REQUEST FOR PROPOSAL 2020-2021: TITLE III C NUTRITION PROGRAM C-1 & C-2 BIDDERS GUIDE

Contents

PART I. INTRODUCTION

Sourcewise is a nonprofit organization designated by the State of California Department of Aging as the Area Agency on Aging (AAA) for Santa Clara County. As the AAA, Sourcewise is responsible for planning, advocacy, coordination, and community development for senior programs and the contract administration of Older Americans Act and Older Californians Act funds allocated for seniors in Santa Clara County. The goal of Sourcewise is to provide a comprehensive system of services to older persons to allow them to live independently and avoid inappropriate institutional placement.

Sourcewise's annual planning process identifies the needs of older persons in Santa Clara County and develops Area Plan objectives to address these needs. The objectives are accomplished, in part, through the purchase of services from community-based organizations. For the 2020–2021 fiscal year starting on August 01, 2020 through June 30, 2021, Sourcewise invites the submission of proposals for the provision of the following supportive services including:

- Title III C-1 Congregate Nutrition Program
- Title III C-2 Home Delivered Meal Nutrition Program

The Request for Proposal Bidders Guide provides detailed instruction to support agency's through proposal development and submission process.

PART II. GLOSSARY OF TERMS

AAA: Area Agency on Aging is an identifiable private nonprofit or public agency designated by the Department of Aging which works for the interest of older Californians within the PSA. This agency engages in community planning, coordination and program development, and, through contractual arrangements, provides a broad array of social and nutritional services. SOURCEWISE is the designated AAA in Santa Clara County.

Bidder: The applicant organization responding to the Request for Proposal. This term is used interchangeably with 'applicant.'

CDA: California Department of Aging

Contract: An official document binding both parties regarding the program and services to be provided. The selected proposed budget and Title III, Title VII program will become a part of the contract including requirements and agreement to comply with Older American Act, CFR, CCR and provisions required by Sourcewise.

Focal Point: A designated senior center that provides a broad spectrum of senior services.

Greatest Economic Need: Having an income at or below the federal official poverty line defined by the federal Bureau of the Census and published annually by the Department of Health and Human Services.

Greatest Social Need: The need caused by noneconomic factors which include any of the following:

(1) Physical and mental disabilities.
(2) Language barriers.
(3) Cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, sexual orientation, gender identity, or gender expression that does the following:
   a) Restricts the ability of an individual to perform normal daily tasks.
   b) Threatens the capacity of an individual to live independently.

Matching Contributions: The cash and/or in-kind contribution made by the bidder organization that qualifies as match for the request for funds.

Minority Provider: A nonprofit organization whose controlling board is comprised of at least 51% minority individuals who are African American, Hispanic, American Indian/Native Alaskan/Native Hawaiian, and/or Asian American/Pacific Islander.

Minority: A person of color who is any of the following:

a. Black/African American: a person having origins in any of the Black racial groups of Africa.
b. Hispanic: a person of Mexican, Puerto Rican, Cuban, central or South American, or other Spanish or Portuguese culture or origin regardless of race.
c. Asian/Pacific Islander: a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United states Trust Territories of the Pacific including the Northern Marianas.
d. American Indian/Alaskan Native: an American Indian, Eskimo, Aleut, or Native Hawaiian.

Non-Profit: Any agency, institution, or organization which is owned and operated by one or more corporations or associations with no part of the net earnings benefiting any private shareholder or individual.

Older Americans Act: The federal funding source for supportive service programs funded under this Request for Proposal.

Older Californians Act: The state funding source for Community-Based Services Programs.

Open and Competitive Process: The formal Sourcewise process followed to solicit proposals for the provision of services.

Request for Proposal (RFP): An official document that requests community organizations to respond to a formal invitation to provide a specific program of services. It contains the terms and conditions an operating organization must comply with in order to fulfill its contract with Sourcewise.

Target Population: Persons 60 years and older who are in the greatest social need, the greatest economic need, with particular attention to low-income minority older individuals, older individuals with Limited English Proficiency (LEP), and older individuals residing in rural areas.

Unit of service: The activity which describes the type of service to be contracted for; all SOURCEWISE funded programs must provide a required number of units for the program area.

Unduplicated Persons Count: Unique count of clients who receive services between July 1, 2020 – June 30, 2021. Agency's submitting proposals are required to include an unduplicated person count to provide services. Reporting requirements are described and nonnegotiable for registered and nonregistered Older American Act funded services.

Evaluation Committee: a team of evaluators that assess and score RFP submissions.

III. AAA TECHNICAL ASSISTANCE AND COORDINATION[1]

(a) Sourcewise shall furnish information in a timely manner and provide technical assistance, both on-site and through written communications, to service providers under contract with the AAA. The assistance shall be based upon both of the following:

(1) The AAA's assessment findings of the service providers.
(2) Requests made by service providers.

(b) In addition to (a), the AAA shall provide technical assistance to other organizations concerned with the needs of older individuals upon the request of such an organization.

(c) Sourcewise shall:

(1) Undertake coordination activities designed to develop or enhance the development of community-based systems of care in, or serving, each community, as defined by the AAA, in the PSA. These coordination activities shall include, but not be limited to, all of the following:

(a) **Coordination with services provided under both of the following:**

(1) **Title VI, Part A:** Grants for Native Americans, commencing with 42 U.S.C. 3057b.

(2) **Title VI, Part B:** Grants for Supportive and Nutrition Services to Older Hawaiian Natives,.

(b) Programs described in 42 U.S.C. 3013

(c) The coordination of access, in-home and legal assistance services, with community-based organizations established to benefit individuals with Alzheimer's disease and their families.

(d) Agencies that provide services related to health, social services, rehabilitation and mental health services.

(2) **Require the service providers with which it contracts to both:**

(a) Coordinate services with other appropriate services available in the community.

[1] 22 CCR 7252

(b) Ensure that no service constitutes a duplication of a service provided by other entities.

(3) Conduct efforts to facilitate both of the following:

(a) The coordination of community-based long-term care services designed to allow individuals to stay in their homes.

(b) The involvement of long-term care providers in the coordination of community-based long- term care services.

(c) The community awareness of and involvement in addressing the needs of residents in long- term care facilities, including residential care facilities and skilled nursing facilities.

IV. GENERAL INFORMATION FOR BIDDERS

1. Estimated Program Funding:
   Proposals must be limited to the amount of funds that correspond to the specific program stated. Each of the allocations represents a planning estimate provided by the California Department of Aging and is subject to change. Funding is contingent upon the availability of state and federal funds.

2. Required Program Match:
   All bidders must provide a share of the program cost. The match must directly relate to the project and expansion activities being proposed. Matching requirements are contingent based on the specific project funding source.

   Older Americans Act funding is not intended to be sole support for any service provided. Funding from other sources is necessary to effectively provide services. Additional points for otherwise responsive proposals will be awarded for applicants who exceed the minimum matching requirements.

3. Program Support: Bidders must assure that Older Americans Act funds are not used to replace funds from non-federal sources and must take steps to obtain support from private sources and other public organizations for services. The intent of this funding is to serve as a catalyst for receipt of additional funding.

4. Equipment Availability:
   List the model numbers, cost, age and condition of equipment that has been purchased with Older Americans Act funding

5. Contract Period:
   The contract period for programs included in this RFP is a eleven-month period from August 01, 2020 through June 30, 2021. Yearly contract renewals up to three years starting on July 01 following the initial contract year is allowable at the discretion of the AAA subject to annual renegotiation and availability of federal, State, and local funding.

6. Multiple Contract Awards:
   Sourcewise reserves the right to enter into multiple contracts for any program at a lesser amount than stated in the non-competitive renewal.

7. Eligible Organizations:
   All interested applicants, whether public, private, non-profit or profit-making agencies are eligible organizations. Contract awards made to for-profit organizations must be approved by the California Department of Aging. All recipients of funds that are private agencies must be incorporated in order to safeguard the interests of the California Department of Aging and Sourcewise.

V. FEDERAL AND STATE PROGRAM REQUIREMENTS

The authorizing Federal and State statutes governing the RFP process and Sourcewise as an Area Agency on Aging are found in the Older Americans Act as amended in 2006, Title 22 of the California Code of Regulations, and Division 8.5 of the California Welfare and Institutions Code.

Before completing the proposal, bidders should review the minimum program requirements outlined below. Bidders are unable to modify the requirements; these requirements become a condition of any contract awarded for the service. Sourcewise may negotiate modifications after the bid/proposal has been selected to assure that all necessary program requirements are covered before the contract is signed. The awarded proposal will become a part of the contract.

A. Targeting:

(a) Sourcewise (and thereby the contracted providers of Sourcewise) shall target services to older individuals within the County of Santa Clara with the following characteristics:

(1) Older individuals with the greatest economic need, with particular attention to low-income minority individuals.

(2) Older individuals with the greatest social need, with particular attention to low-income minority individuals.

(3) Older Native Americans.

(b) AAAs shall use outreach efforts to identify individuals eligible for assistance under federal law. Special emphasis shall be given to the following groups. Older individuals:

(1) Who reside in rural areas.

(2) Who have greatest economic need, with particular attention to low-income minority individuals.

(3) Who have greatest social need, with particular attention to low-income minority individuals.

(4) With severe disabilities.

(5) With limited English-speaking ability.

(6) With Alzheimer's disease or related disorders with neurological and organic brain dysfunction and the caretakers of these individuals.

(c) For the purposes of (a), targeting of services within the County of Santa Clara shall be addressed as follows:

(1) Determine the number, location, and needs of older individuals with these characteristics.

(2) Consider the needs of the targeted groups in planning the services to be included in the Area Plan.

(3) If possible, locate the provision of services in areas where a significant number of the targeted groups resides.

Develop methods specific to the local community to serve the targeted group.

For the purposes of (b), outreach means to provide information and encouragement about existing services and benefits to individuals.

B. Coordination:

Bidders must form and administer cooperative agreements with other community agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services.

C. Public Information and Outreach:

Bidders must have planned public information and outreach activities, including distribution of a brochure, to ensure the participation of those eligible older persons are of the target population.

D. **Recruitment and Training:**
Bidders must demonstrate recruitment and appropriate training of staff and volunteers to support and meet the minimum program requirements of the funded services.

E. **Client Contribution:**
Bidders must provide clients with the opportunity to contribute voluntarily and confidentially to the cost of the service.

F. **Client Input:**
Bidders must have a procedure for obtaining the views of the participants of the service being provided.

VI. LOCAL SOURCEWISE POLICIES

Priorities and Preferences: Preference will be given to those agencies meeting the definition of minority agency, specifically those applying for service provision to geographic areas with high concentrations of low-income minority elders.

Single Agency Subcontracts with Minority Agencies: Where a program is offered on a countywide basis for a single agency contract, preference will be given to agencies that subcontract with minority agencies/organizations for services to low- income minority persons.

Late Proposal Submissions or Revisions: Proposals submitted after the deadline will not be accepted.

Contract Award Requirements: Following are additional contractual obligations for all Sourcewise contractors that will influence the submission of a proposal:

1. **Performance-Based Contracting:** Contract awards include a performance standard clause with a specific, negotiated unit cost reimbursement rate and remedies if performance (quality or quantity) falls below a specified level in a specified period of time.

2. **Program, Fiscal Reporting, and Record Keeping:** Service providers will be required to submit monthly and/or quarterly reports on various aspects of program activities in accordance to the Sourcewise standard format. All records of the service provider relating to the contract award must be maintained at the project site or local office and be made available for Sourcewise review as outlined in the contract agreement.

   Service providers will be required to establish and maintain a financial management system that assures control over the use of contract funds in accordance with federal and state requirements.

   Registered service providers are required to submit monthly detailed fiscal reports to request payment of contract funds.

   Non-registered service providers are required to submit a quarterly detailed fiscal report to successfully request contract funds. All costs reported by the provider in monthly and final fiscal reports must be supported by appropriate accounting documentation.

3. **Grievance Procedure:** The agency is required to submit a written grievance process for reviewing and attempting to resolve complaints of older individuals receiving services funded the Older American Act.

4. **Transition Plan:** A transition plan for the termination or transfer of services is required as part of the bidding application process

5. **Insurance:** Prior to commencement of any work any Agreement with Sourcewise, the bidding agency shall be required to obtain the following:

- **Liability Insurance:** procure and maintain comprehensive general liability insurance for the life of the agreement of no less than $1,000,000 per occurrence for bodily injury and property damage combined. Higher limits may be required in cases of higher than usual risks.

- **Workers' compensation and Employer Liability Insurance:** The bidding agency shall have in effect during the entire life of the proposed agreement to provide service, as prescribed by the laws of California and certificates of insurance, will be requested.

- **Automobile liability,** including non-owned auto liability, of not less than $1,000,000 for volunteers and paid employees providing services supported by the contract.

- If applicable, or unless otherwise amended by future regulations, the provider shall comply with the Public Utilities Commission General order No. 115-F which requires higher levels of insurance for charter-party carriers of passengers and is based on seating capacity as follows:

    - $750,000 if seating capacity is under 8
    - $1,500,000 if seating capacity is 8-15
    - $5,000,000 if seating capacity is over 15

6. **Bonding**: Service provided will be required to secure and maintain during the contract period a commercial fidelity bond in the penalty of either $10,000 or 20% of the total contract award, whichever is larger, to protect against misappropriation of funds by any employee or volunteer or the agency.

7. **Audits:** Service providers will be required to submit to Sourcewise an audit of expenditures made under the contract award. This audit must be conducted by an independent auditor or auditing firm in accord with federal guidelines and must specifically identify revenue, expenditures, matching funds and program income from the project.

   Contracts that expend $750,000 or more in federal funds shall arrange for an audit to be performed as required by the Single Audit Act of 1984 (Public Law 98-502); the Single Audit Act Amendments of 1996 (Public Law 104-156); and 2 CFR 200.501 to 200.521 (formerly OMB Circular A-133).

8. **Other Applicable Regulations:** Applicants must be in conformity with the rules and regulations of the U.S. Administration on Aging and other applicable Federal and State mandates.

9. Contracts in Excess of $100,000
   If all funding provided herein exceeds $100,000, the bidder shall comply with all applicable orders and requirements issued under the following laws:
    - Clean Air Act, as amended [42 USC 1857]
    - Clean Water Act, as amended [33 USC 1368]
    - Federal Water Pollution Control Act, as amended 33 USC 1251, et seq.]
    - Environmental Protection Agency Regulations [40 CFR, Part 15] and [Executive Order 11738]
    - Public Contract Code Section 10295.3
    - Certification Regarding Lobbying Section 1352, title 31, United States code.

For additional information regarding the RFP process reference the California Code Regulations here.

For additional information related to program information reference the California Code Regulations here.

Federal Regulations relating to the Older Americans Act can be reviewed here.

Bidders can review Sourcewise policy & procedure manual, memorandums, and assessment/evaluation criteria and instruments with a written request submitted via regular mail or email to Sourcewise Chief Executive Officer, Aneliza Del Pinal (adelpinal@mysourcewise.com).

PART III: REQUEST FOR PROPOSAL GENERAL INFORMATION

I. SUBMISSION OF PROPOSAL

The Sourcewise Older American Act Application is available on the Sourcewise website at: http://www.mysourcewise.com/area-plan. An application is required to be completed for each program. When the bidding agency submits the application, an original, plus five copies should be submitted in the order in which it is presented.

The bidder will bear all costs of developing the proposal and submitting **one original and five copies to Sourcewise**. Sourcewise reserves the right to reject all or part of any proposal if that proposal does not meet the minimum submission qualifications stated in the RPF document.

Each proposal shall include the following four sections:

(A)	Program Description	(C)	Program Budget
(B)	Program Management	(D)	Supporting Documentation

Proposals may be withdrawn from consideration by the bidder who has submitted a proposal but who no longer wishes to be considered at any time prior to award. To withdraw a proposal an authorized bidder representative must deliver a written request of withdrawal in person to the Sourcewise office to the attention of Elizabeth Brown, Sourcewise Area Planner.

II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below by Title. The due dates are specific for each Title, please review carefully and plan accordingly. Detailed steps describing the RFP process is available on Page 09 – 10 of this document.

Schedule for Title III B, Title III D & Title VII programs

RFP for Title III B & D available for applicants	Tuesday, June 02, 2020
Letter of Intent	**June 12, 2020**
Bidders Conference	**June 15, 2020**
Due date for proposals	**July 02, 2020**
RFP Evaluation	**July 06 – July 12, 2020**
Evaluation Committee recommendations	**July 14, 2020**
Board of Directors approval	**July 16, 2020**
Notification of contract awards mailed	**July 17, 2020**
Deadline for appeals	**July 24, 2020**
Contract negotiations	**July 20 - 28, 2020**
Services begins	**August 1, 2020**

III. STEP BY STEP INSTRUCTIONS

The following instructions correspond with each of the steps outlined above to successfully submit a proposal.

Step 1 Announcement of Request for Proposal:

View all Request For Proposal (RFP) available on the Sourcewise website at www.mysourcewise.com/area-plan.

Step 2 Letter of Intent Submission:

The Letter of Intent must be submitted by the bidder on/or before Friday, June 12, 2020 to Sourcewise by 4:30 p.m.

All bidders must complete and return the letter of intent; partial submissions and alternative formats will not be accepted. The authorized signature can submit a digital/electronic signed Letter of Intent to Elizabeth Brown at ebrown@mysourcewise.com.

Submit the original copy posted on or before the due date and mail to the Sourcewise office.

Sourcewise
Attn: Elizabeth Brown
3100 De La Cruz Blvd, Suite 310
Santa Clara, CA 95054

Step 3 Bidders Conference:

Attend the Bidders conference scheduled on Monday June 15, 2020 from 1:00 p.m. – 2:30 p.m. via teleconference.

Please email Elizabeth Brown to receive an invitation to the bidder's conference at ebrown@mysourcewise.com.

To learn more about the purpose of a bidders conference visit: http://www.businessdictionary.com/definition/bidder-s-conference.html

Step 4 Proposal Submission:

All Title III C-1 & C-2 completed proposals must be submitted on July 02, 2020 at 4:30 p.m.

Proposals submitted after this deadline will not be accepted. Faxed or e-mailed submissions are not acceptable.

Step 5 RFP Evaluation:

The Sourcewise RFP Evaluation Committee evaluates the proposals based on the criteria outlined in the RFP and submits recommendations to the Sourcewise Board of Directors. Members of the Evaluation Committee are comprised of Advisory Council members and Governing board members. They will evaluate all proposals to determine responsiveness to this RFP. The panel will recommend selection of a candidate bidder for final approval and negotiation of a contract. Proposals will be evaluated on the bidder's ability to meet the specifications and terms of conditions of this RFP.

No single objective will constitute the basis for selection. During the selection process, the Evaluation Committee may wish to interview bidders. Interviews will be for clarification purposes only. No new material will be permitted at this time.

Step 6 RFP Recommendation:

The Evaluation Committee submits their final recommendation to the Board of Directors for contract award(s)

Step 7 Board of Directors Approval:

The Sourcewise Board of Directors makes the final decision to select the contractors for award.

Step 8 Notification of Award:

A notification will be made by mail to both successful and unsuccessful applicants. A notice of adverse determination from the AAA shall meet all of the following conditions:

Be in writing and delivered by either of the following methods:

(1) Faxed or emailed with a mailed follow-up original.

(2) Certified or overnight mail return receipt requested.

Describe the grounds for the adverse determination in sufficient detail to enable the entity to respond.

Include all of the following information:

(1) The reason(s) for the adverse determination.

(2) The evidence on which the adverse determination is based.

(3) The effective date of the adverse determination.

(4) The legal or contractual citation upon which the adverse determination is based.

(5) A citation to, or copy of, the hearing process to be followed, including the entity's right to a hearing and the time period in which to request a hearing.

(6) In addition, an AAA shall include in its final notice of adverse determination to an existing service provider or an applicant service provider a statement that all appeal procedures have been exhausted.

Step 9 Deadline of Appeals:

Must be made in writing to the CEO of Sourcewise within seven days of the notification of award, on July 24, 2020.

Step 10 Contract Negotiations:

As part of the review process, the evaluation committee and the Board of Directors may require modifications or revisions to a proposal. This assures that all necessary program requirements are covered before the contract is signed.

Step 12 Service Begins:

This is the date on which funded services begin and the date for beginning program monitoring and evaluation.

PART IV: RFP SUBMISSION OF PROPOSAL GUIDANCE AND EVALUATION CRITERIA

Proposals will be evaluated according to the criteria outlined below for each section of the proposal.

Part A: Program Description (54%)

I. Program description narrative must cover the following topics:

- Adequacy of plan and methodology to provide proposed services within required program specifications.
- Comparison of program objectives and units of service to those specified in the RFP.
- Capability of proposed timetable and process for achieving objectives.
- Minority persons in greatest economic need proportionate to the total elderly population served.
- Adequacy of plan for client contributions.
- Adequacy of plan for the recruitment and use of volunteer and staff resources.
- Capability of agency process to work with and encourage client input in planning and program evaluation.
- Demonstration of appropriate agency linkage and coordination, including subcontracts or agreements with other community organizations and resources to increase cost effectiveness and reduce duplication.
- Adequacy of plan for expansion of existing service delivery.

II. Goals and objectives must be specific, measurable and attainable.

Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

Service providers must show intent and methodology to serve the needs of:

- Age 75+
- Low Income (federal poverty)
- Minority
- Living Alone

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kind of task that will be performed by volunteers.

Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

Client Contribution
Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

Describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

Part B: Program Management (20%)

I. Program Management narrative must cover the following topics:

- Structure of organization and staffing patterns of paid staff and volunteers and its potential impact on achievement of proposed objectives.
- Experience of applicant agency, particularly in providing the proposed services.
- Experience of applicant agency in serving older persons, particularly the target population.
- Qualifications of personnel to achieve proposed objectives and access the target population.
- Adequacy of training plan for staff and volunteers.
- Adequacy of applicant's facility to accomplish the proposed program.
- Adequacy of agency's system of record keeping and data collection for evaluation purposes.
- Capability of agency plan to obtain additional funding support from private and other public sources.
- Adequacy of agency plan to self-evaluate and monitor proposed objectives.
- Status as a minority organization, or organizations serving the target population of highest social and physical need.

Part C: Budget (20%)

I. The program budget template is located on the Sourcewise website here: http://www.mysourcewise.com/area-plan The proposed program budget will be scored based on the agency's ability to include:

- Reasonable estimated cost of proposed program.
- Estimated agency match must directly relate to the project and expansion activities being proposed.
- Percentage of program budget allocated for direct service costs vs. administration, overhead and indirect costs.
- Comparison of total program costs with program objectives and units of service for geographic area to be served.
- Comparison of total program costs with program objectives and units of service for geographic area to be served.
- Competitive salary/benefit package. Supervision/Training built into budget.

II. General Program Budget Requirements:

One program budget must be submitted on the forms attached (C-1 through C-5) for each proposal application. The program budget must include all costs, both cash and in-kind, required to provide all service activities proposed.

The program budget must cover the entire contract period and include the requested amount of Older Americans Act funds, other sources of cash, anticipated program income and the value of all donated services and materials.

If the program budget includes start-up costs of a one-time-only nature, please list these on a separate sheet of paper. This is in addition to including them in the program budget. Start-up costs should be identified using the proper budget category, source, and amount of anticipated expenditure.

III. Additional Budget Requirements:

On budget forms C-1 through C-5, the individual funding sources must be listed and the sum of all the funding sources must equal the Total Program Cost (column A) for each budget category. The funding sources are defined as follows:

1. **Older Americans Act Funds Requested:** This column reflects the actual Title III amount from Sourcewise. The total of this column must equal the amount of funding provided for the program as specified in the Program Standards section.
2. **Non-Federal Match:** This column reflects non-federal cash or in-kind resources received by the applicant and used to fulfill or exceed the local 11.1% match requirement. The amount of required match is computed by dividing the total amount of Older Americans Act funds by 9. This figure is the minimum required match.

   Example of Non-federal Matching Sources:
   a. Revenues from city, county and state sources;
   b. Revenues from private organizations;
   c. Individual contributions not tied to receiving service;
   d. United Way revenues;
   e. Revenue sharing;
   f. Volunteer services, space, consultants, and any sources.

3. **Cash Match:** Non-federal cash received by the agency and used to fulfill the local match requirement.

4. **In-Kind Match:** Equivalent value of donated or volunteer services, supplies, etc. from nonfederal third-party sources and used to fulfill the local match requirement. It may also include the value of agency owned property utilized in the program.

5. **Program Income**: This column reflects the anticipated amount of funding or earnings to be received by the provider during the contract period from the following: client contributions for service, other individual donations rents, payments and residuals to the program for use of facilities, interest, etc.

   Program income received as a direct result of the program must be used for costs directly related to that program and shall be spent before Sourcewise funds are applied. It cannot be used to meet the local match requirement.

6. **Other Resources:** This column reflects any other cash or in-kind governmental (public) or private resources (United Way, foundation grants, etc.), which are used in the program.

Budget Summary (Form C-1) should be completed after the detailed cost breakdown, forms C-2, C-3, C-4 and C-5. List by budget category for summary totals from Forms C-2 through C-5 for each funding source in columns B through E. Column A should reflect the total costs for each budget category and match the totals for each budget category in the detailed breakdown. Refer to the definition of each funding source as outlined above.

A detailed breakdown of budge categories (Forms C-2 through C-5) represents the detailed itemizations for each budget category. All entries should be rounded off to the nearest dollar. Detailed costs must be shown for each expenditure made in support of the program. The budget categories are included in the Appendix A.

Part D: Supporting Documentation (8%)

I. Include the following:

- Organizational Chart: Attach a copy of the agency's organization chart including the proposed program.
- 501 c3 designation
- Job Descriptions: Attach job descriptions of the staff that will be paid with the Title III or VII funds.
- Board of Directors roster
- Bond & Insurance certification information including; fidelity bond, general liability, private vehicle insurance, project vehicle insurance, worker's compensation insurance.
- Documentation of Emergency plan that can be activated in an emergency.
  (1) The plan should include assurances that the facility is prepared and that the staff, volunteers, and participants have been trained in the emergency plan and in fire safety.
  (2) Describe how Title III or Title VII service will be provided based on the existing COVID-19 shelter-in-place order and/or if social distancing practice is required after July 01, 2020.
- Submit the agency's written grievance process for reviewing and attempting to resolve complaints of older individuals.
- Transition plan for termination or transfer of services
- Plan for additional and/or decreased funding, including:
  (1) Describe how additional funds would be used if additional funds become available
  (2) Describe how services would be reduced due to a reduction of funds

Selection is based on the highest overall score.

IV. Terms and conditions

A. Certification

By submitting a proposal, bidder certifies that it has fully read and understood this RFP and has full knowledge of the nature of this service, including scope and quality of work to be performed. Bidder also certifies that its proposal was prepared without prior understanding , agreement, or connection with any other bidder submitting a proposal for this RFP, and is in all respects fair and without collusion or fraud, so that all proposals will result from free, open, and competitive proposing among all bidders.

B. Assignment and Guarantee

No assignment by the bidder of the contract or any part thereof, or of funds to be received hereunder, is binding unless Sourcewise has given written consent before such assignment. There is also no guarantee of a minimal amount of work or compensation for any bidder selected for contract negotiations.

C. Financial Responsibility for Proposal Costs

Sourcewise accepts no financial responsibility for any costs incurred by the bidder in responding to this RFP. Proposals will become the property of Sourcewise and may be used by the agency in any way deemed appropriate.

D. Clarification

Should discrepancies or omissions be found in this RFP or should there be a need to clarify this RFP, questions or comments should be directed to Elizabeth Brown, ebrown@mysourcewise.com no later than 4:30 pm on Friday April 24, 2020. Sourcewise shall not be responsible for, nor be bound by any oral instructions, interpretations or explanations issued by any representative of the agency.

E. Discrimination

The bidder and all subcontractors must not discriminate, nor permit discrimination on any person on the grounds of race, national origin, sex, disability, sexual orientation, veteran status or any other legally protected classification, in their employment practices, in any of their contractual agreements, and/or in all services and accommodations that they offer the public or in their business operations.

F. Indemnification

Bidder, at its own expense and without exception, shall indemnify, defend and pay all damages, costs, expenses including but not limited to, attorney fees, and otherwise hold Sourcewise harmless, its officials, its officers, its employees and agents from any and all liability of any nature or kind arising out of or related to the preparation or presentation of a proposal in response to this RFP.

G. Gratuity Prohibition

Bidder shall not offer any gratuities, favors or anything of monetary value to any official, employee, or agent of Sourcewise for the purpose of influencing consideration of this proposal.

H. Contract provisions

If a contract is awarded, the selected bidder will be required to adhere to a set of general contract provisions contained in the Sourcewise contract, including but not limited to: (1) indemnification; (2) General liability insurance with limits of not less than $1,000,000 per occurrence for bodily injury and property damage combined (higher limits may be required by Sourcewise in cases of higher than usual risks (3) professional liability insurance of no less than $1,000,000 as it appropriately relates to services rendered; such coverage may include medical malpractices and/or errors and omissions; (3) automobile liability insurance, including non-owned auto liability, of not less than $1,000,000 for volunteers and paid employees provided services supported by the Sourcewise contract; (5) workers compensation; (6) maintenance of necessary licenses; permits, and certificates; (7) recordkeeping; (8) non-discrimination; and adherence to all applicable federal, state and local laws. Exceptions will not be granted.

I. Right of Refusal

Sourcewise reserves the right to reject any and all proposals for any reason.

PART VII: PROGRAM STANDARDS

TITLE III C-1: CONGREGATE NUTRITION PROGRAM STANDARDS

Program Goal: Assist older individuals in California to live independently, by promoting better health through improved nutrition, and reduced isolation through programs coordinated with nutrition-related supportive service. Aims to ensure older adults remain independent in their communities.

To reduce hunger and food insecurity, promote socialization of older individuals, and increase health and well-being of older individuals by assisting such individuals to gain access to nutrition and other disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

Service Definition: A meal provided to an eligible individual in a congregate group setting, that meets all of the requirements of the Older Americans Act and State/Local laws, and assures a minimum one-third of the Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Meals must also meet the Nutrition Services Incentive Program (NSIP) requirements.

Service Type: Registered Service

Unit of Service: 1 meal = 1 unit of service

Scope of Service & Funding

Funding available: $1,325,958

Minimum Service Standard:

Units of Service: 514,507
Unduplicated Persons Served: 12,073

Required Match: The minimum cash and in-kind match is 11.11%. Based on the available funding, the below cash amounts include the required match for Title III C Nutrition Program.

Area to be Served, contract 1: Santa Clara County

Contract term: Contract begins on August 01, 2020 – June 30, 2021 with an option to renew up to three (3) additional years. Year begins on July 01, 2021 in subsequent years.

Service Area Target Population: All contracts are required to provide services to all persons aged 60 and over.

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

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Congregate Meal
Program Specific Scope of Service:

1. Provide a hot or otherwise appropriate meal 5 or more days a week (unless such service is not feasible), and any additional meals which the recipient of a contract may elect to provide.

2. The meals must comply with the Dietary Guidelines for Americans published by the Secretary of HHS and the Secretary of Agriculture. Providers must serve meals that meet certain dietary requirements based on the number of meals served by the project each day. Providers that serve one meal per day must provide to each participant a minimum of one-third of the daily recommended dietary reference intakes (DRIs) established by the Food and Nutrition Board of the National Academy of Sciences.

3. Provide the meals in a congregate setting, including adult day care facilities and multigenerational meal sites.

4. Provide nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of meal participants.

5. Comply with the CRFC and the local health department regarding safe and sanitary preparation and service of meals.

6. Comply with the Division of Occupational Safety and Health (Cal/OSHA), California Department of Industrial Relations requirements regarding staff and participant safety.

7. At a minimum, perform quarterly monitoring for safe food handling and sanitation practices of food facilities.

8. Have a manager on staff to conduct the day-to-day management and administrative functions of the program, and have one of the following:
    a. An associate degree in institutional food service management, plus 2 years of experience as a food service supervisor, or,
    b. Demonstrate experience in food service, and within 12 months of hire successfully complete a minimum of 20 hours specifically related to food service management, business administration, or personnel management, or,
    c. Two years' experience managing food services.

9. All staff, paid and volunteer, shall receive a minimum of 4 annual hours of training to perform their assigned responsibilities, including at a minimum:
    a. Food safety, prevention of foodborne illness, and HACCP principles.
    b. Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.

10. Each congregate meal provider shall:
    a. Include procedure for obtaining the views of participants about the services received.
    b. Not preclude the services of a meal to a participant who has failed to make a reservation when food is available.

11. Each congregate meal site shall meet all of the following:
    a. Have a paid staff or volunteer designated to be responsible for the day-to-day activities at each site, and physically be on-site during the time of the congregate meal program when taking place.
    b. Have restrooms, lighting and ventilation which meets the requirements of the CURFFL.

    c. Have equipment, including tables and chairs, that is sturdy and appropriate for older individuals. Tables shall be arranged to assure ease of access and encourage socialization.

12. An eligible individual who receives a meal shall be given the opportunity to contribute to the cost of the meal. The provider shall develop a suggested contribution, considering the income ranges of older adults in the community. No eligible individual shall be denied participation because of failure or inability to contribute. In addition:
    a. A sign indicating the suggested contribution for eligible individuals, and the fees for guest, shall be posted near the contribution container at each congregate meal site. A guest fee shall cover all meal costs.
    b. The provider shall ensure that the amount of the eligible participants contribution is kept confidential.
    c. Upon award of the contract, the provider shall establish written procedure to protect contributions and fees from loss, mishandling and theft. Such procedures shall be kept on file at the providers site.
    d. All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.

13. Provide, at a minimum, 4 nutrition education sessions annually. Nutrition education is defined as demonstrations, presentations, lectures, or small group discussions. A registered dietitian shall provide input and approve the content of nutrition education prior to the presentation.

14. Provide meals to the following eligible populations, including older individuals age 60 and older:
    a. The spouse of any older individual
    b. A person with a disability under age 60 who resides in a housing facility primarily occupied by older individuals at which congregate nutrition services are provided.
    c. A person with a disability who resides at home with and accompanies an older individual who participates in the program.
15. Provide meals to eligible volunteers:
    a. A volunteer under age 60 may be offered a meal if doing so will not deprive an older individual of a meal.
    b. A written policy for providing and accounting for volunteer meals shall be developed and implemented.

16. The program encourages the use of volunteers.

17. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.

18. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from August 01, 2020 – June 30, 2021. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

Targeting

Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

Service providers must show intent and methodology to serve the needs of:

- Age 75+
- Low Income (federal poverty)
- Minority
- Living Alone

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kind of task that will be performed by volunteers.

Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

Describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

Reporting Requirements:

As a "registered service." Detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum ("Q"), Sourcewise's database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum (“Q”):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Nutrition Risk assessment

Program Goal: Assist older individuals in California to live independently, by promoting better health through improved nutrition, and reduced isolation through programs coordinated with nutrition-related supportive service. Aims to ensure older adults remain independent in their communities.

To reduce hunger and food insecurity and increase health and well-being of older individuals by assisting such individuals to gain access to nutrition to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

Service Definition: A meal provided to an eligible individual in his or her place of residence, that meets all of the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Meals must also meet the Nutrition Services Incentive Program (NSIP) requirements.

Service Type: Registered Service

Unit of Service: 1 meal = 1 unit of service

Scope of Service & Funding
Funding available: $55,000

Service Standard:
Units of Service: 12,375
Unduplicated Persons Served: 80

Meal Type: Hot or Fresh meals

Required Match: The minimum cash and in-kind match is 11.11%. Based on the available funding, the below cash amounts include the required match for Title III C Nutrition Program.

Area to be Served, contract 1: Santa Clara County

Contract term: Contract begins on August 01, 2020 – June 30, 2021 with an option to renew up to three (3) additional years. Year begins on July 01, 2021 in subsequent years.

Service Area Target Population: Provide services to all persons aged 60 and over.

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

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19. Meal must comply with the most recent Dietary Guidelines for Americans, including at minimum of one-third (1/3) of the in the Dietary Reference Intakes (DRIs) by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences (2006), which are incorporated by reference.

20. Provide nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of meal participants.

21. Comply with the CRFC and the local health department regarding safe and sanitary preparation and service of meals.

22. Comply with the Division of Occupational Safety and Health (Cal/OSHA), California Department of Industrial Relations requirements regarding staff and participant safety.

23. At a minimum, perform quarterly monitoring for safe food handling and sanitation practices of food facilities.

24. Have a manager on staff to conduct the day-to-day management and administrative functions of the program, and have one of the following:
    a. An associate degree in institutional food service management, plus 2 years of experience as a food service supervisor, or,
    b. Demonstrate experience in food service, and within 12 months of hire successfully complete a minimum of 20 hours specifically related to food service management, business administration, or personnel management, or,
    c. Two years' experience managing food services.

25. All staff, paid and volunteer, shall receive a minimum of 4 annual hours of training to perform their assigned responsibilities, including at a minimum:
    a. Food safety, prevention of foodborne illness, and HACCP principles.
    b. Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.

26. Each home-delivered meal provider shall:
    a. Develop and implement criteria to assess the level of need for home-delivered nutrition services of each eligible participant.
        i. Initial determination of eligibility may be done by phone
        ii. Complete a written assessment 2 weeks prior to the start of meal serves and shall include an assessment of the type of meals appropriate for the participant in their home environment.
        iii. Reassessment of need shall be determined quarterly. Such reassessment shall be done in the home of the participant at least every other quarter. Two times a year.
    b. Provide instructions in the language of the majority of the participants for handling and re-heating the meals.
    c. The provider will develop a waiting list for home-delivered meals whenever the home delivered meals provider is unable to provide meals to eligible individuals. The decision to place eligible recipients of a home-delivered meal on a waiting list, and their position on such a list, shall be based on greatest need and/or in accordance with policy established by the home-delivered meal provider, in consultation with Sourcewise.

27. An eligible individual who receives a meal shall be given the opportunity to contribute to the cost of the meal. The provider shall develop a suggested contribution, considering the income ranges of older adults in the community. No eligible individual shall be denied participation because of failure or inability to contribute. In addition:
    a. A sign indicating the suggested contribution for eligible individuals, and the fees for guest, shall be posted near the contribution container at each congregate meal site. A guest fee shall cover all meal costs.
    b. The provider shall ensure that the amount of the eligible participants contribution is kept confidential.
    c. Upon award of the contract, the provider shall establish written procedure to protect contributions and fees from loss, mishandling and theft. Such procedures shall be kept on file at the providers site.
    d. All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.

28. Provide, at a minimum, 4 nutrition education sessions annually. Nutrition education is defined as demonstrations, presentations, lectures, or small group discussions. A registered dietitian shall provide input and approve the content of nutrition education prior to the presentation. Upon award the requirements on administering the trainings will be included.

29. The program encourages the use of volunteers. Volunteers shall be recruited and used in any phase of program operations where qualified.

30. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.

31. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from August 01, 2020 – June 30, 2021. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

    Targeting

    Service providers must have established methods, other than use of means test, to provide services to all persons aged 60 and over.

    Service providers must show intent and methodology to serve the needs of:
    - Age 75+
    - Low Income (federal poverty)
    - Minority
    - Living Alone

    Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

    Staffing & Volunteers

    Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kind of task that will be performed by volunteers.

Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

Describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

Reporting Requirements:

As a "registered service." Detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum ("Q"), Sourcewise's database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum ("Q"):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- Nutrition Risk assessment

APPENDIX A: PROGRAM BUDGET CATEGORY DEFINITIONS

101 Personnel: List the exact number of paid or in-kind staff members used in support of the proposed program, their title, percentage of time in the program and annual salary at 100% or FTE (full-time equivalent). Any change of salary status anticipated during the contract period must be listed.

102 Payroll Taxes & 103 - Fringe Benefits: Enter the appropriate payroll taxes and employee benefit costs for paid staff The rates for formulating totals should be shown. State if an employee is exempt. All benefits provided to paid staff must be shown as broken out on this form.

104 Travel: This category is for all staff or volunteer travel costs related to the program. Staff travel and operational travel (such as mileage paid for escort service) must be listed separately. Staff travel must be in support of the program. The mileage reimbursement rate for staff and operational travel must be shown under description of budget item, as follows
(Month x______ miles x________cents x________Staff____)

105 Training: This category refers to expenses incurred for paid staff and volunteer attendance at conferences, conventions and meetings that relate to the proposed program.

106 Equipment: Separate listings should be made in this category if equipment is to be purchased, or to be leased, and each item must be listed and described. If equipment is to be leased, indicate the cost per month. Also included in this category should be the cost of operations, repairs, and/or maintenance for equipment. Enter a separate listing for each item and indicate whether the cost is for operations, repairs and/or maintenance. Include the value of in-kind contributions.

107 Occupancy: Enter the cost and specifics of all building space and utilities charged to this program. Indicate square footage, monthly rent, and time duration of lease, if applicable. If utilities are not included in the rental agreement, indicate and list separately. In-kind contributions should be entered at the fair market value or rental rate.

108 Telephone: Enter the cost of telephone service necessary to support the program.

109 Consumable Supplies: Enter the cost of items which are regularly consumed, including: bank checks, accounting or program forms, paper and fluid for duplicating, pens, paper clips, etc.

110 Printing and Publications: Enter the cost of outside printing. If a special or regular printing or mailing is to be done, indicate as a separate line item (Project Brochure - 5,000 @ 12 cents per brochure). Enter the cost of publications that relate to the proposed program as a separate as a separate line item.

111 Postage: Enter the cost of postage for regular and special mailings.

112 Insurance: Record the cost of all insurance (except Workers Compensation or any employee health insurance) under this category, necessary to support the proposed program.

113 Other Costs: Enter additional cost items which cannot be assigned to any other category. Any item listed must be organization, amount, time period, and a brief description of the service

must be included. Some examples of other costs include audit, accounting, taxes, licenses, legal services and advertising.

114 Indirect Costs: This category is used only when the program is to be administered by an operating organization which is multi-operational. Indirect costs are those (a) incurred for a common or joint purpose benefiting more than one cost objective, and (b) not readily identifiable with the program itself, but which are nevertheless incurred by the contractor. In order to budget indirect costs, it is preferred that the contractor have an established indirect cost rate approved by the Department of Health and Human Services.

Sourcewise will allow indirect costs up to a maximum of 8% of direct costs, excluding in-kind contributions, capital equipment and contract services.