reporting.

Reported data shall reflect counts of unmet demand, not individual authorizations or service commitments.

---

## **7. Use of Waitlist / Unserved Demand Data**

Congregate Meals waitlist data may be used by JAAA for:

- KDADS and federal reporting;
  - Area Plan development and updates;
  - Program planning and service expansion analysis;
  - Funding advocacy and justification of unmet need.
- 

## **8. Coordination and Review**

JAAA reserves the right to:

- Review provider documentation related to reported unserved demand;
  - Request clarification or supporting information;
  - Provide technical assistance to ensure consistent and accurate reporting.
- 

## **9. Policy Review**

This policy shall be reviewed periodically and updated as necessary to remain consistent with KDADS Field Service Manual requirements, OAA regulations, and JAAA program practices

## **Appendix B — CHAMPSS (OAA Title III-C1)**

**Jayhawk Area Agency on Aging, Inc.**

**OAA Title III-C1 CHAMPSS Program**

**Waitlist / Unserved Demand Policy**

---

### **1. Purpose**

The purpose of this policy is to establish a consistent and compliant process for identifying, documenting, and reporting unserved or underserved demand for OAA Title III-C1 CHAMPSS Program services, in accordance with the Older Americans Act (OAA) and Kansas Department for Aging and Disability Services (KDADS) requirements.

This policy ensures that Jayhawk Area Agency on Aging, Inc. (JAAA) accurately reports unmet need for CHAMPSS services.

This appendix is adopted pursuant to the Jayhawk Area Agency on Aging Unserved / Underserved Demand Tracking and Reporting Policy and provides program-specific guidance for the OAA Title III-C1 CHAMPSS Program.

---

### **2. Definition of CHAMPSS “Waitlist”**

For OAA Title III-C1 CHAMPSS purposes, a waitlist represents eligible individuals who have requested participation in the CHAMPSS Program but are unable to be enrolled due to funding, capacity, or program limitations.

This waitlist is used for planning, reporting, and advocacy purposes and does not guarantee future service availability.

---

### **3. What Constitutes Unserved or Underserved Demand**

The following situations may be counted as CHAMPSS waitlist or unserved demand:

- OAA-eligible individuals who meet CHAMPSS eligibility requirements but cannot be enrolled due to funding limitations;
- Individuals who request CHAMPSS participation but cannot be served due to program capacity limits;



- Temporary suspension or limitation of CHAMPSS enrollment due to administrative, staffing, or vendor availability constraints;
  - Individuals who are eligible for CHAMPSS but receive limited participation due to program or funding limitations.
- 

#### **4. What Does Not Constitute a CHAMPSS Waitlist**

The following situations shall not be counted as CHAMPSS waitlist or unserved demand:

- Individuals who are ineligible for OAA services;
  - Individuals who choose not to participate in CHAMPSS after eligibility determination;
  - Individuals awaiting completion of intake steps who have not requested CHAMPSS participation;
  - Individuals removed from the waitlist due to inability to contact after reasonable outreach attempts.
- 

#### **5. Individual Eligibility and Registration**

Eligibility for placement on the CHAMPSS waitlist is limited to individuals who are 60 years of age or older and who reside within Shawnee, Jefferson, or Douglas Counties, Kansas.

Placement on a CHAMPSS waitlist does not require completion of a Uniform Program Registration (UPR), as no services are being authorized or delivered.

UPRs are completed only when an individual begins receiving CHAMPSS services, in accordance with KDADS Field Service Manual requirements.

---

#### **6. Data Collection and Reporting**

Jayhawk Area Agency on Aging, Inc. shall:

- Maintain documentation supporting the identification of unserved or underserved demand (e.g., waitlist requests, enrollment limitations);
- Maintain a centralized CHAMPSS waitlist using standardized intake procedures;

- Report aggregate monthly waitlist/unserved demand numbers for inclusion in KDADS reporting.

Reported data shall reflect counts of unmet demand, not individual authorizations or service commitments.

---

## **7. Use of Waitlist / Unserved Demand Data**

CHAMPSS waitlist data may be used by JAAA for:

- KDADS and federal reporting;
  - Area Plan development and updates;
  - Program planning and service expansion analysis;
  - Funding advocacy and justification of unmet need.
- 

## **8. Coordination and Review**

JAAA reserves the right to:

- Review documentation related to reported waitlist or unserved demand;
  - Request clarification or supporting information;
  - Provide technical assistance to ensure consistent and accurate reporting.
- 

## **9. Policy Review**

This policy shall be reviewed periodically and updated as necessary to remain consistent with KDADS Field Service Manual requirements, OAA regulations, and JAAA program practices.

## Appendix C — Home Delivered Meals (OAA Title III-C2)

### Jayhawk Area Agency on Aging (JAAA)

### Older Americans Act (OAA) Home Delivered Meals

### Unserved / Underserved Demand Tracking Policy and Procedure (HDM Wait List Reporting)

#### Purpose

The Jayhawk Area Agency on Aging (JAAA) is required to track and report Home Delivered Meal (HDM) wait lists to the Kansas Department for Aging and Disability Services (KDADS). This process ensures that JAAA can identify both *unserved* and *underserved* individuals in need of meal services and accurately assess service delivery and funding needs across the region.

This appendix is adopted pursuant to the Jayhawk Area Agency on Aging Unserved / Underserved Demand Tracking and Reporting Policy and provides program-specific guidance for OAA Title III-C2 Home Delivered Meals.

#### Definitions

##### Unserved:

Individuals who need a Home Delivered Meal but are **not currently receiving any meal** under any funding source, including OAA, local government funds, donations, or self-pay.

##### Underserved:

Individuals who are receiving some meal service, but that service does **not fully meet their nutritional needs**. This includes:

- Individuals who need more meals than can be provided under the OAA HDM contract (e.g., receiving 5 meals per week but require 7, or need 2 meals per day).
- Individuals receiving a meal funded **through another source**, such as private pay, city or county funding, community donations, or other non-OAA programs (excluding PACE or HCBS Medicaid paid meals).

#### Reporting Requirements

- Each Home Delivered Meal provider must submit the wait list information to JAAA by the **last business day of each month**.
- JAAA will compile and report totals to KDADS by the **3rd of each month**.
- Reports must be submitted via email to: **reporting@jhawkaaa.org**
- Reports should be submitted in the format provided by JAAA (Excel or PDF).

### Reporting Format

Service	Number of Persons <b>UNSERVED</b> (definition above)	Number of Persons <b>UNDERSERVED</b> (definition above)	Comments regarding service delivery problems or funding problems
HMEL OAA C32			

### Documentation

Providers must maintain documentation supporting reported numbers, including:

- Intake assessments and eligibility forms
- Service delivery records
- Communication logs for individuals on the wait list

This documentation should be retained in accordance with JAAA and KDADS recordkeeping requirements and made available for review upon request.

### Wait List Management Procedures

1. **Eligibility Review:** Confirm that each individual on the wait list meets OAA eligibility criteria for Home Delivered Meals.
2. **Prioritization:** Identify if the individual qualifies under priority categories (e.g., low-income, isolated, or frail).
3. **Follow-Up:** Providers should contact individuals on the wait list bi-annually based on when customer was placed on the wait list to confirm continued need and interest in service.
4. **Resolution:** Once service becomes available, update the wait list to reflect the individual's start date and remove them from the *unserved* or *underserved* count.

### Contact for Questions

For questions regarding this policy, reporting requirements, or data submission, contact: Jayhawk Area Agency on Aging (JAAA) [reporting@jhawkaaa.org](mailto:reporting@jhawkaaa.org).

### Notes

- Ensure consistent use of the *unserved* and *underserved* definitions across all providers.

- Clearly document changes in service status (unserved → served → underserved) to maintain data accuracy.
- Providers are encouraged to communicate any ongoing service delivery or funding barriers in the “Comments” section of their report.

DRAFT

## **Appendix D — In-Home Services (OAA III-B, III-E, and SCA)**

### **Jayhawk Area Agency on Aging (JAAA)**

### **Older Americans Act (OAA) and Senior Care Act (SCA)**

### **In-Home Services Unserved / Underserved Demand Tracking Policy**

*(Wait List Reporting)*

---

#### **Purpose**

The Jayhawk Area Agency on Aging (JAAA) is responsible for identifying, tracking, and reporting unmet demand for OAA- and Senior Care Act-funded in-home services to the Kansas Department for Aging and Disability Services (KDADS).

For reporting purposes, KDADS may refer to this unmet demand as a “wait list.” In practice, this tracking reflects individuals who are **unserved or underserved** due to funding, capacity, or program limitations and does not represent a guaranteed queue for services.

This process ensures that JAAA can accurately assess unmet service needs, comply with state and federal reporting requirements, and support program planning and funding decisions.

This appendix is adopted pursuant to the Jayhawk Area Agency on Aging Unserved / Underserved Demand Tracking and Reporting Policy and provides program-specific guidance for OAA Titles III-B and III-E and Senior Care Act in-home services.

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#### **Services Covered by This Policy**

This policy applies to the following OAA and SCA in-home services administered by JAAA:

- **Attendant Care** (OAA Title III-B, III-E, and SCA)
  - **Homemaker Services** (OAA Title III-B, III-E, and SCA)
  - **Personal Emergency Response Systems (PERS)** (SCA)
  - **Respite Care** (OAA Title III-E)
  - **One-Time Purchases** (SCA)
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## Definitions

### Unserved

Individuals who need an eligible in-home service but are **not currently receiving that service under any funding source**, including OAA, SCA, local funds, donations, private pay, or other non-Medicaid programs.

### Underserved

Individuals who are receiving some level of in-home service, but that service **does not fully meet the assessed need** due to funding, service limits, or program constraints. This includes, but is not limited to:

- Individuals authorized for fewer hours or units than assessed as necessary;
- Individuals receiving services funded through alternative non-OAA or non-SCA sources due to exhaustion of OAA or SCA funds;
- Individuals receiving temporary or partial services when ongoing or expanded services are needed.

### Definition of In-Home Services “Wait List”

For OAA and SCA in-home services, a wait list reflects documented unserved or underserved individuals whose service needs cannot be fully met at the time of reporting due to funding or program capacity limitations.

This reporting does not guarantee service availability and is used solely for required KDADS and federal reporting, planning, and advocacy purposes.

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### Responsibility for Wait List Tracking

Jayhawk Area Agency on Aging (JAAA) is solely responsible for:

- Identifying individuals who are unserved or underserved for OAA and SCA in-home services;
- Maintaining records and documentation related to unmet service demand;
- Compiling and reporting aggregate unserved and underserved data to KDADS.

In-home service providers are not responsible for maintaining, tracking, or reporting wait list or unserved/underserved data under this policy.

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## **Data Collection and Reporting**

JAAA shall:

- Maintain internal records documenting unserved and underserved demand for covered in-home services;
- Compile aggregate unserved and underserved counts in accordance with KDADS reporting requirements;
- Submit required reports to KDADS within established reporting timelines.

Reported data shall reflect unmet service demand and shall not be construed as individual service authorizations or commitments.

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## **Documentation**

JAAA shall maintain documentation supporting reported unserved and underserved counts, including but not limited to:

- Intake assessments and eligibility documentation;
- Care plans and service authorization records;
- Internal wait list or tracking records;
- Communication logs related to service requests, funding limitations, or service changes.

Documentation shall be retained in accordance with JAAA and KDADS recordkeeping requirements and made available for review upon request.

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## **Unserved / Underserved Management Procedures**

### **1. Eligibility Review**

JAAA shall confirm that individuals included in unserved or underserved counts meet eligibility requirements for the applicable OAA or SCA in-home service.

### **2. Prioritization**

JAAA shall identify priority populations consistent with OAA and SCA requirements, including individuals with the greatest economic or social need.



### 3. **Follow-Up**

JAAA shall conduct periodic follow-up with individuals identified as unserved or underserved to confirm continued need and interest, consistent with internal procedures.

### 4. **Resolution**

When services become available or service levels increase to meet assessed need, JAAA shall update records and remove individuals from unserved or underserved counts as appropriate.

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#### **Clarification on Funding Exhaustion and Mixed Funding**

- Individuals who continue to receive services funded through non-OAA or non-SCA sources due to exhaustion of OAA or SCA funds shall be reported as underserved, not served, for reporting purposes.
- Individuals who receive no in-home services under any funding source shall be reported as unserved.

This clarification ensures consistent reporting and accurate documentation of unmet service needs.

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#### **Notes**

- Unserved and underserved tracking is a reporting and planning function, not a promise or guarantee of service.
- Changes in service status (unserved → underserved → served) must be clearly documented to maintain data accuracy.
- This policy does not alter provider service obligations under existing contracts.

## **Appendix E — Disease Prevention and Health Promotion Services (OAA Title III-D)**

### **Jayhawk Area Agency on Aging (JAAA)**

#### **OAA Title III-D Disease Prevention/Health Promotion**

#### **Unserved / Underserved Demand Tracking Policy**

*(Wait List Reporting)*

##### **Program Overview**

This appendix is adopted pursuant to the Jayhawk Area Agency on Aging Unserved / Underserved Demand Tracking and Reporting Policy and provides program-specific guidance for OAA Title III-D Disease Prevention and Health Promotion services.

OAA Title III-D Disease Prevention and Health Promotion services support evidence-based and evidence-informed programs designed to promote healthy behaviors, prevent chronic disease, and improve health outcomes for older adults.

Services may include, but are not limited to, health education, physical activity programs, chronic disease self-management, falls prevention, and other approved health promotion activities.

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##### **Definition of Unserved or Underserved Demand**

For OAA Title III-D purposes, unserved or underserved demand reflects eligible individuals or populations who are unable to participate in available disease prevention and health promotion activities due to funding, capacity, geographic, scheduling, or program limitations.

Because Title III-D services are typically group-based, time-limited, or event-based, unserved or underserved demand may be identified at either the individual or community level.

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##### **What Constitutes Unserved or Underserved Demand**

The following situations may be counted as Title III-D unserved or underserved demand:

- Communities or geographic areas where approved Title III-D programs are not available due to funding or capacity limitations;

- Eligible individuals who are unable to enroll in a scheduled Title III-D program due to class size limits or enrollment caps;
  - Individuals who are unable to participate due to transportation barriers when alternative delivery options are unavailable;
  - Identified demand for evidence-based or evidence-informed programs that cannot be initiated or expanded due to funding, staffing, or contractor availability constraints.
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### **What Does Not Constitute Unserved or Underserved Demand**

The following situations shall not be counted as Title III-D unserved or underserved demand:

- Individuals who choose not to participate in available Title III-D programs;
  - Individuals who are ineligible for OAA services;
  - Individuals who decline participation due to personal preference or scheduling conflicts when alternative opportunities are available.
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### **Responsibility for Tracking**

Jayhawk Area Agency on Aging (JAAA) is responsible for identifying, documenting, and tracking unserved or underserved demand for OAA Title III-D services.

Title III-D service providers are not responsible for maintaining or reporting wait list or unserved/underserved data unless otherwise directed by JAAA for specific program evaluation purposes.

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### **Data Use and Reporting**

Unserved or underserved demand data for Title III-D services may be used by JAAA for:

- KDADS and federal reporting, as applicable;
- Area Plan development and updates;
- Program planning and identification of service gaps;
- Funding advocacy and justification of unmet health promotion needs.

Due to the nature of Title III-D services, reported data may be descriptive or aggregate rather than individual-level counts.

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### **Documentation and Review**

JAAA shall maintain documentation supporting identified unserved or underserved demand, which may include community requests, enrollment data, program capacity limitations, or planning assessments.

This appendix shall be reviewed periodically and updated as necessary to remain consistent with OAA requirements, KDADS guidance, and JAAA program practices.