

**EVALUATION CHECKLIST  
AND REQUIREMENTS  
FOR TITLE III GRANT PROJECTS**

Please review the Policy and Procedure Manual for Title III Grants and the Request for Proposals for more information and details on grant requirements found at [www.SWCAA.org](http://www.SWCAA.org) Funding Opportunities pages.

**Eligibility Benchmarks** - *Applicant MUST be able to meet each benchmark to be eligible to apply.* Applicant is a:

- public agency,
- incorporated private 501(c)3 non-profit agency, or
- private for-profit agency. (Before awarding grants to for-profit agencies, SWCAA must obtain approval from the State Unit on Aging.)

\_\_\_\_\_ Applicant is in good standing with the office of the Connecticut Secretary of State

\_\_\_\_\_ Applicant is not debarred or suspended for Federal or State contracts

\_\_\_\_\_ A recent audit, financial statements from a Certified Public Accountant, or an IRS Form 990 is available to submit to SWCAA. **Please see the Policy and Procedure Manual for Title III Grants for further details about this requirement.**

\_\_\_\_\_ Clients served will be 60 years of age or older

\_\_\_\_\_ Applicant will be able to serve a significant number of target population seniors

\_\_\_\_\_ Clients/services will be from/in SWCAA 14-town area

\_\_\_\_\_ Non-federal matching resources will be available to support the project budget in at least the percentage required

\_\_\_\_\_ Requested Title III funds will supplement, not supplant, Federal, State, or local funds

**MIS Services** – *Refer to the Service Definitions lists for the Title of the Older Americans Act under which you are requesting funds. Only the services described there may be funded with Title III funds. Utilize those definitions to determine which service or services you will provide with Title III funding. The units listed are the ones that must be reported. If you are unsure which services to choose, please contact the SWCAA grants manager for assistance.*

**Other Title III Requirements for Grantees**

- Monthly invoicing and service delivery reporting (MIS) is required by Grantees. This includes regular collection of demographic information for each new client served by the project and submitting the units of service provided to all clients through SWCAA’s on-line data portal, Grantee Gateway.
- Mid-year on-site or virtual visit with members of the SWCAA Board of Directors, Advisory Council, and staff
- Affirmative Action Plan including signed Vendor’s Statement
- Signed Standard Assurances
- Client Grievance Procedure
- Certificate of liability insurance naming SWCAA as additional insured
- Voluntary Contribution Procedure. Providing an opportunity for clients to make voluntary contributions to the funded project is a requirement of Title III funding.

Charging a fee is prohibited. Contributions must remain confidential and client services may not be based on ability to contribute. These contributions may not be used as match. All contributions must be used to expand services to clients.

- Provision of a process to provide information and referrals to assist clients in taking advantage of benefits under other programs.