

**Package for
TITLE IIIB
Legal Assistance Services**

**Terms of Contract
July 1, 2026– June 30, 2027
July 1, 2027 – June 30, 2028
July 1, 2028 – June 30, 2029**

**Funding Source:
Older Americans Act Title III B**

**Lincoln Trail Area Development District
Area Agency on Aging
750 S Provident Way
Elizabethtown, KY 42701
Phone: (270) 769-2393
Fax: (270) 769-2993**

**Contact Person:
Sue Greenwell
Director, Area Agency on Aging and Independent Living**

The Lincoln Trail Area Development District does not discriminate on the basis of race, color, national origin, sex, sexual orientation, gender identity, age, religion, or disability, and provides, upon request, reasonable accommodation including auxiliary aids and services necessary to afford an individual with a disability an equal opportunity to participate in all services, programs, and activities of the agency.

INTRODUCTION

The Lincoln Trail Area Development District (LTADD), Area Agency on Aging is seeking proposals to provide services under multiple funding sources in the Lincoln Trail service area. This proposal is for Legal Assistance Services. It is not issued as a competitive bid due to the sole source identification through the Lincoln Trail Area Development District.

Legal Assistance services are identified in the Older Americans Act as a part of Title IIIB Supportive Services.

1. Providers shall be responsible for utilization of funds for this service. Efforts to recruit participants, service planning, recruitment and training of volunteers and overall management of the operation should be detailed in this proposal.
2. Providers shall be required to deliver services Monday through Friday (unless specified otherwise) with the exception of holidays, inclement weather days, and days for required training, approximately 240 days per fiscal year. Please utilize attached form indicating holidays observed by your agency.
3. The provider shall be responsible for assuring adequate match for funds received. Program income cannot be used for match and must only be used to expand services.

Legal Assistance service priorities for this District are targeted to services for individuals who are low income and minority participants. Providers shall indicate their plans to focus on increasing participation from this population.

Instructions for Submitting Proposal

The proposal shall specify one unit cost per service for the three-year period. A unit cost submitted on a sliding scale shall not be accepted.

Unit definitions are in measurements of one hour of funded services. Federal definitions for Title III measure a unit as one hour of service.

Applicants shall declare their unit costs as noted on the Firm Fixed Price quotation page.

Applicants will submit an original, unbound hard copy of the proposal and one electronic copy. The hard copy shall contain original signatures. The application shall be submitted in a ring binder, copied on one side only and contain all components of the electronic copy, and anything not included in the electronic copy. The original shall be clearly marked as "Original" and signed.

The proposals shall be directed to Sue Greenwell, Director, Area Agency on Aging and Independent Living, LTADD at: sue@ltadd.org.

LINCOLN TRAIL AREA DEVELOPMENT DISTRICT/AREA AGENCY ON AGING

TITLE IIIB Legal Assistance Services

July 1, 2026 – June 30, 2027

July 1, 2027 – June 30, 2028

July 1, 2028 – June 30, 2029

Name and Address of Provider:		
Area Code:	Telephone:	Email:
Name, Title, and Address of Contact Person:		
Area Code:	Telephone:	Email:
Agency Type: Please check as appropriate.		
<input type="checkbox"/> Private Non-Profit		
<input type="checkbox"/> Private For Profit		
<input type="checkbox"/> Public		

FIRM FIXED PRICE QUOTATION

NAME OF PROVIDER: _____

The above named applicant submits a unit cost proposal for the services to be provided as described in the General Information document provided with this solicitation.

\$_____ per unit
(state in terms of dollars and cents)

Unit definitions are in measurements of one hour of funded services. Federal definitions for Title III measure a unit as one hour of service.

I certify that the proposal price shown shall remain firm throughout the contract term, subject only to adjustments as allowable in the LTADD Policy and Procedure, Procurement.

NAME: _____

TITLE: _____

SIGNATURE: _____
(Original Signature)

Date: _____

TERMS AND CONDITIONS FOR OFFICIAL APPLICATION

Terms and Conditions: It is understood and agreed by the undersigned that:

Funds contracted as a result of this request are to be expended for the purposes set forth herein and in accordance with all applicable laws, regulations, policies and procedures of this state and the Administration on Aging of the U.S. Department of Health and Human Services.

Any revisions in this proposal package as approved shall be submitted in writing by the applicant and subject to approval by the Lincoln Trail Area Development District/Area Agency on Aging and shall be deemed incorporated into and shall become a part of this agreement.

Funds awarded by the Lincoln Trail Area Development District/Area Agency on Aging may be terminated at any time for violations of any term and/or provisions of this agreement.

Name and Title of individual authorized to commit application organization to this agreement.

Signature _____ Title _____ Date _____

ATTEST _____ Title _____ Date _____

PROVIDER ASSURANCE

The provider assures that they have reviewed the Administrative Regulations, DAIL Standard Operating Procedures, and the LTADD Policy and Procedures Manual.

Signature: _____ Title: _____ Date: _____

Applicant (type or print)

Street Address

City State Zip

BACKGROUND HISTORY AND FINANCIAL INFORMATION

The provider shall give a background description of the history of the agency or organization and provide evidence that the applicant has a license to operate or can obtain one. The applicant shall provide a copy of its Articles of Incorporation or other documents establishing its legal organization or existence. Pursuant to KRS 45A.480 (1)(b), foreign entities shall submit a copy of their certificate with their solicitation response.

The provider shall provide a copy of its most recent financial statement. The provider shall submit evidence of its capability to ensure proper planning, management, preparation, and delivery of Title IIIB Legal Assistance Services.

Instructions

Submit a background description of the history of the agency or organization.

Submit evidence of a valid license to operate.

Submit a copy of the Articles of Incorporation or other document(s) establishing the applicant's legal organization and existence.

Submit most recent financial statement.

Assure and certify applicant's capability to ensure proper planning, management, and delivery of Transportation services.

COMPLIANCE WITH CODES AND REGULATIONS

The applicant shall be capable of complying with the federal, state and local regulations of which apply to Legal Assistance service operations. The applicant shall provide documentation of such compliance.

Instructions

Submit evidence that the applicant shall comply with the federal, state and local regulations applicable to the Legal Assistance Service provision.

INSURANCE

The applicant shall provide assurance of availability of comprehensive general liability insurance. This insurance shall cover all claims of injury or illness to staff and participants and the general public that might be attributed to the Provider.

Instructions

Provide documentation that it shall obtain comprehensive general liability insurance.

PERSONNEL

Each applicant shall assign, at a minimum, the following personnel for the Legal Assistance Service Program:

Applicant shall appoint and identify a contact person knowledgeable of all program operations who shall be available to LTADD for handling problems and answering questions that may arise.

The applicant shall include a complete description of staffing. This shall be defined on an organizational chart that explains positions by job titles and lines of authority. Qualifications for each staff person shall be included. Applicant shall develop a plan to assure retention of quality staff.

Instructions

Note the identified staff person on the Staffing Plan form included in the General Instructions packet.

Attach a resume for each person identified.

Submit an organizational chart that explains positions by job titles and lines of authority. Applicant shall develop a plan to assure quality of staffing and retention of employees.

TRAINING AND ON-SITE VISITS

The applicant shall submit an outline of the agency's orientation, and in-service training to be provided to staff and volunteers and shall state frequency and type.

Interoffice meetings shall be considered training only when actual programmatic information is disseminated.

Instructions

Submit a training plan (stating frequency and type) that shall be provided to staff and volunteers. Provide assurance that training topics shall be submitted to LTADD for approval prior to implementation, if they are not a part of required training or ongoing continuing education through the Kentucky or Federal funding/licensing sources.

MONITORING REQUIREMENTS

The successful applicant shall monitor service delivery. Monitoring shall be conducted periodically and results submitted to LTADD upon completion. Applicant shall identify the staff person who shall do the monitoring, and describe how it is to be conducted.

The applicant shall allow LTADD representatives to monitor annually other aspects of the program as deemed by LTADD to be necessary. LTADD shall monitor all aspects of the program at any given time throughout the contract period.

Instructions

Describe the procedures for monitoring. Identify the staff person who shall conduct the monitoring and describe how it is to be done.

Submit assurance that monitoring shall be conducted quarterly and results submitted to LTADD upon completion.