



Senior Care Outreach

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FINANCIAL ASSISTANCE POLICY

1. Purpose & Scope

The mission of Senior Care Outreach ("the Organization") is to provide financial assistance to seniors who require non-medical in-home care but lack the financial resources to pay for such services. This policy establishes the criteria and procedures for awarding these care grants.

2. Charitable Class (Who We Serve)

To be eligible for assistance, an applicant must:

- Be 65 years of age or older.
- Reside within Pinal County or Maricopa County, AZ].
- Demonstrate a physical or cognitive need for "non-medical" support (e.g., assistance with activities of daily living like meal prep, cleaning, or transportation).
- Fall within the Financial Eligibility guidelines as defined in Section 3.

3. Financial Eligibility Criteria

The Organization uses a "Needs-Based" model to allocate funds. Eligibility is determined by:

- **Income Threshold:** Household income must be at or below 150% of the Federal Poverty Level (FPL).
- **Asset Consideration:** While primary residences and one vehicle are excluded, significant liquid assets (savings, stocks) may be considered in the evaluation.
- **Family Financial Support Consideration:** Financial support from family, along with the income of family members offering assistance, may be considered in the evaluation.
- **Underinsured Status:** Preference is given to seniors who do not qualify for Arizona Long Term Care System (ALTCS) or who are on a waitlist for state-funded services.

4. Application & Selection Process

- Objective Review: All applications are reviewed by a Selection Committee comprised of at least three individuals.
- Nondiscrimination: Assistance is granted without regard to race, religion, gender, sexual orientation, or national origin.
- Prioritization: If demand exceeds available funding, applicants are prioritized based on:
 1. Highest level of physical/safety risk.
 2. Lowest household income.
 3. Lack of existing family support or "informal" care.

5. Method of Distribution

- Direct Vendor Payment: The Organization does not provide cash directly to seniors.
- Approved Providers: Funds are paid directly to the Organization's partner home care agencies upon receipt of a verified invoice and care log.
- Grant Caps: Individual grants are typically capped at \$2,700 per month or a specific number of hours per week to ensure the charity can help as many seniors as possible.

6. Documentation & Record Keeping

The Organization will maintain records for seven (7) years for each applicant, including:

- The completed application and proof of income.
- The written reason for approval or denial.
- Copies of care authorizations and payments made to vendors.