

SOURCEWISE INVITATION FOR BID & REQUEST FOR PROPOSAL PROCEDURE: OLDER ADULTS RECOVERY AND RESILIENCE (OARR)

The Sourcewise Invitation for Bid & Request for Proposal Procedure (IFB/RFP Procedure) provides detailed instructions describing the funding requirements and program requirements to support bidders through the proposal development and submission process. Organizations interested in submitting a Request for Proposal (RFP) can find the required templates for the available funding opportunities on the Sourcewise website at <https://www.mysourcewise.com/about/grantees/>. Interested entities should be able to successfully respond to the Older Adults Recovery and Resilience (OARR) IFB/RFP application submission requirements outlined in the IFB/RFP procedure.

The Older Adults Recovery and Resilience (OARR) funding was approved to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19 pandemic. Sourcewise is administering the Invitation for Bid/Request for Proposal for OARR funding to partner with qualified Santa Clara County agencies. OARR funding is a one-time allocation that must be used for eligible activities, such as to support intergenerational activities. Examples of intergenerational activities include cooking demonstrations, shared garden site development and maintenance, and social activities related to the Older Californians Nutrition Program (OCNP).

All interested applicants who serve Santa Clara County, 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 (CDA). All recipients of funds that are private agencies must be incorporated to safeguard the interests of the CDA and Sourcewise. Private individuals are not eligible to apply for this grant.

Beginning on April 1st, 2023, through December 31, 2023, Sourcewise invites the submission of proposals to secure contracts with qualified seniors and informal caregiver service providers through the OARR IFB/RFP. OARR funding is available for expenditure through December 31, 2023. Interested applicants through the IFB/RFP submission process should be able to:

- Successfully respond to and the Invitation for Bid (IFB)/ Request for Proposal (RFP) application submission requirements.
- Identify how the funding will be used to respond to strengthen older adults' recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19 pandemic.
- Successfully respond to the Older Adults Recovery and Resilience (OARR) Title III service funding specifications and program specific requirements outlined in the IFB/RFP Procedure. Reference Section II. Funding Specifications A - C.
- Clearly identify how the applicant plans to advance equity and address systemic racism by demonstrating how the needs of California's diverse and underserved communities will be responded to with the awarded OARR funding.
- Adhere to Sourcewise and State OARR data reporting requirements including monthly unit of service and unduplicated clients served.

Sourcewise invites the submission of proposals for the provision of the following supportive service projects to communities that are within the definition of greatest economic and greatest social need:

- (4) INTERGENERATIONAL ACTIVITIES FUNDING SPECIFICATION (Title III C-1 Congregate Intergenerational Activities)
- (4) INTERGENERATIONAL ACTIVITIES FUNDING SPECIFICATION (Title III C-2 Home-Delivered Intergenerational Activities)
- (2) SENIOR LEGAL SERVICES FUNDING (Title III B-Legal Assistance)

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SECTION 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 and caregivers 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.

SECTION II. FUNDING SPECIFICATIONS

Please read through each funding specification carefully.

A. INTERGENERATIONAL ACTIVITIES AND OLDER CALIFORNIAS NUTRITION PROGRAM FUNDING SPECIFICATION

OARR Service Name: Title III-C-1, Congregate Intergenerational Activities

Program Definition & Goal: The OARR funding is intended to the planning, development, and implementation of activities and programs that bring participants of the Older Californians Nutrition Program (OCNP) together with children or adults. Mutually beneficial intergenerational activities promote greater understanding and respect between generations and also strengthen older adult's recovery and resilience from the isolation and health impacts from the COVID-19 pandemic.

Service Definition: The Title III-C-1 Congregate Intergenerational Activities is intended to support in developing partnerships and efforts, including the planning, development, and implementation of intergenerational activities that connect participants with younger generations. Mutually beneficial intergenerational activities promote greater understanding and respect between generations and strengthen older adult's recovery and resilience from the isolation and health impacts from the COVID-19 pandemic.

Additionally, services may include meals. Each meal shall provide one-third (1/3) of the Dietary Reference Intakes (DRI) and comply with the most current Dietary Guidelines for Americans (DGA). To be an eligible Title III C-1 congregate nutrition site, the site must meet all of the following criteria: [22 CCR 7638.7(a)]

Service Type: Registered Service

Area to be Served: Santa Clara County

Service Area Target Population: All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19. Priority will be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

Scope of Service, Funding & Service Standard:

Funding available¹: \$200,609

Limit funding request: \$50,152.25

Required Match: No Match Required

Title III-C-1 Congregate Intergenerational Activities

Program Specific Scope of Service:

1. Conduct services and activities that support the goal to pursue and conduct intergenerational activities for the purpose of connecting older adults with children/adults in conjunction with the OCNP. Examples of intergenerational activities include, but are not limited, the following:
 - a. Development or maintenance of partnerships and collaborative efforts with programs serving children to foster intergenerational connections between older adults and children;
 - b. Planning, development, or implementation of shared sites with programs serving meals to children to promote intergenerational meal programs;
 - c. Planning, development, or implementation of intergenerational cooking demonstrations or classes;
 - d. Planning, development, or implementation of shared garden site and intergenerational gardening activities;
 - e. Virtual or in-person intergenerational social activities related to the C-1
2. OARR funding may be used to provide meals for participants in activities that support intergenerational connections, however, OARR funding may not supplant funds that would otherwise be available for other nutrition programs.
3. Promote and maintain high standards of food safety and sanitation as required by the California Retail Food Code.
4. Provide meals in accordance with the OAA and California Code of Regulations (CCR).

Reporting Requirements:

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

This funding is separate from all other Title III C/OAA funding and must be tracked separately. Monthly Expenditure reporting includes following categories:

- o The service units (activities) and unduplicated client count for Congregate Intergenerational Activities (C-1) provided to OCNP clients using OARR funds.
- o The service units and estimated participant count for meals provided to intergenerational participants who are ineligible for OCNP meals.

In addition, Quarterly submission of a brief one-page narrative answering the following five prompts:

- o Describe the services provided this quarter.
- o Describe the demographics of the participants
- o Describe any successes and challenges. If there were challenges, describe any action taken to address them.
- o Describe any service collaboration efforts.
- o Describe any capacity building strategies.

B. INTERGENERATIONAL ACTIVITIES AND OLDER CALIFORNIAS NUTRITION PROGRAM FUNDING SPECIFICATION

OARR Service Name: Title III-C-2, Home-Delivered Intergenerational Activities

Program Definition & Goal: The OARR funding is intended to the planning, development, and implementation of activities and programs that bring participants of the Older Californians Nutrition Program (OCNP) together with children or adults. Mutually beneficial intergenerational activities promote greater understanding and respect between generations and also strengthen older adult's recovery and resilience from the isolation and health impacts from the COVID-19 pandemic.

Service Definition: The **Title III-C-2 Intergenerational Activities** is intended to support the developing partnerships and efforts, including the planning, development, and implementation of intergenerational activities that connect OCNP participants with younger generations. Mutually beneficial intergenerational activities promote greater understanding and respect between generations and strengthen older adult's recovery and resilience from the isolation and health impacts from the COVID-19 pandemic.

Additionally, funding may be used to provide meals. Each meal shall provide one-third (1/3) of the DRI and comply with the most current DGA. [22 CCR 7135, 22 CCR 7638.7(c)]

Service Type: Registered Service

Area to be Served: Santa Clara County

Service Area Target Population: All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19. An emphasis must be made to provide services to vulnerable communities including LGBTQ+, Hispanic/Latino, Black/African American and/or Asian-American adults aged 60 and over.

Scope of Service, Funding & Service Standard:

Funding available: \$671,603

Limit funding request: \$167,900.75

Required Match: No Match Required

Title III-C-2 Intergenerational Activities

Program Specific Scope of Service:

1. Conduct services and activities that support the goal to pursue and conduct intergenerational activities for the purpose of connecting older adults with children/adults in conjunction with the OCNP. Examples of intergenerational activities include, but are not limited, the following:
 - a. Development or maintenance of partnerships and collaborative efforts with programs serving children to foster intergenerational connections between older adults and children;
 - b. Planning, development, or implementation of intergenerational cooking demonstrations or classes;
 - c. Planning, development, or implementation of shared garden site and intergenerational gardening activities;
 - d. Virtual or in-person intergenerational social activities related to the C-2 program;
 - e. Virtual or in-person adult lunch companion for C-2 participants.
2. Provide meals for participants in activities that support intergenerational connections, however, OARR funding may not supplant funds that would otherwise be available for other nutrition programs.
3. Promote and maintain high standards of food safety and sanitation as required by the California Retail Food Code.
4. Provide meals in accordance with the OAA and California Code of Regulations (CCR).

Reporting Requirements:

The agency shall demonstrate an effective data management and record retention process and procedure to capture participant eligibility to fulfil the reporting requirements.

This funding is separate from all other Title III C/OAA funding and must be tracked separately. Monthly Expenditure reporting includes following categories:

- o The service units (activities) and unduplicated client count for home-delivered (C-2) meals provided to OCNP clients using OARR funds.

- o The service units and estimated participant count for meals provided to intergenerational participants who are ineligible for OCNP meals.

In addition, Quarterly submission of a brief one-page Narrative answering the following five prompts:

- o Describe the services provided this quarter.
- o Describe the demographics of the participants
- o Describe any successes and challenges. If there were challenges, describe any action taken to address them.
- o Describe any service collaboration efforts.
- o Describe any capacity building strategies.

C. SENIOR LEGAL SERVICES FUNDING

OARR Service Name: Title III-B Legal Assistance

Program Goal: To expand existing legal services that assist older adults, and older adults with disabilities- Age 60+ and Low-Income factors, with a variety of legal problems concerning housing, consumer fraud, elder abuse, Social Security, Supplemental Security Income (SSI), Medicare, Medi-Cal, age discrimination, pensions, nursing homes, protective services, conservatorships, and other matters.

Service Definition: The Title III-B Legal Assistance means legal advice and representation provided by an attorney to older individuals with economic or social needs. This would include to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and counseling or representation by a nonlawyer were permitted by law (42 U.S.C. § 3002(33).) Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

Service Type: Non-Registered Service

Area to be Served: Santa Clara County

Service Area Target Population: All contracts are required to provide services to older individuals with the greatest economic and social need, with particular attention to low-income individuals, low-income minority individuals, older individuals residing in rural areas, with limited English proficiency, with severe disabilities (physical and/or mental), isolated because of sexual orientation or gender identity, at risk for institutional placement, or other isolated older individuals. [45 CFR 1321.71(c)(5)]

Priority will be given to legal assistance related to income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination. [OAA 307.11(E)]

Scope of Service, Funding & Service Standard:

Funding available: \$608,279

Limit funding request: \$304,139.5

Minimum units delivered based on funding request: 400 hours

Unduplicated Persons Served estimate*: 48

* The actual unduplicated persons goal is defined by the applying agency in the proposal submitted. Estimates are shared by the grant administrator to assist the applying agency.

Unit of Service: 1 hour = 1 unit of service

Required Match: No Match Required

Legal Assistance Services

Program Specific Scope of Service:

1. Make legal assistance available and accessible, at no cost, throughout the targeted groups identified.
2. Priority to legal assistance related to the following areas:
 - a. Income.
 - b. Health care.
 - c. Long-term care.
 - d. Nutrition.
 - e. Housing.
 - f. Utilities.
 - g. Protective services.
 - h. Defense of guardianship or conservatorship.
 - i. Abuse.
 - j. Neglect.
 - k. Age discrimination.
3. Primary focus shall be the direct representation of older individuals in legal matters.
4. Specific techniques to be used to make potential clients aware of the legal assistance that will be provided.
5. All attorneys providing legal assistance must be licensed and in good standing to practice law in the State of California and shall carry malpractice insurance. Legal assistance may be provided by law students or paralegals only under the direct and regular supervision of a licensed attorney.
6. Funds received shall be used to maintain and/or increase the level of legal assistance furnished to older individuals. Funds shall not be used to supplant funds from other federal or non-federal sources.

Reporting Requirements:

This funding is separate from all other Title III B funding and must be tracked separately. **Monthly Expenditure reporting** includes following categories:

- o Number of service units delivered
- o Number of persons served
- o Total expenditure amount

In addition, Quarterly submission of a brief one-page Narrative answering the following five prompts:

- o Describe the demographics of the participants
- o Describe any successes and challenges. If there were challenges, describe any action taken to address them.
- o Describe any service collaboration efforts.
- o Describe any capacity building strategies.

SECTION III. GLOSSARY OF TERMS

OARR: Older Adults Recovery and Resilience [Older Americans Act]

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 (Planning and Service Area). 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' and 'service provider.'

CDA: California Department of Aging

Contract: An official document binding both parties regarding the Title III OARR program and services to be provided. The selected proposed budget and Title III 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.

Evaluation Committee: A team of evaluators comprised of members of the Sourcewise Board of Directors and Sourcewise Advisory Council that assess and score RFP submissions based on a predetermined proposal grading rubric.

Focal Point: A designated senior center in PSA 10 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, HIV 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.

Intergenerational Activities: Are the efforts related to the planning, development, and implementation of activities and programs that bring participants of the Older Californians Nutrition Program (OCNP) together with children or adults. Mutually beneficial intergenerational activities promote greater understanding and respect between generations and strengthen older adult's recovery and resilience from the isolation and health impacts from the COVID-19 pandemic.

Matching Contributions: No Match Required.

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 that has been granted tax-exempt status by the Internal Revenue Service.

Non-registered Services: Are those services where it is not practical to collect client specific information or when requiring the client to register may serve as a barrier to receiving service.

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

Older Californians Nutrition Program (OCNP): means the Title III C-1 Congregate Nutrition Services and Title III C-2 Home-Delivered Nutrition Services.

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

PSA: Planning and Service Area (PSA). PSA defines the geographic region which the AAA encompasses.

Registered Services: Means data collection and reporting requirements including unduplicated client counts by characteristics, units of service, including in some cases ADLs/IADLs. Registered Services are client specific data using participant identification numbers for each client.

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.

Service Provider: A term used to describe the bidding organization and used interchangeably with the 'bidder' and 'applicant'.

Subcontractor: The legal entity that is identified in the bidders OARR application to carry out part of the award to meet the unit of service requirements and/or program objectives outlined in the IFB/RFP Procedure. A subcontractor is upheld to similar program/administrative requirements as outlined by in the Sourcewise contract, if awarded.

Target Population: Persons 60 years and older who are disproportionately affected by COVID-19 including the greatest social need, the greatest economic need, with particular attention to low-income minority older individuals, older individuals with Limited English Proficiency (LEP), LGBTQ+ older adults and older individuals residing in rural areas. All contracts are required to provide services to communities disproportionately affected by COVID-19.

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 April 1st, 2023 – December 31, 2023. Agency's submitting proposals are required to include an unduplicated person count to provide services. Reporting requirements are described and nonnegotiable for registered and non-registered OARR funded Older American Act services.

Vendor: A legal entity which applies or receives funding to sell goods and service for Area Agency/subcontractor to benefit the consumers (older adults and caregivers). As it relates to the RFP

process vendors are not responsible for carrying out administrative/programmatic requirements of the program, unless otherwise negotiated if awarded.

Voluntary Contributions: The successful bidder should (a) inform the client of the opportunity to voluntarily contribute to the cost of service, including but not limited to the cost-of-service delivery, related activities to facilitate access to meals, (b) describe the amount of suggested client contribution and how it was determined, and (c) explain the method used to collect and record client contributions.

SECTION IV. SOURCEWISE TECHNICAL ASSISTANCE AND COORDINATION²

- (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 Sourcewise. The assistance shall be based upon both of the following:
 - (1) Sourcewise assessment findings of the service providers.
 - (2) Requests made by service providers.
- (b) In addition to (a), Sourcewise 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 Sourcewise. 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.

SECTION V. GENERAL INFORMATION FOR SOURCEWISE INVITATION FOR BID & REQUEST FOR PROPOSAL

- 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/or Federal Government and is subject to change. Funding is contingent upon the availability of federal funds.

Additionally, one-time-only funding may become available for this project; however, one-time-only funding is not guaranteed.

- B. Ensuring Equity in Program Planning & Delivery: Programs, services, and activities must be very specific and explicit about the communities they are attempting to address. “Communities of color” or generic “diversity” language weakens and takes power away from the recommendation and the groups we aim to serve. To be explicit in terminology provides power to the group that has been systemically underrepresented or misrepresented.

The strengths and assets of each community must be highlighted and used to help us to move in culturally appropriate and inclusive ways.

Systemic racism, ageism, able-ism, and sexism can only be eliminated through systemic solutions. Programs and/or services should strive to transform the systems that impact the lives of those most affected by systemic and institutionalized discrimination and who, therefore, have experienced the most profound and adverse impacts during COVID-19.

Programs and/or services should not unintentionally further exacerbate inequities experienced by some communities. View Appendix B.

- C. Matching Contribution Requirement by Title III Service for OARR RFP: No Match Required.

- D. Program Support: The intent of this funding is to strengthen older adult’s recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19 pandemic.

- E. Equipment Monitoring and Availability: Submit the model numbers, cost, age and condition of equipment that has been purchased with OARR funding and will be monitored during the funding period.

Equipment/Property with per unit cost over \$5,000 or any computing devices, regardless of cost requires justification from the Contractor and approval from Sourcewise and must be included in its OARR approved budget.

- F. Contract Period: The contract period for programs included in this RFP is a Nine-month period from April 1st, 2023, through December 31, 2023. This is a one-time only contract with no renewal option.

- G. 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.

- H. Multiple Contract Awards: Sourcewise reserves the right to enter multiple contracts for any program at a lesser amount than listed in the Request for Proposal specifications.

- I. Negotiations: Sourcewise may require the applicant to participate in negotiations, and to submit revisions to pricing, technical information, and/or other items from their proposal(s) as may result from these negotiations.
- J. Contingencies: Sourcewise reserves the right to issue an addendum or amendments to this RFP and to terminate this procurement process at any time.

SECTION VI. 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 2016, 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 in this section. All general OARR program requirements are defined. Bidders define the specific and measurable objectives to satisfy each goal requirement in the submitted proposal using the defined application template. 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 that has been selected to assure that all necessary program requirements are met. The awarded proposal will become a part of the contract agreement for services and monitored throughout the year by Sourcewise to ensure the minimum requirements for the award are satisfied.

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) Sourcewise 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:

The bidder shall describe the formation and administration of cooperative agreements with local senior and caregiver community-based agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services in response to COVID-19.

C. Public Information and Outreach:

The bidder shall coordinate the development of information and outreach activities (in-person and virtual events), including distribution of printed/electronic materials co-branded with funding agency (Sourcewise) to promote services to target populations in the community.

Awarded bidder must ensure that programs and services are available to all older adults regardless of sexual orientation and gender identity. Evaluation of outreach efforts to gay, lesbian, bisexual, and transgender older adults will be included in the contract monitoring requirements.

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.

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

E. Client Input:

Service providers must have procedures in place for obtaining the views of the participants of the service being provided.

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

F. Client Contributions:

Only if serving meals will the bidder be required to provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OARR funded program.

Bidder shall 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.

SECTION VII. LOCAL SOURCEWISE POLICIES

1. **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 and communities who have been disproportionality impacted by COVID-19.
2. **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 vulnerable populations.
3. **Late Proposal Submissions or Revisions:** Proposals submitted after the deadline will not be accepted.
4. **Contract Award Requirements:** The following are additional contractual obligations for all Sourcewise contractors that will influence the submission of a proposal:
 - a. **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 based on the awarded agency submitted proposal.
 - b. **Program, Fiscal Reporting, and Record Keeping:** Service providers will be required to submit monthly reports on various aspects of program activities in accordance with Sourcewise and OARR 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 to 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.

All OARR awarded service providers are required to submit monthly detailed fiscal reports on the 15th day of the month for the most recent month to request payment of contract funds. For example, January invoice is due on February 15th. All costs reported by the provider in monthly and final fiscal reports must be supported by appropriate accounting documentation. In addition, quarterly narrative reports are required to be submitted on the 10th day of the month for the most recent Quarter. For example, Quarter two Narrative is due on January 10th.

- c. **Grievance Procedure:** The agency is required to submit a written grievance process for reviewing and attempting to resolve complaints of older individuals or caregivers receiving services funded by OARR in compliance and as defined by Sourcewise include in the process outlined below at minimum:
 - i. Complaints may involve, but not be limited to, any or all of the following:
 1. Amount or duration of a service.
 2. Denial or discontinuance of a service.
 3. Dissatisfaction with the service being provided or with the service provider.

*If the complaint involves an issue of professional conduct that is under the jurisdiction of another entity, such as the California Medical Board or the State Bar Association, the complainant shall be referred to the proper entity.
 - ii. Ten-day time frames within which a complaint will be acted upon.
 - iii. Written notification to the complainant of the results of the review, including a statement that the complainant may appeal to the AREA AGENCY if dissatisfied with the results of the Contractor's review.
 - iv. Confidentiality provisions to protect the complainant's rights to privacy. Only information relevant to the complaint may be released to the responding party without the older individual's consent.

- d. Information Integrity & Data Security: The awarded bidder, including potential subcontractors and vendors shall have in place operational policies, procedures and practices to protect State information assets, including those assets used to store and access Personal Information (PI), Personal Health Information (PHI), and any information protected under the Health Insurance Portability and Accountability Act (HIPAA), (i.e. public, confidential, sensitive and/or personal identifying information).
- e. Security Awareness Training: The awarded bidder, potential subcontractors and vendor employees and volunteers must complete the required California Department of Aging Security Awareness Training within 30 days of the contract start date. Any new employees and/or volunteers hired throughout the duration of the contract are also required to complete the required training within the first 30 days. These details will be included in the awarded bidders contract agreement.
- f. 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
- g. Audited Financial Statements & Single Audit Requirement: Service providers will be required to submit to Sourcewise an audit of expenditures made under the OARR contract award. This audit must be conducted by an independent auditor or auditing firm in accordance with federal guidelines and must specifically identify revenue, expenditures and program income from the Sourcewise OARR funded 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).

The funding source (Federal Grantor) for the following programs is the U.S. Department of Health and Human Services, Administration for Community Living. Passthrough agency is Sourcewise.

- 93.044 Older Adults Recovery and Resilience, 2022, Legal Services Title III-B.
- 93.045 Older Adults Recovery and Resilience, 2022, Nutrition Services; Congregate Intergenerational Activities (C-1)

- 93.045 Older Adults Recovery and Resilience, 2022, Nutrition Services; Home Delivered Intergenerational Activities (C-2) Title III-C2
- h. 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.
- i. 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.
- j. Contractors and Sub-contractors: Contractors may implement service agreements or subcontracts with goods and/or service providers (vendor). Subcontractors must be qualified to provide the service purchased and to operate in compliance with program requirements and all subcontracts must be pre-approved by Sourcewise. Signed letters of agreement to participate must accompany the proposal. Copies of the final signed subcontracts and agreements must be submitted to Sourcewise with the contract. Subcontract and agreements must have the approval of Sourcewise before activation and the Contractor/Grantee must monitor the performance of the subcontractor.
5. Applicants will be required to conform to all applicable provisions of the law and regulations. These shall include, but are not limited to the following:
- Older Americans Act of 1965, as amended;
 - Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970;
 - Mello-Granlund "Older Californians Act" of 1996;
 - California Code of Regulations, Title 22 (Social Security), Division 1.8 (California Department of Aging), Chapter 4 (Title III Programs-Program and Service Provider Requirements), §7630 through §7638.13 (pages 174.21 through 174.27) of Register 2002, No. 2; 1-11- 2002;
 - Code of Federal Regulations (CFR), Title 45, Part 74 (Administration Request for Proposals (RFP))
 - OMB Circulars A-87, A-102, A-110, A-122, and A-133; Section 15630, Welfare & Institutions: https://obamawhitehouse.archives.gov/omb/grants_circulars
 - Code Reporting Requirements for Elder & Dependent Adult Abuse;
 - Federal Civil Rights Act of 1964, 1968 and 1991;
 - Rehabilitation Act of 1973; State law contained in W&I Code, Section 9542;
 - California Fair Employment and Housing Act;
 - Education Amendments of 1972;
 - Federal, State and County and regulations applicable to Affirmative Action and Sexual Harassment;
 - Sourcewise Provider Manual;
 - California Department of Aging (CDA) Program Memos available at www.aging.ca.gov/pm

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](#).

For additional information related to federal Office of Management and Budget Administrative and Cost

Policy circulars reference [here](#).

Bidders can review Sourcewise Policy & Procedure Manual, memoranda, 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).

SECTION VIII: REQUEST FOR PROPOSAL GENERAL INFORMATION

I. SUBMISSION OF PROPOSAL

The program specific requirements for each service included in the OARR Request for Proposal are available on the Sourcewise website at: <https://www.mysourcewise.com/about/grantees/>.

An application is required to be completed for each program. When the bidding agency submits the application, an original hard copy, plus four hard copies should be submitted in the order in which it is presented. One electronic version of the complete proposal should be submitted to rcorral@mysourcewise.com by the defined due date below.

The Sourcewise OARR Application is available on the Sourcewise website at: <https://www.mysourcewise.com/about/grantees/>.

The bidder will bear all costs of developing the proposal and submitting one original and four 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 RFP 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 signed request of withdrawal by email to Raul Corral, at rcorral@mysourcewise.com identifying as an email of high importance.

II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below. The due dates are specific, please review carefully and plan accordingly. Detailed steps describing the RFP process is available on Page 18 – 21 of the procedure.

Timeline for OARR Request for Proposal

Letter of Intent Due	Friday, January 20 th , 2023, at 4PM
Bidders Conference	Wednesday, January 18 th , 2023
Due date for proposals (must be received by Sourcewise)	Wednesday, February 8 th , 2023, at 4PM
RFP Evaluation	Monday, February 13 th – Friday, February 17 th , 2023
Notification of contract award mailed & emailed	Friday, March 10 th , 2023
Deadline for appeals	Friday, March 17 th , 2023
Contract negotiations and signature	Friday, March 10 th – Friday, March 17 th 2023
Services delivery start date	Saturday, April 1 st , 2023

III. STEP BY STEP INSTRUCTIONS

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

Step 1 Letter of Intent Submission:

The Letter of Intent is required to be submitted by the bidder on/or before Friday, January 20th, 2023, to Sourcewise at 4:00 p.m. electronically to Raul Corral at rcorral@mysourcewise.com.

The authorized signature is acceptable in two formats: (1) ink signature and scanned or (2) signed electronically using DocuSign or Adobe Acrobat with authentic digital signature submit the signed Letter of Intent to Raul Corral at rcorral@mysourcewise.com. All bidders must complete and return the letter of intent; partial submissions and alternative formats will not be accepted.

Step 2 Bidders Conference:

Attend the Bidders conference scheduled on Wednesday, January 18th, 2023, at 11:00 a.m. via teleconference.

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[+1 661-271-0327](tel:+16612710327), [800156873#](tel:+1800156873) United States, Santa Clarita

Phone Conference ID: 800 156 873#

To learn more about the purpose of a bidders conference visit: <https://www.findrfp.com/Government-Contracting/bidders-conference.aspx>

Step 3 Proposal Submission:

Complete paper & electronic proposals must be submitted to Sourcewise or they will not be considered for funding on Wednesday, February 8th at 4:00 p.m. The below submissions are required:

- Emailed: One (1) complete electronic proposal submitted by email to Raul Corral at rcorral@mysourcewise.com.
- Mailed: One (1) original and four (4) hard copies should be delivered or mailed to Sourcewise at, 3100 De La Cruz Blvd, Suite 310, Santa Clara, CA 95054

Proposals submitted after this deadline will not be accepted. Postmarked or faxed submissions are not acceptable.

Step 4 Proposal Evaluation:

The Sourcewise RFP Evaluation Committee evaluates and scores the proposals based on the criteria outlined in the Request for Proposal and submits the recommendation to the Sourcewise Board of Directors. Members of the Evaluation Committee are comprised of Advisory Council members and Governing board members. The Evaluation Committee members will evaluate all proposals to determine responsiveness to this RFP. The committee will recommend selection of a candidate bidder for final approval and negotiation of a contract to the Sourcewise Board of Directors. Proposals will be evaluated on the bidder's ability to meet the specifications, terms, and conditions of the RFP. Each evaluation committee member scores each proposal independently using a predefined rubric that resembles the RFP Proposal Submission criteria outlined in Part (A) – Part (D) on page 25 – 28 of this document. Recommendations from the evaluation committee are based on the highest scores.

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 that time.

RFP Recommendation:

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

Board of Directors Approval:

The Sourcewise Board of Directors makes the final decision to select the contractors for award and non-award(s).

Step 5 Notification of Award:

A notification will be sent to both successful and unsuccessful applicants. A notice of adverse determination will be provided by Sourcewise and will

1. Be in writing and delivered by either of the following methods:
 - Faxed or emailed with a mailed follow-up original.
 - Certified or overnight mail return receipt requested.
2. Describe the grounds for the adverse determination in sufficient detail to enable the applicant to respond.

Step 6 Deadline of Appeals and Process:

Must be made in writing to the CEO of Sourcewise and must identify which of the perceived deviations Sourcewise allegedly did not adhere to as specified in 22 CCR § 7704(c)(3)(a-c) within five business days of the notification of award, Friday, March 17th, 2023 at 4 p.m.

Step 7 Contract Negotiations:

As part of the review process, the evaluation committee and the Board of Directors may require modifications or revisions to a proposal, including revisions to pricing, technical information, and/or other items from bidders proposal(s). This assures that all necessary program requirements are covered before the contract is signed.

Step 8 Service Begins:

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

SECTION IX: RFP SUBMISSION OF PROPOSAL GUIDANCE AND EVALUATION CRITERIA

Proposals will be evaluated according to the criteria outlined below for each section of the proposal. There is a possible 100 points (100%) available.

Part A I & II: Program Description (50 points)

I. Program description narrative must cover the following topics:

- Adequacy of plan and methodology to provide proposed services within required program specifications. (7 points)
- Adequacy of plan to provide equitable access to services for minority persons in greatest economic need proportionate to the total elderly population served. (7 points)
- Adequacy of funding requested to respond to community service needs as described in the IFB/RFP Procedure, minimum level of service. (5 points)
- Comparison of program objective and units of service to those specified in the RFP. (7 points)
- Structure of bidder's organization and staffing patterns of paid staff and volunteers and its potential impact on achievement of proposed objectives and serving target population in partnership with Sourcewise. (7 points)
- Adequacy of training plan for staff and volunteers. (2 points)
- Demonstration of appropriate bidder linkage and coordination with local community-based organizations and resources to increase cost effectiveness and reduce duplication of service. (4 points)
- Adequacy of public information and outreach plan to adequately publicize the program to the community and target population based on parameters outlined in RFP. (3 points)
- Capability of bidder process to work with and encourage client input in program evaluation. (4 points)
- Adequacy of bidder's plan to solicit and collect client contributions. (4 points)

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

A. Targeting

Title III C-1 Congregate Intergenerational Activities Targeted Population definition

All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19.

Title III C-2 Home-Delivered Intergenerational Activities Targeted Population definition

All contracts are required to strengthen older adult's recovery and resilience from the severe isolation and health impacts from staying at home due to the COVID-19.

Title III B Legal Assistance Targeted Population definition

1. To expand existing legal services that assist older adults, and older adults with disabilities, with a variety of legal problems concerning housing, consumer fraud, elder abuse, Social Security, Supplemental Security Income (SSI), Medicare, Medi-Cal, age discrimination, pensions, nursing homes, protective services, conservatorships, and other matters.
2. Priority to legal assistance related to the following areas:
 - a. Income.
 - b. Health care.
 - c. Long-term care.
 - d. Nutrition.
 - e. Housing.
 - f. Utilities.
 - g. Protective services.
 - h. Defense of guardianship or conservatorship.
 - i. Abuse.
 - j. Neglect.
 - k. Age discrimination.

B. Staffing & Volunteers

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

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Adults Recovery and Resilience (OARR) and the kinds of tasks that will be performed by volunteers.

C. Coordination

The bidder shall describe the formation and administration of cooperative agreements with local senior and caregiver community-based agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services in response to COVID-19.

D. Public Information/Outreach

The bidder shall coordinate the development of information and outreach activities (in-person and virtual events), including distribution of printed/electronic materials co-branded with funding agency (Sourcewise) to promote services to target populations in the community.

Awarded bidder must ensure that programs and services are available to all older adults regardless of sexual orientation and gender identity. Evaluation of outreach efforts to gay, lesbian, bisexual, and transgender older adults will be included in the contract monitoring requirements.

E. Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided.

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

F. Client Contributions:

Only if serving meals will the agency be required to provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OARR funded program.

Bidder shall 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 (27 points)

I. Program Management narrative must cover the following topics:

- Experience of bidder, particularly in providing the proposed services. (4 points)
- Experience of bidder in serving older persons particularly the target population. (4 points)
- Adequacy of bidder's facility to accomplish the proposed program. (4 points)
- Adequacy of bidder's plan to self-evaluate and monitor proposed objectives in accordance with program requirements. (4 points)
- Capability of bidder's plan to obtain additional funding support from private and other public sources. (2 points)
- Adequacy of bidder's system of record keeping and data collection for evaluation purposes. (4 points)
- Status as a minority provider. (1 point)
- Using the Dietitian Principles for Delivery (4 points)

• **Note:** Title III B Legal Services the 4 points allocated for Dietitian Principles for Delivery will be redistributed to the four sections in Part B Program Management: •Experience of bidder, particularly in providing the proposed services. (5 points) •Experience of bidder in serving older persons particularly the target population. (5 points) •Adequacy of bidder's facility to accomplish the proposed program. (5 points) •Adequacy of bidder's plan to self-evaluate and monitor proposed objectives in accordance with program requirements. (5 points)

Part C: Budget (14 points)

I. The program budget template is located on the Sourcewise website here:

<https://www.mysourcewise.com/about/grantees/>. The proposed program budget will be scored based on the agency's ability to include:

- Reasonable estimated cost of proposed program (3 points)
- Demonstrate reasonable allocation of bidders Title III C or Title III B proposed request for grant funds in the program budget to administer direct services, compared to administrative and indirect costs. (3 points)
- Description of cost-effective strategies, including policies and procedures of bidding agency as it relates to the total request for grant funds and program cost. (4 points)
- Comparison of total program costs with program objectives (outlined in Part A, II) and units of service for geographic area to be served. Reference objectives above to allocate costs to successfully meet objectives. (4 points)

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 dollar amount of OARR funds, other sources of cash, anticipated program income (if expected) 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. OARR Funds Requested: This column reflects the actual OARR funding amount from Sourcewise. The total of this column must equal the amount of funding provided for the program as specified in the Section II. Funding Specifications of the applicable Title III service.
2. Matching Contribution Requirement by Title III Service: No Match Required.
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.
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 in the detailed breakdown. Refer to the definition of each funding source as outlined above.

A detailed breakdown of budget 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 (9 points)

I. Include the following:

- Organizational Chart: Attach a copy of the agency's organization chart including the proposed program. (1 point)
- 501 (c)(3) designation letter from the IRS, if applicable. (1 point)
- Job Descriptions: Attach job descriptions of the staff that will be paid with the OARR Title III funding. (1 point)
- Board of Directors roster (1 point)
- Insurance certification information including general liability, private vehicle insurance, project vehicle insurance, worker's compensation insurance. (1 point)
- Documentation of Emergency plan that can be activated in an emergency. (1 point)
- Submit the agency's written grievance process for reviewing and attempting to resolve complaints of older individuals. (1 point)
- Transition Plan for the termination and/or transfer of services as required as part of the bidding application process. (1 point)
- Plan for additional and/or decreased funding, including:
 - (1) Describe how additional funds would be used if additional funds become available. (.5 points)
 - (2) Describe how services would be reduced due to a reduction of funds. (.5 points)

The recommendation to the Sourcewise Board of Directors for award is based on the highest overall score out of 100 points.

SECTION X. 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 Raul Corral, rcorral@mysourcewise.com no later than Wednesday, January 25, 2023 at 4 p.m. 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, or any part of any proposal, to postpone the proposal deadline date, to make an award in its own best interest, to award more than one grant, to amend the RFP and to change the amount of the grant award.

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 miles cents 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. Reference the applicable fiscal year Equipment Purchasing Policy and approval process. The purchasing approval threshold is \$5,000 per unit. Note all computing devices regardless of the per unit price requires Sourcewise and State approval prior to purchasing. 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.