PART I – GENERAL INFORMATION

1. 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 2019–2020 fiscal year (July 1, 2019 through June 30, 2020), Sourcewise invites the submission of proposals for the provision of the following supportive services under **Title III D, Disease Prevention & Health Promotion Program**.

2. GLOSSARY OF TERMS

AAA: Area Agency on Aging. SOURCEWISE is a AAA.

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 proposal budget and work program become a part of the contract along with a complete statement of terms and conditions.

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 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 Share: The cash and/or in-kind contribution provided by the bidder organization.

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

a) Black–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, and a proportionate number of low-income ethnic minority elderly for the area served.

Unit of Service: The activity which describes the type of service to be contracted for and its required match.

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

3. TECHNICAL ASSISTANCE AND COORDINATION

(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.

(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.

(1) Commencing with 42 U.S.C. 3057g.

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.

4. GENERAL INFORMATION FOR BIDDERS

A. 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.

B. 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. No match is required.

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.

C. Equipment Availability:

List the model numbers, cost, age and condition of equipment that has been purchased with Older Americans Act one-time-only funds.

D. Contract Period:
The contract period for programs included in this RFP is a twelve-month period from July 1, 2019 through June 30, 2020.

E. 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.

F. 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.

5. 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 forms, bidders should review the following minimum program requirements. Bidders have no discretion in modifying these requirements; these requirements become a condition of any contract awarded for this service. The selected proposal shall become a part of the contract.

A. 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.

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 in the target population.

D. Recruitment and Training:
Bidders must demonstrate recruitment and appropriate training of staff and volunteers to support 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 procedures for obtaining the views of the participants of the service being provided.

G. 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.

H. 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.

LOCAL SOURCEWISE POLICIES

I. 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.

J. Late Proposal Submissions or Revisions:

Proposals submitted after the deadline will not be accepted.

K. 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 reports of various aspects of program activities according to a standard format on time. 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.

   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.

   Monthly detailed fiscal reports will be required for request of contract funds. All costs reported by the provider in monthly and final fiscal reports must be supported by appropriate accounting documentation.

3. A written grievance process for reviewing and attempting to resolve complaints of older individuals shall be included under Supporting Documentation of the proposal.

4. A transition plan for the termination or transfer of services shall be included under Part D Supporting Documentation of the proposal.

5. Prior to commencement of any work under this Agreement, the Contractor will be required to procure and maintain comprehensive general liability insurance of not 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, 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:

   a. $1,500,000 if seating capacity is 8-15
   b. $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 CONTRACTOR shall comply with all applicable orders and requirements issued under the following laws:
   c. Clean Air Act, as amended [42 USC 1857]
   d. Clean Water Act, as amended [33 USC 1368]
   e. Federal Water Pollution Control Act, as amended 33 USC 1251, et seq.]
   f. Environmental Protection Agency Regulations [40 CFR, Part 15] and [Executive Order 11738]
   g. Public Contract Code Section 10295.3
   h. Certification Regarding Lobbying Section 1352, title 31, United States code.

10. California Code Regulations relating to RFP process can be reviewed at: https://govt.westlaw.com/calregs/Browse/Home/California/CaliforniaCodeofRegulations?guid=I744DC110D4B711DE8879F88E8B0DAAAE&originationContext=documenttoc&transitionType=Default&contextData=(sc.Default)
11. California Code Regulations relating to program information can be reviewed at: https://govt.westlaw.com/calregs/Browse/Home/California/CaliforniaCodeofRegulations?guid=I69FD3880D4B711DE8879F88E8B0DAAAE&originationContext=documenttoc&transitionType=Default&contextData=(sc.Default)

12. Federal Regulations relating to the Older Americans Act can be reviewed at: http://www.aoa.gov/AoA_programs/OAA/index.aspx

13. Bidders can review Sourcewise's policy manuals, memorandums, and assessment/evaluation criteria and instruments with a written request submitted via regular mail or email to Sourcewise Chief Operating Officer, Manuel Altamirano (maltamirano@mysourcewise.com).

PART II – SUBMISSION OF PROPOSAL; GENERAL INFORMATION

1. SUBMISSION OF PROPOSAL

A. General Information

Part III of the RFP contains program standards for the Family Caregiver Support Program. Part IV contains the application. A separate and complete application must be submitted for each program. An original and five copies should be submitted in the order in which it is presented. 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. An authorized bidder representative may withdraw proposals by delivering a written request of withdrawal in person.

The bidder will bear all costs of developing the renewal 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.

B. Process of Preparing and Submitting a Proposal

1. The steps in the RFP process and the timeline for this process are listed below:

RFP available for applicants	March 31, 2019
Letter of Intent	April 12, 2019
Bidders Conference	April 15, 2019
Due date for proposals	May 6, 2019
RFP Evaluation	May 8-15, 2019
Evaluation Committee recommendations	May 17, 2019
Board of Directors approval	May 20, 2019
Notification of contract awards mailed	May 30, 2019
Deadline for appeals	June 10, 2019
Contract negotiations	June 17-20, 2019
Services begins	July 1, 2020

2. Step-By-Step Instructions
   The following instructions correspond with each of the steps above:

Step 1 Review the RFP available on the Sourcewise website: www.mysourcewise.com/area-plan.

Step 2 Letter of Intent must be submitted by April 12, 2019. All bidders must complete and return the letter of intent; partial submissions and alternative formats will not be accepted. The authorized signature must be in ink; copies will not be accepted. Letters of Intent are due to Sourcewise before 4:30 p.m. on the deadline and should be submitted to:

Sourcewise
Attn: Aneliza Del Pinal
2115 the Alameda
San Jose, CA 95125

Step 3 Attend the Bidders conference to receive detailed instructions and ask proposal-related questions. The Bidders conference will be held at Sourcewise on April 15, 2018 from 9:00 a.m.– 11:00 a.m. in Conference Rooms A&B.

Read more: http://www.businessdictionary.com/definition/bidder-s-conference.html

Step 4 Due Date for Proposal: All proposals must be submitted in a completed form no later than 4:30 p.m. on May 6, 2019. Proposals submitted after this deadline will not be accepted. Postmarked, 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 (1), and Governing board members (1). 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 Evaluation Committee will make recommendations 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: 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 Appeals must be made in writing to the CEO of Sourcewise within seven days of the notification of award, on June 10, 2019 and should be submitted to:

Sourcewise
Attn: Steve Schmoll
2115 The Alameda
San Jose, CA 95125

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

C. RFP Evaluation Criteria and Weighting

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

1. Program Description (54%)
   - 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.

2. Program Management (20%)
   - 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.

3. Budget (20%)
   - 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.

4. Supporting Documentation (8%)
   - Organizational Chart
   - 501 c3 designation
   - Job Descriptions
   - Board of Directors roster
   - Bond & Insurance information
   - Documentation of Emergency plan and client's grievance process
   - Transition plan for termination or transfer of services
   - Plan for additional and/or decreased funding.

PART III SUBMISSION OF PROPOSAL

1. PROGRAM STANDARDS

A. **Program Name:** Disease Prevention & Health Promotion

B. **Program Goal:** To promote the health and well-being of older individuals by assisting such individuals to gain access to disease prevention and health promotion services to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior.

C. **Program Definitions:**

Provide health risk assessments; routine health screening; nutrition counseling/education services; evidence-based health promotion; physical fitness, group exercise, music, art therapy, dance movement and programs for multigenerational participation; home injury control services; screening for the prevention of depression and coordination of other mental health services; medication management screening and education; gerontological and social service counseling; and education on preventative health services. Primary activities are normally on a one-to-one basis; if done as a group activity, each participant shall be counted as one contact unit.

D. Units of Service: Disease Prevention & Health Promotion is counted in units of contacts

E. Scope of Services and Funding

Funding available: $102,000

The maximum grant amount is $51,000 per contract.

F. Required Match N/A

G. Minimum number of units required: 775 per contract

H. Area to be Served: Santa Clara County

I. **Scope of Service:**

1. Provider shall target the delivery of Disease Prevention & Health Promotion at SOURCEWISE designated focal points and senior centers, with a priority emphasis on outreach in geographic areas with a high concentration of ethnic minority and low-income elderly. The remaining service effort may be delivered at other approved sites. Applicant will comply with standards outlined in the attached Program Memo dated 7/29/2015 from the California Department of Aging.

2. Provider shall present group training and education in areas of:

   i. Illness prevention.
   ii. Manage chronic physical conditions.
   iii. Promote healthy and independent living.
   iv. Improve older adults' quality of life.

3. Provider shall ensure service quality and maintain professional standards by:

   i. Comply with standards as outlined in attached Program Memo dated 7/29/2015 from the California Department on Aging.

4. Volunteers: Describe your methods for recruitment and training of volunteers in the proposed program; include: (a) the kinds of tasks that will be performed by volunteers and (b) the estimated number of volunteer hours during an average month.

5. Client Contributions: Describe your plan 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 the suggested client contribution and how it was determined, (c) the method used to collect and record client contributions to ensure confidentiality.

6. Client Input: Describe the process by which regular client input is received and areas that are monitored for quality of service.

7. Objectives: 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.

J. Program Description (54 points) - 4 pages maximum

1. Program description narrative must cover the following topics:

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

2. 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.

K. **Program Management (20 points)-** 3 page maximum

Program management narrative must cover the following topics:

a. Agency Experience: (a) Describe your organization, its purpose, goals and experience in delivering services to older persons in greatest social and economic need. (b) Describe your organization's experience in delivering the service for which you are applying. (c) Describe how the Title III program will be integrated into other agency services.
b. Facility: Describe the physical location(s) where the proposed service will be provided and the days and hours of operation.

c. Staff Qualifications: Describe the qualifications of the personnel to achieve the proposed objectives and reach the target population.
d. Training Plan: Describe the training plan for paid staff and volunteers.
e. Agency Support: Describe the resources to support the proposed services and steps to be taken to obtain funding from other sources.
f. Record Keeping: Describe the agency's ability to manage the fiscal and program record system and the resources to report MIS data electronically to the Sourcewise
g. Minority Organizations: Does your agency fit the definition of a minority organization?

L. **Budget** (18 points)

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.

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.

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

   b. **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.

   Example of Non-federal Matching Sources:

   1. Revenues from city, county and state sources;
   2. Revenues from private organizations;
   3. Individual contributions not tied to receiving service;
   4. United Way revenues;
   5. Revenue sharing;
   6. Volunteer services, space, consultants, and any sources.

3. **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.

4. **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:

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 10% of direct costs, excluding in-kind contributions, capital equipment and contract services.

Selection is based on the highest overall scores. A scorecard is included.

M. **Supporting Documentation** (8 points)

1. Attach a copy of the agency's organizational chart including the proposed program.
2. Attach job descriptions of the staff that will be paid with Title III funds.
3. Attach a roster of the agency Board of Directors.
4. Attach the following applicable certificates of insurance; fidelity bond, general liability, private vehicle insurance, project vehicle insurance, worker's compensation insurance.
5. Maintain a written Emergency Operations Plan that can be activated in an emergency. 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.
6. Include a written grievance process for reviewing and attempting to resolve complaints of older individuals.
7. Prepare a transition plan for the termination or transfer of services.
8. Prepare contingency plans for an increase or decrease in Funding:
    a. Describe how additional funds would be used if additional funds become available
    b. Describe how services would be reduced due to a reduction of funds

N. **Terms and conditions**

1. 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.

2. 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.

3. 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.

4. 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 Aneliza Del Pinal adelpinal@mysourcewise.com no later than 4:30 pm on Friday May 3, 2019. Sourcewise shall not be responsible for, nor be bound by any oral instructions, interpretations or explanations issued by any representative of the agency.

5. 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.

6. 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.

7. 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.

8. 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.