



# Area Agency on Aging, Inc.

SPECIALISTS IN AGING

## REQUEST FOR PROPOSALS

### Project Management for Friendly Helper Program

#### Overview

Region IV Area Agency on Aging (RIV AAA) has been awarded a Community Care Corps (CCC) grant to launch and expand its Friendly Helper Program (FHP). The FHP aims to address Health-Related Social Needs (HRSNs) such as social isolation, transportation, food security, emergency preparedness, and caregiver respite for older adults, individuals with disabilities, and caregivers in Berrien, Cass, and Van Buren counties in Southwest Michigan.

RIV AAA seeks proposals from qualified project management consulting firms to design, establish, and refine the operational structure of the FHP, aligning closely with the CCC grant objectives, leveraging existing technology platforms (Mon Ami and Tualta), and ensuring scalability and sustainability as described in the approved grant work plan, concluding September 30, 2026.

**Project Objectives & Outcomes** – The selected consultant will support RIV AAA to achieve the following measurable outcomes:

- At least 90% of participants report improved independence, quality of life, and reduced social isolation.
- At least 90% of caregivers report reduced stress and improved capacity to sustain caregiving responsibilities.
- Volunteer retention rate of at least 85%, with at least 75 volunteers recruited, onboarded, and trained by September 30, 2026.
- Successful implementation of operational and training systems (Mon Ami and Tualta).

**Scope of Work** – The selected consulting firm will be responsible for:

- **Program Design & Operational Setup**
  - Develop detailed workflows, policies, and procedures covering volunteer onboarding, orientation, training, safety guidelines, minor home repairs and transportation (including volunteer mileage reimbursement), data privacy, and reporting protocols.
  - Operationalize of Mon Ami (electronic social care platform) functionalities for volunteer onboarding, matching, and activity tracking.
  - Develop and deployment of customized volunteer training modules via the Tualta online caregiver learning management platform.
  - Conduct pilot testing and refine systems for operationalization of Mon Ami and Tualta platforms for use by Friendly Helper program.
- **Implementation and Evaluation**
  - Monitor implementation progress; ensure continuous quality improvement.
  - Design and implement volunteer and participant (care recipient and caregiver) satisfaction surveys.



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- Develop actionable dashboards and periodic reporting schedule and tools for continuous quality improvement.
- **Strategic Recommendations**
  - Provide strategic recommendations supporting sustainability beyond the grant period.

**Proposal Requirements** – Proposals must include:

- 1. Profile – Experience & Qualifications**
  - Brief history and description of the firm.
  - Relevant project management experience, particularly in volunteer-based or aging services programs.
  - Resumes or bios of key personnel assigned to this project.
- 2. Project Approach & Methodology**
  - Detailed description of proposed approach, methodologies, and deliverables.
  - Clear timeline and milestones aligned with the adjusted project period ending 9/30/26.
- 3. Budget & Pricing**
  - Detailed budget, including hourly rates and estimated hours by task.
  - Clearly identify any anticipated additional expenses.
- 4. References**
  - At least three references from similar projects conducted within the last five years.
- 5. Attachments (optional but recommended)**
  - Summaries or examples of relevant prior projects
  - Samples of previous workflow and policy development documents

**Selection Criteria** – Proposals will be evaluated based on:

- Demonstrated expertise and experience in project management within community-based volunteer or aging services.
- Clear understanding and responsiveness to RIV AAA's objectives and adjusted timeline.
- Quality and clarity of proposed approach, methodology, and alignment with the adjusted project schedule.
- Reasonableness and clarity of proposed budget.

## Reporting & Accountability

The selected firm will be expected to submit monthly progress reports detailing accomplishments, challenges, and planned next steps. Quarterly evaluations against project milestones and outcomes are also required.

## Timeline

- **RFP Release Date:** May 19, 2025
- **Proposal Submission Deadline:** June 9, 2025
- **Consultant Selection & Notification:** June 16, 2025



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

**S P E C I A L I S T S   I N   A G I N G**

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- **Project Kick-Off:** June 23, 2025

**Submission Instructions** – Proposals should be submitted electronically as one PDF document to:

**Mistelle Lanko**  
**Volunteer & Senior Engagement Manager**  
**Region IV Area Agency on Aging**  
[mistellelanko@areaagencyonaging.org](mailto:mistellelanko@areaagencyonaging.org)  
**Subject Line: Friendly Helper Project Management Proposal**

**Contact Information** – For questions regarding this RFP, please contact:

**Mistelle Lanko**  
**269-982-7734**  
[mistellelanko@areaagencyonaging.org](mailto:mistellelanko@areaagencyonaging.org)

**Region IV AAA reserves the right to reject any or all proposals or portions thereof and to negotiate with the selected firm for amendments or additional requirements.**