



**Title III-B
Older Americans Act
Legal Services**

**Request for Proposal
For Contracting Period January 1, 2027 – December 31, 2030**

Area Agency on Aging 3
2423 Allentown Road Lima,
Ohio 45805

Phone: 419-222-7723
Web: www.aaa3.org

Serving the counties of:
Allen, Auglaize, Hancock, Hardin, Mercer, Putnam and Van Wert

Date RFP Publicized: April 13, 2026

Requests for Proposals are due by 12:00 pm on May 15, 2026
No proposals will be accepted after this time.

Applicants will be notified in writing of approval or denial of program funding by Friday, July 31, 2026.

For More Information Contact:
rfp@psa3.org

Title III B Legal Services Program

Legal assistance provided under [Title III-B](#) is part of the essential core of Area Agency on Aging 3's legal assistance and elder rights programs. The Title III-B legal services network can provide important assistance for older persons in accessing long-term care options and other communitybased services. Legal services under Title III-B also protect older persons against direct challenges to their independence, choice, and financial security. These legal services are specifically targeted to "older individuals with economic or social needs."

INTRODUCTION

In accordance with the Older American's Act of 1965 and Regulations thereto, the Area Agency on Aging 3 (AAA3) is the designated agency serving the Ohio Counties of Allen, Auglaize, Hancock, Hardin, Mercer, Putnam, and Van Wert. AAA3 is responsible for administering federal and state-funded programs and services for individuals aged 60 and older within the designated service as noted above. Older Americans Act Programs and Services are designed to assist older persons in leading independent, meaningful and dignified lives in their own homes and communities as long as possible.

SERVICE PRIORITIES

Services are targeted to those older individuals (age 60 and over) who reside in rural areas, have the greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas), who have the greatest social need, who have severe disabilities, who have limited English proficiency, individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals), and individuals at risk for institutional placement.

GEOGRAPHIC REGION

The Older Americans Act requires AAA3 to set specific objectives for providing services to older individuals (age 60 and over) with the greatest need. For this service that includes medically underserved, economic need, and the minority population in Allen, Auglaize, Hancock, Hardin, Mercer, Putnam and Van Wert counties.

MEDICALLY UNDERSERVED AREAS

Medically Underserved Areas (MUA) may be a whole county or a group of contiguous counties, a group of county or civil divisions or a group of urban census tracts in which residents have a shortage of personal health services. Those areas include (as set by Health Resources and Services Administration under the U.S. Department of Health and Human Services):

Allen County

- Southside Lima (MUA/P 07175) (CT 0134, CT 0136, CT 0137, CT 0138)
- North Lima (MUA/P 07665) (CT0110, CT0112, CT0122, CT0124, CT0141)

Hardin County

- Hardin Service Area (MUA/P 02641)
- Hale Service Area (MUA/P 02693)
- Roundhead Service Area (MUA/P 02694)

Putnam County

- Putnam Service Area (MUA/P 02624)

Van Wert County

- Low-income Van Wert County municipality (MUA/P 07731)

CONSUMER CONTRIBUTIONS

Older Americans Act, Section 374, states that funds may not be used to supplant or replace other sources of funds (maintenance of effort). This means that existing services like those proposed in the Older Americans Act application must be maintained through other sources of funds.

Although participants may voluntarily contribute to the services, cost sharing is not applicable. Individuals who decline to contribute cannot be denied service for inability or unwillingness to contribute. All contributions obtained by the project must be used to expand program services.

PROVIDER PROPOSAL REVIEW CRITERIA

Under 45 C.F.R. 74.43 or 45 C.F.R. 92.36, when procuring a service that is reimbursed with Older Americans Act funds, AAA3 shall select the provider by using a competitive bidding process that offers to the maximum extent practical, open and free competition. To ensure compliance with this rule, AAA3 has developed a competitive bidding process, **where one provider will be selected**.

Submitted Provider Proposals will be scored utilizing the attached service specific addendum A.

All submitted proposals undergo the following protocol:

1. Eligible proposals are reviewed and scored by a Review Committee of AAA3 team members.
2. Results of the review will be presented to the AAA3 Advisory Council for consideration of award.
3. The provider selection recommendations from the Advisory Council, are then presented and reviewed by the AAA3 Board of Trustees, with a final decision made regarding which providers are awarded contracts.

4. AAA3 staff will notify providers who submitted proposals, whether they were awarded contracts or denied.

REVIEW OF EXCLUSIONARY DATABASES

AAA 3 will not enter into a provider agreement with any provider that the Office of Inspector General or System for Award Management (SAM) database lists as excluded or disqualified from agreements involving federal funds. All providers are required to furnish a copy of a database check as a part of the required elements for your organization's proposal. The databases can be accessed by the public for free at:

Office of Inspector General <https://exclusions.oig.hhs.gov/SearchResults.aspx>
System for Award Management (SAM) www.sam.gov.

USE OF FUNDING AND GRANT PERIOD

Funding for the following services is being awarded through Title III of the Older Americans Act. Funds will be available January 1, 2027 through December 31, 2030.

Award Recipients of per unit services will be required to contribute a match of a minimum of fifteen (15%) percent of the project's total cost. The applicant's match contribution must be from non-federal sources.

Due to the multi-year term of the proposal and subsequent provider agreement, providers may anticipate an annual increase of 2% each year beginning in 2028. In the event funding availability changes, the Area Agency on Aging 3 may amend any funding award to reflect such changes.

Pursuant to the 1992 reauthorization of the Older Americans Act, funds are included for legal services. Legal services under Title III-B also protect older persons against direct challenges to their independence, choice, and financial security. These legal services are specifically targeted to "older individuals with economic or social needs." Areas of legal assistance provided by the Title III-B legal services network include:

- Legal assistance for older adults to access public benefits (including SS/SSI/SSDI, Medicaid and Medicare, veterans benefits and unemployment compensation)
- Legal assistance for older persons to draft advance directives and designate surrogate decision makers who will effectuate their wishes if they become incapacitated.
- Legal assistance on issues related to guardianship with a focus on representation for older persons who are the subject of guardianship actions.
- Legal assistance for older persons to access available housing options, including low-income housing programs that allow them to stay independent in their homes and communities.

- Legal assistance for older persons to gain access to the full benefit of appropriate long-term care private financing options.
- Legal assistance of older persons to maintain their long-term financial solvency and economic security.
- Legal assistance to ensure elder rights protections for older persons transferring from long-term care (LTC) facilities to home and community-based care.
- Legal assistance for older persons who have experienced elder abuse, including consumer fraud and the financial exploitation of older persons.

REPORTING REQUIREMENTS

Successful bidders will be required to report monthly service delivery to the Area Agency on Aging 3 on the report provided to them.

Successful bidders should identify 2-3 performance measures/outcomes to be reported annually at the conclusion of each calendar year.

PROPOSAL REQUIREMENTS:

A. SERVICE DESCRIPTION

- Describe your organization's purpose, mission, operation and submit primary contact, business address, telephone number and e-mail address.
- Include a description of your current service and the legal services your organization plans on providing through the available funding.
- Describe your organization's staff that will be working directly with clients to provide this service. Include their background, training and/or credentialing. Are they employees of your agency or participating through a cooperative relationship with another agency.
- Describe how your organization will handle client registration and verification of eligibility procedures for this service. How will your organization monitor the proposed service and obtain client feedback?
- Discuss what areas (cities, towns, villages) of the county will be served. Describe any barriers your organization has in serving any part of the county.
- Discuss what the proposed service will include and in what type of setting it will be offered.

- Discuss any cooperative relationships fostered to increase or expand the services.
- Describe how you will provide follow-up to clients receiving this service.
- Include a budget page, which itemizes the costs that comprise a total bid price for this service.
- An explanation of how your agency or organization complies with 45 U.S.C. 3026 (B), in providing services to the populations identified under Service Priorities on page 2 of the RFP.

Please include the following:

- a. Specify how your agency intends to satisfy those persons' service needs;
- b. How your agency will provide services to those persons; and
- c. How your agency will meet AAA 3's specific objective for providing services to those persons.

B. ORGANIZATIONAL INFORMATION

- 1) Proof that your organization is currently registered with the secretary of state as a non-profit organization, association, or trust, a co-operative, or, a for-profit business, limited liability company, limited partnership, or partnership having limited liability.
- 2) Submit a written statement of agreement to comply with nondiscrimination laws, federal wage and hour laws, and workers' compensation laws in the recruitment and employment of individuals.
- 3) Evidence of Insurance Coverage
 - a. Evidence of at least one million dollars of commercial liability insurance coverage
 - b. Evidence of insurance coverage for consumer loss due to theft or property damage
 - i. A written procedure describing the step-by-step instructions a consumer may follow to file a claim.

- 4) Results of exclusionary databases through Office of Inspector General and System for Award Management.

PROPOSAL SUBMISSION

A Bidder's Conference will be held April 20, 2026 at 10:00 am at which time the process will be reviewed and questions addressed. This meeting may be accessed through the following link. <https://meet.goto.com/328181437>

Proposal deadline is 12:00 PM on May 15, 2026

All proposals received will receive a Proposal Receipt Notice indicating that AAA3 has received your proposal and the date/time received at our office.

Any proposals received after the deadline, will be sent a proposal receipt notice indication the applicant had missed the deadline, and would not be considered for the funds offered.

Only proposals received through the following link will be accepted. [Complete Submission](#)

Provider Application Scoring Sheet
Legal Services

Category	Points Available	Scoring Methodology	Points Awarded
Complete Application	10	10=complete application 0=incomplete application	
Counties to Serve	25	All of 7 county area = 25 points 6 counties = 20 5 counties = 15 4 counties = 10 3 counties = 5 1 or 2 counties = 0	
Matching funds	25	Highest amt. of matching funds or tie = 25 points 2 nd highest = 20 points 3 rd highest = 15 points 4 th highest = 10 points 5 th highest = 5 points 6 th highest = 0 points	
Service Quality: Prior Experience providing legal services under Title III	10	Previous experience = 10 points No experience = 5 points	
Service Quality: Explanation included regarding how agency intends to comply with 45 U.S.C. 3026(B)	10	Tracking practices in place = 10 Plan in place to comply = 5 No plans = 0	
Service Quality: Description of how your organization will handle client registration and verification of eligibility.	10	Description included = 10 Description not included = 0	

Service Quality: Description of how the agency is monitoring service and obtaining client feedback.	10	75% + = 10 points 50-74% = 5 points 49 – 0% = 0 points	
Service Quality: Description of the proposed service, and in what setting it will be offered.	10	Ability to provide service in a setting in each of: 7 counties = 10 points 6 counties = 7 points 5 counties = 4 points 4 counties = 2 points 3 or less counties = 0 points	
Service Quality: Description of any cooperative relationships fostered to increase or expand the service.	10	Description included = 10 Description not included = 0	
Service Quality: Description of how follow up services will be provided to consumers	10	Face to face follow up = 10 points Paper only follow up = 5 points	
TOTALS	140		