

SOURCEWISE INVITATION FOR BID & REQUEST FOR PROPOSAL 2024-2025 PROCEDURE

TITLE III C-2 HOME DELIVERED MEALS: MEALS VENDOR SERVICE

The Sourcewise Invitation for Bid & Request for Proposal Procedure (IFB/RFP Procedure) provides detailed program requirements including instruction 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 Title III C-2 Home Delivered Meals service on the Sourcewise website at <https://www.mysourcewise.com/about/grantees/>. Interested entities should be able to successfully respond to the Title III C-2 Home Delivered Meal RFP application submission requirements outlined in the IFB/RFP procedure.

For the 2024-2025 fiscal year starting on July 1, 2024 through June 30, 2025, Sourcewise invites the submission of proposals to secure a contract with a qualified home delivered meals service provider to formally partner with Sourcewise to provide meal preparation, catering and meal delivery services for the county-wide Sourcewise Meals on Wheels program which provided more than 428,882 frozen meals to more than 1,433 unduplicated older adults 60 and older between July 1, 2023 through March 31, 2024 in Santa Clara County.

All interested applicants which 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. 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. Private individuals are not eligible to apply for this grant.

Applicable service component for the Sourcewise Title III C-2 Home Delivered Meals RFP for contract starting on July 1, 2024 - June 30, 2025 includes the following expectations at minimum for the awarded bidder.

- Administer the home delivered meal preparation & delivery services directly as the awarded contractor or secure a formal agreement with a meal preparation & delivery service vendor to provide service. Vendors/subcontracts must be qualified to provide the service purchased and to operate in compliance with program requirements and all vendors/subcontracts must be pre-approved by Sourcewise. Signed letters of agreement to participate must accompany the proposal.
- Receive and safely store weekly deliveries of food supplies.
- Manage and administer operations for the delivery of meals to homebound older adults.
- Assemble meals (if necessary); deliver meals to eligible older adults using the applicant's delivery vehicles and temperature-controlled food carriers.
- Curate and provide co-branded (with Sourcewise logo) nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of MOW participants at least 4 times in a fiscal year and approved by the AAA Registered Dietician within the first 30 days after the contract start date.¹
- Reconcile monthly invoices for home delivered meals services with Sourcewise Meals on Wheels program to ensure accuracy of service unit entry monthly.
- Meet all the administrative requirements of the Title III C-2 Home Delivered Meals Program. Tasks include collecting, accounting, and reporting of donations in a confidential manner and consistent with standard accounting principles.
- Adhere to the Meal Specifications; Meal Menu Requirements; Routing and Delivered Schedule; Delivery: Health standards regarding the preparation & transport of Title III C-2 Home Delivered Meals outlined in [Section VI \(ii\) A - D](#).

¹ 22 CCR § 7638.11

- Define specific measurable and attainable goals and objectives to coordinate service delivery to alleviate duplication of services; obtain client input; perform outreach and promotion of the program as described in Section VI (i) of the IFB/RFP Procedure based on the sole/shared assignment identified.
- Develop and implement efficient processes set forth by the Older American Act, Title 22, CCR and adhere to Program Memos issued by the California Department of Aging.
- Provide written instructions in the language of the majority of the participants for the handling and re-heating of meals.
- Awarded Bidder shall establish a waiting list for home-delivered meals whenever meals cannot be provided to all eligible individuals and the awarded bidder must notify Sourcewise prior to establishing a waiting list or taking other measures that result in a reduction of service.

PART I. INTRODUCTION

Sourcewise is a nonprofit organization designated by the State of California Department of Aging as the Area Agency on Aging (AAA) for Santa Clara County. As the AAA, Sourcewise is responsible for planning, advocacy, coordination, and community development for senior programs and the contract administration of Older Americans Act and Older Californians Act funds allocated for seniors 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.

Sourcewise provides seniors, caregivers, and adults with disabilities, access to supportive services and resources to maintain their independence. The Sourcewise Meals on Wheels (MOW) Program brings nutrition right to your door, regardless of your economic status. Sourcewise MOW program team is partly responsible for the successful completion of following program requirements during the contract term from July 1, 2024 – June 30, 2025 not listed on Page 1 to ensure that the MOW program is administrated cooperatively with the awarded bidder.

- Sourcewise will establish eligibility and completes enrollment services related to targeting eligible older adults, including oversight to complete the initial assessment, annual in-home reassessment, and reassess eligibility for the program on a quarterly basis for all MOW participants.
- Sourcewise will provide continued support to program participants to resolve complaints, investigate food and delivery service occurrences, and any other issues to ensure the participant receives services over the phone, by email or in-person.
- Sourcewise will provide primary oversight and manage the required data collection system including registered service client level demographics and assessments in AssureCare Q Database to report to the state and coordinate service access for individual participant needs.
- Sourcewise will create promotional materials and nutrition education for participants of the program in Santa Clara County in partnership with the awarded bidder and AAA Registered Dietician in threshold languages spoken in Santa Clara County.
- Sourcewise will perform in-person and virtual outreach to increase awareness of Meals on Wheels, Area Agency on Aging supportive services, and local nutrition related support services.
- Sourcewise will oversee program operations including administrative, financial, and data reporting requirements as it relates to Sourcewise internal operations and MOW Program.

PART II. FUNDING SPECIFICATIONS

OAA Service Name: Title III C-2 Home Delivered Meals

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

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

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

Unit of Service: 1 meal = 1 unit of service

Scope of Service & Funding²

Funding available: \$ 1,036,038
The minimum grant amount is \$1,036,038

Service Standard:

Meal Type: Frozen meal and fresh food items
Units of Service: 586,500
Unduplicated Persons Served: 1,200

Required Match: The minimum cash or in-kind match is 11.11% of the requested funds.

Area to be Served, contract 1: Santa Clara County

Service Type: Registered Service

Reporting Requirements:

As a “registered service”, detailed client information for the client is required to be collected and reported by the service provider. The service provider is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The service provider must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

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

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

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

Additional data requirements and expectations are outlined in Section VII Local Sourcewise Policies.

PART III. GLOSSARY OF TERMS

AAA: Area Agency on Aging is an identifiable private nonprofit or public agency designated by the Department of Aging which works for the interest of older Californians within the PSA (Planning and Service

² Source of Funding: Federal Older American Act Title III C Nutrition Fund; California State III-C2 General Fund; California State III-C2 Nutrition Augment Funding. 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 state and federal funds.

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

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.

Family Caregiver: an adult family member, or another individual, who is an informal provider of in-home and community care to an older individual who is 60 years of age or older.

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

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

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

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

Matching Contributions: The cash and/or in-kind contribution made by the bidding organization that qualifies as match for the applicable Title III service and outlined in the program standard.

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 where requiring the client to register may serve as a barrier to receiving service.

Nutrition Services Incentive Program (NSIP): means the program whose purpose is to provide incentives to encourage and reward effective performance by AAAs in the efficient delivery of nutritious meals to older individuals. The program consists of a cash allotment based on the ratio of the number of meals served by each Planning and Service Area (PSA) compared to the total number of meals served in the State in the prior federal fiscal year.

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.

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'.

Shared Assignment: The definition used to assign shared ownership between the bidder and Sourcewise regarding required Title III C-2 Home Delivered Meal program objectives in the IFB/RFP Procedure for Title III C-2 Home Delivered Meals program.

Sole Assignment: Definition used to identify that either Sourcewise or the bidder is solely responsible for the coordination and delivery of OAA program requirements in the IFB/RFP Procedure for Title III C-2 Home Delivered Meals program.

Subcontractor: the legal entity that is identified in the bidders OAA application to carry out part of the award to meet the unit of service requirements and/or program objectives outlined in the RFP Title III C-2 Program Standard and Bidders Guide. A subcontractor is upheld to similar program/administrative requirements as outlined by in the Sourcewise contract, if awarded.

Subcontract: means any form of legal agreement between the awarded bidder/contractor and the Subcontractor, including an agreement that the Area Agency on Aging/Sourcewise considers a contract, including vendor type Agreements for providing goods or services under this Agreement.

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

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

Unduplicated Persons Count: Unique count of clients who receive services between July 1, 2024 – June 30, 2025. Bidders submitting proposals are required to include an unduplicated person count to provide services. Reporting requirements are described and nonnegotiable for registered and nonregistered Older Americans Act funded services.

Vendor: means an entity selling goods or services to the bidding agency during the bidders proposed performance of the project outlined in the RFP. A vendor is not responsible for carrying out Title III/Title VII

administrative/programmatic/matching contribution requirements which the bidding agency is primarily responsible for and is recognized as the subcontractor. The vendor is required to uphold the insurance, bonding, and security requirements which are outlined in the awarded bidding agency contract.

Voluntary Contributions: Providing clients with the opportunity to contribute monetarily to the cost of the service/program provided by the successful bidder. 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, and/or supportive services of the service (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.

IV. AAA TECHNICAL ASSISTANCE AND COORDINATION³

(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:

- (a) The AAA's assessment findings of the service providers.
- (b) 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.

³ 22 CCR 7252

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 state and 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 the assets of each community must be highlighted and used to help us 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.

Programs and/or services should not unintentionally further exacerbate inequities experienced by some communities. [View Appendix A.](#)

C. Program Assigned Responsibilities: Sourcewise will provide oversight on select program administration and operations, and the awarded bidder will be assigned responsibilities to ensure the full scope of the required program requirements are met to successfully provide services in the PSA during in the defined contract period. The responsibilities are outlined in the IFB/RFP Procedure and will be detailed in the contract agreement.

D. Required Program Match:

Bidders may be required to provide a share of the program cost. The match must directly relate to the project and expansion activities being proposed. Matching requirements are contingent based on the specific project funding source and will be identified as a requirement in the Program Standard of the Title III or Title VIII program.

Older Americans Act funding is not intended to be sole source of funding 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.

E. 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.

F. Equipment Monitoring and Availability: Submit the model numbers, cost, age, and condition of equipment that will be or has been purchased with Older Americans Act funding. Equipment purchased with OAA funding will be monitored annually. Equipment/Property with per unit cost over \$5,000 or any computing devices, regardless of cost require justification from the Contractor and approval from Area Agency and must be included in the Older Americans Act approved program budget.

- G. **Contract Period:** The contract period for the program included in this RFP is a twelve-month period from July 1, 2024 through June 30, 2025. Yearly contract renewals up to three years following the initial contract year are allowable at the discretion of the AAA subject to annual renegotiation and availability of federal, State, and local funding. The renewal contract term is from July 1 through June 30.
- 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.

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 2020, 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 OAA program requirements are defined and identify which require a collaborative working relationship between Sourcewise and the awarded contractor. 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 and coordinated prior to moving forward to the contract being signed. 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.

(i). General Older American Act Program Requirements

A. Targeting Populations

(a) Sourcewise shall perform coordinated efforts to 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 and awarded bidder shall use outreach efforts to identify individuals eligible for assistance under federal law. Priority 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, Sourcewise shall address 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.
- (4) Develop methods specific to the local community to serve the targeted group.

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

B. Coordination – Shared Assignment

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.

The bidder shall form a mutually collaborative and cooperative working relationship with Sourcewise as the Area Agency on Aging to complete this project.

C. Public Information and Outreach – Shared Assignment

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 – Shared Assignment

Bidder must demonstrate recruitment and training of all MOW staff & volunteers to support the program to meet the program specific requirements for Title III C-2 Home Delivered Meals.

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 Contribution – Shared Assignment

Bidders must provide clients with the opportunity to provide voluntary contributions confidentially to support the cost of the Title III/Title VII OAA program, including meals served, facilitation of access to such meals and provision of nutrition-related supportive services⁴. Client contributions will be managed and attributed to the program budget via proportionate percentage of responsibility.

F. Client Input – Sole Assignment

Bidders must establish a procedure for obtaining the views of the participants of the service being provided at least one time in a contract year. The procedure describing the methods for obtaining client input shall be approved by Sourcewise to measure full scope of the participants experience in the MOW program. After views are obtained from the participants of the program, both Sourcewise and the awarded bidder shall receive detailed copies of the responses in order to improve service administration.

⁴ 22 CCR § 7638.9

(ii). Title III C-2 Home Delivered Meal Service Requirements

Defined in Section VI (ii)A – D include the program specific requirements of Title III C-2 Home Delivered Meals program and describe the requirements which the awarded applicant shall adopt and apply to the administration of the OAA Senior Nutrition Program at the start of the contract term. Below awarded bidder/application is referred to as ‘contractor’ or ‘Contractor’.

A. Meal Specification Requirements:

1. Contractor shall meet the requirements of:
 - Title 22, California Code of Regulations, Division 1.8(<https://govt.westlaw.com/>)
 - California Department of Aging (<https://www.aging.ca.gov/>);
 - the California Retail Food Code (<https://www.cdph.ca.gov.pdf>);
2. **The Contractor must provide to each participating older individual of Sourcewise Meals on Wheels Program:** two meals daily for HDM recipients meeting two-thirds (2/3) of the current Dietary Reference Intake (DRI)⁵ as determined by the Food and Nutrition Board, Institute of Medicine, National Academy of Science (2006) which are incorporated by reference.
3. The Contractor shall be equipped to provide weekly the following number of meals to Sourcewise Meals on Wheels participants:
 - i. 7 Breakfast
 - ii. 7 Lunch/Dinner entrees
 - iii. Include 1- 2 seasonal food items
4. The Contractor shall provide the meal preparation & delivery services directly or the bidder shall secure a formal agreement with a meal preparation & delivery service vendor to provide service described in the RFP. The contractor and/or contracted meal preparation & delivery service vendor shall develop a policy & procedure manual that reflects Sourcewise Meals on Wheels Program requirements and the required meal components and submit to the AAA Registered Dietician for approval.

B. Sourcewise Home Delivered Meal Menu Requirements⁶:

1. The contractor shall plan menus for a minimum four (4) week cycle and maximum of sixteen (16) week cycle. Menu cycles for each type of meal will be prepared in advance and submitted to the Agency on Aging Registered Dietitian for review and approve at least fifteen (15) days prior to the beginning of the month of the menu implementation.
2. The contractor shall plan menus that comply with all Meal Specifications contained in this section and shall also implement healthy nutritional principals as established in the [Dietary Guidelines for Americans, 2020 - 2025](#). The menu requirements shall be assured by computerized nutrient analysis or use of the component pattern and approved by the AAA Registered Dietician to ensure compliance⁷.
3. Contractor will develop menus that take into consideration the food preferences of older adults. The menus shall include variations in cooking methods, texture, and color and be aesthetically appealing. The quality of the food provided must be approved by and acceptable to the Agency on Aging Registered Dietitian.
4. The Contractor will request approval from with Sourcewise prior to providing therapeutic or medically tailored meals where it is feasible, appropriate, and cost effective to meet the particular dietary needs that arise from religious or ethnic background or for the health needs of the diverse community of Santa Clara County older adult population.
5. The contractor shall submit formal plans and budget information to Sourcewise if/when the contractor develop a menu inclusive of authentic ethnic cuisine, if able, offering a variety of meals and/or foods from different ethnic groups to participants of Title III C-2 Home Delivered Meals program⁸.

⁵ 22 CCR § 7638.5

⁶ 22 CCR § 7638.5

⁷ 22 CCR § 7638.5

⁸ 22 CCR § 7638.3

6. Contractor, when possible, shall arrange to furnish holiday meal cruising to home delivered meal participants.
7. As required the contractor shall arrange to furnish modified food textures and consistency to assist the older adults, including OAA defined vulnerable populations with chewing and swallowing problems. This may include chopping, grinding, pureeing, or blending foods. The provisions of such foods should be planned with the AAA/Sourcewise Registered Dietician.
8. The contractor shall submit any and all changes or substitutions to previously approved menus must be submitted in writing to the AAA/Sourcewise Registered Dietitian for approval in advance of their use and provided to Sourcewise within 24 hours or less of first delivery and in the event of an emergency substitution notification by phone and followed by written confirmation is required.
9. The Contractor shall be willing to implement any changes in menus requested by the Area Agency on Aging to assure compliance with federal and state program regulations as required.

C. Routing and Delivered Schedule Requirements:

1. The routing and delivery schedules for all meals will be completed preferably Monday through Friday between the hours of 8:00AM and 5:00PM. When a holiday falls on a regular delivery day, tangible notification (e.g. flyer or postcard) of delivery change will be provided to the participant ahead of time. All meals are to be delivered within a one-hour window (1/2 hour before or 1/2 hour after) of the scheduled delivery time. The Sourcewise Meals on Wheels Nutrition Coordinators oversee the scheduling of home delivered meals and take into consideration meal additions, meal deletions, and requests to pause meal deliveries daily.
2. Based on the existing delivery standards of the Sourcewise Meals on Wheels program, the contractor will adopt and is responsible to modify the delivery schedules to accommodate the following occurrences.
 - a. Meals may not be delivered if no one is home to accept them.
 - b. A process for non-delivery of meals shall be developed to notify the participant. For example, if a senior is not home during the delivery, HDM driver shall leave a tag on the door indicating the time/date of the attempted delivery and a request to contact Sourcewise. The non-delivery shall be communicated with the Sourcewise Meals on Wheels program.

D. Delivery Requirements:

1. The contractor and/or subcontract and/or contracted food procurement, preparation & delivery vendor is responsible to make the following information timely and available to Sourcewise:
 - i. Daily report of meals delivered and non-delivered by delivery route.
 - ii. Request for adjustments to the delivery routes up to 24 hours in advance of the delivery or later to allow for hold, cancellations, and emergency new participant additions.
 - iii. Schedule and frequency to deliver co-branded flyers, newsletters, surveys, and etc. to participants with meals as needed.
 - iv. Schedule and frequency to deliver shelf stable emergency meals to each participant without additional charge.

E. Health standards regarding the preparation & transport of Title III C-2 Home Delivered Meals Requirements:

1. Contractor must adopt the implementation and enforcement of proper food preparation, handling, and storage practices. Strict compliance with food preparation and sanitation practices shall be followed, as specified in the California Retail Food Code and California Code of Regulations, Title 22, Division 1.8 California Department of Aging⁹.

⁹ 22 CCR § 7638.5

2. Contractor must ensure the maintenance of safe and proper food storage temperatures throughout the storage, preparation, and delivery of meals. Foods that are served cold must be delivered at appropriate temperatures to ensure food safety. Cold foods must be at 40 degrees Fahrenheit or below at the time of delivery to the meal program participant, and hot foods must be at 140 degrees Fahrenheit or above at the time of delivery home-delivered meal program participants, as required by Title 22, California Code of Regulations, Division 1.8, California Department of Aging; California Retail Food Code; and the Agency on Aging Senior Meals Program Policies and Procedures manual.
3. Meals are to be transported utilizing equipment that will maintain all meals in their appropriate hot, cold or solidly frozen states throughout delivery time. Food service containers used for meal delivery shall be constructed of material that allows for maintenance of required hot and cold temperatures, ease of transport, and durability at the time of meal disbursement. The exterior of the containers shall be clean in appearance at all times. The AAA/Sourcewise Registered Dietitian shall approve the purchase and use of all food service containers.
4. Prepackaged individual frozen meals for home delivery shall be packaged in containers suitable for both conventional oven and microwave oven (“dual oven”) heating. Individually packaged hot, home delivered meals may be securely packaged in either sealable, aluminum containers or dual oven trays.
5. Any prepackaged perishable items provided, not previously labeled by the manufacturer with a “use by” date, shall identify same in bold, minimum 18-point lettering on the package. Frozen meals shall indicate a discard date printed on the label, in minimum 18-point lettering of ninety (90) days after the date produced.
6. All meal preparation facilities of the contracted meal preparation & delivery service shall be inspected by the local health department. Copies of health department inspections are to be forwarded to the Agency on Aging immediately following the inspection.

VII. LOCAL SOURCEWISE REQUIREMENTS

Priorities and Preferences: Preference will be given to those bidders meeting the definition of minority provider¹⁰, specifically those applying for service provision to geographic areas with high concentrations of low-income minority elders and underserved/vulnerable populations in Santa Clara County.

Single Agency Subcontracts with Minority Provider: Where a program is offered on a countywide basis for a single agency contract, preference will be given to bidders that subcontract with minority provider for services to low- income minority persons which identify as the greatest economic need.

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

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

1. **Performance-Based Contracting:** Contract awards include a performance standard clause with a specific, negotiated per 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 weekly, monthly, and/or quarterly reports on various aspects of program activities in accordance with the Sourcewise standard format. All records of the service provider relating to the contract award must be maintained at the project site or local office and be made available for Sourcewise review as outlined in the contract agreement.

¹⁰ Minority Agency: 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.

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

Registered service providers are required to submit monthly detailed fiscal reports by the 15th day of the following month for the previous month to request payment of contract services. All costs reported by the provider should be clearly identified in the financial supporting documentation, including required Sourcewise templates.

3. **Grievance Procedure:** Upon award, the bidder is required to submit a written grievance process for reviewing and attempting to resolve complaints of older individuals receiving services funded the Older American Act, in accordance with 22 CCR § 7400 and defined by Sourcewise in the contract.
4. **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).
5. **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.
6. **Transition Plan:** A transition plan is required to identify the bidder's organization plan to: (1) transition the service delivery; and (2) terminate and/or transfer services if required. The transition plan is required as part of the bidding application process.
7. **Insurance:** Prior to commencement of any work on 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 these policies 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

8. **Bonding:** Bidders will be required to secure and maintain during the contract period a commercial fidelity bond in the penalty amount 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.
9. **Audits:** Bidders 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 accordance 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).

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

11. **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.

12. **Contractors and Sub-contractors:** Contractors may implement service agreements or subcontracts with food 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.

13. 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), Article 6 (Title III C-Elderly Nutrition Program), §7630 through §7638.13 (pages 174.21 through 174.27) of Register 2002, No. 2; 1-11- 2002;
 - California Retail Food Code (CRFC);
 - Dietary Reference Intakes (DRI) and Dietary Guidelines of Older Americans Act Nutrition Programs as determined by the United States Department of Agriculture (USDA);
 - 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 of Regulation [here](#).

For additional information related to program information reference the California Code of Regulation [here](#).

Federal Regulations relating to the Older American 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).

PART VIII: REQUEST FOR PROPOSAL GENERAL INFORMATION

I. SUBMISSION OF PROPOSAL:

The program specific requirements for eligible services included in the Request for Proposal for 2024-2025 fiscal year 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 bidder 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 inguyen@mysourcewise.com by the defined proposal due date below.

The Sourcewise Older Americans Act 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 Judy Nguyen, Vice President of Finance, Risk & Compliance at inguyen@mysourcewise.com and telephone call to (408) 350-3233 to confirm receipt of the withdrawal.

II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below by Title. The due dates are specific for each Title, please review carefully and plan accordingly. Detailed steps describing the RFP process are available on Pages 15 - 17 of this document.

Schedule for Title III C-2 Home Delivered Meal Request for Proposal¹¹

Bidders Conference	Thursday, April 11, 2024 from 10 a.m. – 11 a.m.
Letter of Intent Due	Friday, April 12, 2024 at 4 p.m.
Due date for proposals (must be received by Sourcewise)	Tuesday, May 7, 2024 at 4 p.m.
RFP Evaluation	Wednesday, May 8 – Saturday, May 18, 2024
Notification of contract award mailed & emailed	Wednesday, May 29, 2024
Deadline for appeals	Friday, June 7, 2024 at 4 p.m.
Contract negotiations and signature	Wednesday, May 29 – Monday, June 10, 2024
Services delivery start date	July 1, 2024

III. STEP BY STEP INSTRUCTIONS

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

Step 1 Bidders Conference:

Attend the Bidders conference scheduled on **Thursday, April 11, 2024 from 10 a.m. – 11 a.m.**

Join on your computer or mobile app

[Click here to join the meeting.](#)

Meeting ID: 882 6191 5785

Or call in (audio only)

+16699009128,,88261915785#,,,,*890711# US (San Jose)

+16694449171,,88261915785#,,,,*890711# US

Step 2 Letter of Intent Submission:

The Letter of Intent is required. The bidder should submit on/or before **Friday, April 12, 2024** to Sourcewise at 4:00 p.m. electronically to Judy Nguyen at jnguyen@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 Judy Nguyen at jnguyen@mysourcewise.com.

Step 3 Proposal Submission:

Complete paper & electronic proposals must be submitted to Sourcewise or they will not be considered for funding on **Tuesday, May 7, 2024 at 4 p.m.** The below submissions are required:

- **Emailed:** One (1) complete electronic proposal submitted by email to Judy Nguyen at jnguyen@mysourcewise.com.

¹¹ The timeline outlined in the IFB/RFP Procedure is subject to change and/or Sourcewise reserves the right to issue an addendum or amendments to this RFP timeline.

- **Hardcopies:** 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 5 RFP 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. 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, 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 18 - 21 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 6 Notification of Award:

A notification will be sent to both successful and unsuccessful applicants. A notice of adverse determination will be provided by the AAA 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 7 Deadline of Appeals:

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, on July 09, 2021 at 4 p.m.

Step 8 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 9 Service Begins:

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

PART 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: 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.

Targeting; Shared Assignment

Bidder must have established methods, other than use of means test, to coordinate in partnership with Sourcewise to perform outreach to provide home delivered meals services to all eligible persons aged 60 and older.

Bidder 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; Shared Assignment

Bidder must demonstrate recruitment and training of all MOW staff & volunteers to support the program to meet the program specific requirements for Title III C-2 Home Delivered Meals.

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.

Coordination: Shared Assignment

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.

The bidder shall describe efforts to form a mutually collaborative and cooperative working relationship with Sourcewise as the Area Agency on Aging to complete this project.

Public Information/Outreach; Shared Assignment

In partnership with Sourcewise 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.

Client Input; Sole Assignment

Bidders must establish a procedure for obtaining the views of the participants of the service being provided at least one time in a contract year. The procedure describing the methods for obtaining client input shall be approved by Sourcewise to measure full scope of the participants experience in the MOW program. After views are obtained from the participants of the program, both Sourcewise and the awarded bidder shall receive detailed copies of the responses in order to improve service administration.

Bidder must have an established written client grievance procedure in accordance with 22 CCR § 7400.

Client Contribution; Shared Assignment

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

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

Part B: Program Management (23 points)

I. Program Management narrative must cover the following topics:

- Experience of bidder, particularly in providing the proposed services. (5 points)
- Experience of bidder in serving older persons and caregivers particularly the target population. (5 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. (3 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. (3 points)
- Status as a minority provider. (1 point)

Part C: Budget (18 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-2 proposed request for grant funds in the program budget to administer direct services, compared to administrative and indirect costs. (4 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)
- Percentage of the bidder's match and relativity of the match directly related to the project and expansion activities being proposed. (3 points)

- Comparison of total program costs with program objectives (outlined in Part A) 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 amount of Older Americans Act funds, other sources of cash, anticipated program income, and the value of all donated services and materials.

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

III. Additional Budget Requirements:

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

- 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.
- 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 11.11 % match requirement for Title III C-2 Home Delivered Meals.

Example of Non-federal Matching Sources:

- Revenues from city, county and state sources;
 - Revenues from private organizations;
 - Individual contributions not tied to receiving service;
 - United Way revenues;
 - Revenue sharing;
 - Volunteer services, space, consultants, and any sources.
- Cash Match:** Non-federal cash received by the service provider/bidders and used to fulfill the local match requirement, as applicable. Cash Match is required for applicable OAA Title III B, C, & E programs and is outlined in the Program Specifications.
 - In-Kind Match:** Equivalent value of donated or volunteer services, supplies, etc. from non-federal third-party sources and used to fulfill the local match requirement, as applicable. In-kind Match is allowable for Title III programs which require match contribution. It may also include the value of service provider/bidders owned property utilized in the program.
 - 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.

All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.

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 awarded Older Americans Act funds are applied. Program income cannot be used to meet the local match requirement.

F. 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 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 B](#).

Part D: Supporting Documentation (9 points)

I. Include the following:

- Organizational Chart: Attach a copy of the bidder's organization chart including the proposed program (if not established yet). (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 OAA Title III or VII funds. (1 point)
- Board of Directors roster (1 point)
- Bond & Insurance certification information including fidelity bond, general liability, private vehicle insurance, project vehicle insurance, and workers' compensation insurance. (1 point)
- Documentation of Emergency plan that can be activated in an emergency. (1 point)
 - (1) The plan should include assurances that the facility is prepared and that the staff, volunteers, and participants have been trained in the emergency plan and in fire safety.
 - (2) Include the COVID-19 Agency Procedures as applicable for the contract for which the bidder is applying.
- Submit the bidder's written grievance process for reviewing and attempting to resolve complaints of older individuals. (1 point)
- Transition Plan for: (1) service delivery through the extent of the pandemic including transitioning from Tier 1 - Tier 4 (2) 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.

Part 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 Judy Nguyen, inguyen@mysourcewise.com no later than 3:00 pm on **Friday, May 3, 2024**. 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 against 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, its officials, its officers, its employees and agents harmless 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 insurance; (6) maintenance of necessary licenses, permits, and certificates; (7) recordkeeping; (8) non-discrimination; and adherence to all applicable federal, state and local laws. Exceptions will not be granted.

I. Right of Refusal

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

APPENDIX B: 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 transportation/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. 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 organized by amount, time, 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.

115 Subcontract: This category is for subcontractor costs. Service performed by a third party.

All categories must be complete. Sourcewise will allow indirect costs up to a maximum of **10%** of direct costs, excluding in-kind contributions, capital equipment and contract services.