



# OLDER AMERICANS ACT (OAA) INVITATION FOR BID/ REQUEST FOR PROPOSAL PROCEDURE TITLE III C-2 HOME DELIVERED MEALS 2025

## PART I. INTRODUCTION

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

Sourcewise's annual planning process identifies the needs of older adults and individuals with disabilities in Santa Clara County and develops Area Plan objectives to address these needs. The objectives are accomplished, in part, through the purchase of services from community-based organizations. For the fiscal year 2024-2025 starting on January 1, 2025, through June 30, 2025, Sourcewise invites the submission of proposals for the provision of the following supportive service:

- Title III C2 Home Delivered Meals

Agencies interested in submitting a Request for Proposal can find more information on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>.

The Request for Proposal Program Standard provides detailed instruction to support agencies through proposal development and submission process.

## Older Americans Act Contract:

Activities funded under this request for proposal should support the goals of the Older Americans Act to reflect changes in the needs of the aging population to fund community-based service programs that address the evolving needs of older adults, people with disabilities, and caregivers.



## PART II. GLOSSARY OF TERMS

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

SOURCEWISE is the designated AAA in Santa Clara County.

**ADL:** Activities of Daily Living. Indicates the person's total score on the Katz Index of Independence in Activities of Daily Living (ADL). Activities include bathing, dressing, toileting, transferring, continence, and feeding. Permissible values are 0-6.

**Adult Day Care:** Services or activities provided to adults who require care and supervision in a protective setting for a portion of a 24-hour day. Includes out of home supervision, health care, recreation, and/or independent living skills training offered in centers most commonly known as Adult Day, Adult Day Health, Senior Centers, and Disability Day Programs.

**Audience Size:** For non-registered services for which an unduplicated count of participants may not be feasible, reporting an audience size is acceptable instead.

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

**CDA:** California Department of Aging

**Case Management:** Assistance either in the form of access coordination in circumstances where the older person is experiencing diminished functioning capacities, personal conditions or other characteristics which require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing, and coordinating services among providers, and providing follow-up and reassessment, as required.

**Congregate Meals:** A meal provided to an eligible individual in a congregate group setting, that meets all the requirements of the Older Americans Act and State/Local laws and assures a minimum one-third of the Dietary Reference Intake and shall comply with Dietary Guidelines for Americans.

**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.

**Elder Abuse Prevention, Education, and Training:** Public education and training of professionals to develop, strengthen, and carry out programs for the prevention, detection, assessment, and

treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation). This includes training for Title III E caregivers.

Elder Abuse Prevention, Educational Materials: Educational materials and guidance kits distributed for the prevention, detection, assessment, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).

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 that provides a broad spectrum of senior services.

FCSP: Family Caregiver Support Program, same as Title III-E. The Family Caregiver Support Program (FCSP) provides grants to states and territories to fund various supports that help family and informal caregivers care for older adults in their homes for as long as possible.

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.

FCSP Caregiver Training: An FCSP service that provides family caregivers with instruction to improve knowledge and performance of specific skills relating to their caregiving roles and responsibilities. Skills may include activities related to health, nutrition, and fiscal management; providing personal care; and communicating with health care providers and other family members. Training may include the use of evidence-based programs; be conducted in-person or on-line and be provided in individual or group settings.

FCSP Caregiver Respite In-Home: An FCSP respite service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider.

FCSP Caregiver Respite Out-of-Home: An FCSP respite service provided in settings other than the caregiver/care receiver's home, including adult day care, senior center, or other non-residential setting (in the case of older relatives raising children, day camps), where an overnight stay does not occur.

FCSP Community Education on Caregiving: An FCSP public and media activity that conveys information to caregivers about available services, including in-person interactive presentations, booth/exhibits, or radio, TV, or website events. This service is not tailored to the needs of the individual. [Previously NAPIS Public Information on Caregiving]. An FCSP service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair).

FCSP Older Relative Caregiver Case Management: An FCSP service provided to a caregiver, at the direction of the caregiver by an individual who is trained and experienced in the case management skills that are required to deliver services and coordination; and to assess the needs, and to arrange, coordinate, and monitor an optimum package of services to meet the needs of the caregiver.

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.

Health Promotion Evidence-Based: Activities related to the prevention and mitigation of the effects of chronic disease (including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition.

Activities must meet ACL/AoA's definition for an evidence-based program. Activities that meet ACL/AoA's definition for an evidence-based program or are considered an "evidence-based" program by an operation division of the U.S. Department of Health and Human Services and shown to be effective an appropriate for older adults are funding through Title III-D.

Home-Delivered Meals: A meal provided to an eligible individual in their place of residence, that meets all the requirements of the Older Americans Act and State/Local laws, assures a minimum one-third of the current Dietary Reference Intake, and shall comply with Dietary Guidelines for Americans. Nutrition services provided to frail, homebound, or isolated older individuals including meals, nutrition education, and nutrition risk screening.

Legal Assistance: Legal advice, counseling and/or representation by an attorney or other person acting under the supervision of an attorney.

Long-Term Care Ombudsman: Identifies, investigates, and resolves complaints made by or on behalf of residents of long-term care (LTC) facilities that affect the residents' health, safety, welfare or rights. LTC Ombudsman program provides residents of LTC facilities with access to Ombudsman representatives who will advocate for their quality of care and quality of life.

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

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

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

- a. Black/African American: a person having origins in any of the Black racial groups of Africa.
- b. Hispanic: a person of Mexican, Puerto Rican, Cuban, central or South American, or other Spanish or Portuguese culture or origin regardless of race.
- c. Asian/Pacific Islander: a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam,

- or the United States Trust Territories of the Pacific including the Northern Marianas.
- d. American Indian/Alaskan Native: An American Indian, Eskimo, Aleut, or Native Hawaiian.

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

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

**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.

**Registered Service:** Detailed client information for the client is required to be collected and reported if when providing service. The agency is required to use Q Continuum (“Q”), Sourcewise’s database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

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

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

- Name
- Birthdate
- Zip Code
- Rural Status
- Nutrition Risk Assessment
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Veterans Status
- Ethnicity
- Poverty Status
- Living Status
- ADLs / IADLs Assessment

**Restricted Service:** A service provided using OAA funds in whole or in part for which demographic and consumer characteristics are reported in aggregate and consumer, personal identifying information (PII) is not shared or recorded at other than the provider level (e.g., legal assistance).

**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 bidder's 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 C2 Program Standards. 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 bidders/contractor and the Subcontractor, including an agreement that the Area Agency on Aging 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.

**To-Go Meals:** Meals that are picked up by clients (or client's agent) who are not comfortable dining in a congregate meal setting.

- a. C-1: To-Go meals are categorized as C-1 meals if they are consumed onsite and in-person interaction (e.g., one-on-one with program volunteer) or consumed offsite and include virtual interaction (e.g., group interaction via Zoom, FaceTime, MS Teams, etc. or one-on-one with program volunteer via telephone) during the meal.
- b. C-2: To-Go meals are categorized as C-2 meals if they are consumed offsite without in-person or virtual interaction.

**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:** Define as new person served. A client is considered new, only once within the fiscal year, when he/she first utilizes a covered service. A client, who has never been previously registered as a client for the service in the current fiscal year, may be counted as unduplicated. 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 bidder's proposed performance of the project outlined in the RFP. A vendor is not responsible for carrying out Title III/ 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 contribution.

### III. AAA TECHNICAL ASSISTANCE AND COORDINATION<sup>2</sup>

- (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 AAA. The assistance shall be based upon both of the following:
  - (1) The AAA's assessment findings of the service providers.
  - (2) Requests made by service providers.
  
- (b) In addition to (a), the AAA shall provide technical assistance to other organizations concerned with the needs of older individuals upon the request of such an organization.
  
- (c) Sourcewise shall:
  - (1) Undertake coordination activities designed to develop or enhance the development of community-based systems of care in, or serving, each community, as defined by the AAA, in the PSA. These coordination activities shall include, but not be limited to, all of the following:
    - (a) Coordination with services provided under both of the following:
      - (1) Title VI, Part A: Grants for Native Americans, commencing with 42 U.S.C. 3057b.
      - (2) Title VI, Part B: Grants for Supportive and Nutrition Services to Older Hawaiian Natives,
    - (b) Programs described in 42 U.S.C. 3013
    - (c) The coordination of access, in-home and legal assistance services, with community-based organizations established to benefit individuals with Alzheimer's disease and their families.
    - (d) Agencies that provide services related to health, social services, rehabilitation, and mental health services.
  - (2) Require the service providers with which it contracts to both:
    - (a) Coordinate services with other appropriate services available in the community.
    - (b) Ensure that no service constitutes a duplication of a service provided by other entities.
  - (3) Conduct efforts to facilitate both of the following:
    - (a) The coordination of community-based long-term care services is designed to allow individuals to stay in their homes.
    - (b) The involvement of long-term care providers in the coordination of community-based long-term care services.
    - (c) The community awareness of and involvement in addressing the needs of residents in long-term care facilities, including residential care facilities and skilled nursing facilities.

## IV. GENERAL INFORMATION FOR 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 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.

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, Title VII, and Ombudsman program.

Older Americans Act funding is not intended to be sole support for any service provided. Funding from other sources is necessary to effectively provide services. Additional points for otherwise responsive proposals will be awarded to 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 on Aging and must be included in the Older Americans Act approved program budget.

G Contract Period: The contract period for programs included in this RFP is a twelve-month period from January 1, 2025, 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.

H Multiple Contract Awards: Sourcewise reserves the right to enter into 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 my 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.

K Eligible Organizations:

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

## V. FEDERAL AND STATE PROGRAM REQUIREMENTS

The authorizing Federal and State statutes governing the RFP process and Sourcewise as an Area Agency on Aging are found in the Older Americans Act as amended in 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 below. 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 has been selected to assure that all necessary program requirements are met before the contract is 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.

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<sup>2</sup> 22 CCR 7252

## (i). General Older American Act Program Requirements

### A Targeting Populations:

(a) Bidders (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 60+ with the greatest economic need, with particular attention to low-income minority individuals. The term “greatest economic need” means the need resulting from an income level at or below the federal poverty line.

(2) Older individuals 60+ with the greatest social need, with particular attention to low-income minority individuals. The term “greatest economic need” means the need caused by non-economic factors which include:

- Physical and mental disabilities
- Language Barriers and cultural or social isolation caused by, among other things, racial and ethnic status, sexual orientation, human immunodeficiency virus (HIV) status, gender identity, or gender expression that does either of the following:
  1. Restricts the ability of an individual to perform normal daily tasks.
  2. Threatens the capacity of the individual to live independently.

(3) Older Native Americans.

(4) Caregiver as defined in Title III E, which includes older caregivers providing care and support to persons with developmental disabilities.

(b) Bidders 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 are isolated, abused, neglected and/or exploited.

(2) Who are frail and the caregivers of these individuals.

(3) Who reside in rural areas.

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

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

(6) With severe disabilities.

(7) With limited English-speaking ability.

(8) 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, bidders 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 substantial number of the targeted groups reside.

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

For the purposes of (b), outreach means to provide information and encouragement

about existing services and benefits to individuals.

- B Coordination:  
Bidders must form and administer cooperative agreements with other community agencies and organizations in order to ensure comprehensive and coordinated service delivery and to prevent duplication of services.
- C Public Information and Outreach:  
Bidders must have planned public information and outreach activities, including distribution of a brochure, to ensure the participation of those eligible older persons are of the target population.
- D Recruitment and Training:  
Bidders must demonstrate recruitment and appropriate training of staff and volunteers to support and meet the minimum program requirements of the funded services.
- E Client Contribution:  
Bidders must provide clients with the opportunity to contribute voluntarily and confidentially to the cost of the service.
- F Client Input:  
Bidders must have a procedure for obtaining the views of the participants of the service being provided.

**(ii). Health standards regarding the preparation & transport of Title III C-2 Home Delivered Meals Requirement:**

- A Bidders 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.

## VI. LOCAL STATE REQUIREMENTS

**Priorities and Preferences:** Preference will be given to those bidders meeting the definition of minority provider<sup>4</sup>, 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 Agencies:** 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 unit cost reimbursement rate and remedies if performance (quality or quantity) falls below a specified level in a specified period of time.
2. Program, Fiscal Reporting, and Record Keeping: Service providers will be required to submit monthly and/or quarterly reports on various aspects of program activities in accordance 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.

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 10<sup>th</sup> 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.

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

3. Grievance Procedure: 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 Americans 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.

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<sup>3</sup> 22 CCR § 7638.5

<sup>4</sup> 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 Islanders

7. 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.

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

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: Bidders 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: 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](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](http://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](#).

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

## PART III: REQUEST FOR PROPOSAL GENERAL INFORMATION

### I. SUBMISSION OF PROPOSAL

The program specific requirements for eligible services included in the Request for Proposal for 2025 year is available on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>.

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

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

Each proposal shall include the following four sections:

- |     |                     |     |                |
|-----|---------------------|-----|----------------|
| (A) | Program Description | (C) | Program Budget |
| (B) | Program Management  | (D) | Supporting     |

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 the award. To withdraw a proposal an authorized bidder representative must deliver a signed request of withdrawal by email to Dustin Gordon, Area Planner at [dgordon@mysourcewise.com](mailto:dgordon@mysourcewise.com) and telephone call to (408) 350-3202 to confirm receipt of the withdrawal.

## II. SCHEDULE OF PREPARING AND SUBMITTING A PROPOSAL:

The RFP schedule is listed below for all Older Americans Act Titles, please review carefully and plan accordingly. Detailed steps describing the RFP process are available in this document.

### Schedule for Title III C2 Home Delivered Meal Request for Proposal

Older Americans Act announcement, Mercury Newspaper	11/1/24-11/2/24
Notice of Funding Announcement on website	11/1/24
OAA Application & Program Standards available on website	11/1/24
Bidders Conference	11/6/24
Letter of Intent Due	11/8/24 4PM
Due date for proposals	12/2/24 at 4PM
RFP Evaluation	12/3/24-12/10/24
Evaluation Committee recommendations	12/11/24
Board of Directors approval	12/12/24
Notification of contract awards, mail & email	12/13/24
Deadline for appeals	12/20/24
Contract negotiations and signature	12/23/24-12/31/24
Services Begin	1/1/25

<sup>5</sup> 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.

## III. STEP BY STEP INSTRUCTIONS

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

Step 1 Announcement of Request for Proposal:

View all Request for Proposal (RFP) available on the Sourcewise website at <https://mysourcewise.com/support-sourcewise/grantees/>

Step 2 Bidders Conference:

Attend the Bidder's Conference scheduled on Wednesday, November 6, 2024, from 10:00 a.m. - 11:00 a.m. via Zoom teleconference.

Older Americans Act (OAA) Bidder's Conference

Time: November 6, 2024, 10:00 AM Pacific Time (US and Canada)

Join Zoom Meeting

[Click Here to Join the Meeting](#)

Meeting ID: 845 9160 0425

Passcode: 586939



One tap mobile

+16699009128,,84591600425#,,,,\*586939# US (San Jose)

+16694449171,,84591600425#,,,,\*586939# US

Step 3 Letter of Intent Submission:

The Letter of Intent is required. The bidder should submit on/or before Friday, November 8, 2024 to Sourcewise at 4:00 p.m. electronically to Dustin Gordon at [dgordon@mysourcewise.com](mailto:dgordon@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 Dustin Gordon at [dgordon@mysourcewise.com](mailto:dgordon@mysourcewise.com)

Step 4 Proposal Submission:

Complete paper & electronic proposals must be submitted to Sourcewise or they will not be considered for funding on Monday, December 2, 2024, at 4 p.m. The below submissions are required:

- Emailed: One (1) complete electronic proposal submitted by email to Dustin Gordon at [dgordon@mysourcewise.com](mailto:dgordon@mysourcewise.com)
- Hardcopies: One (1) original and three (3) hard copy 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, faxed, or e-mailed submissions are not acceptable.**

Step 5 RFP Evaluation:

The Sourcewise RFP Evaluation Committee evaluates the proposals based on the criteria outlined in the Request for Proposal and submits recommendations to the Sourcewise Board of Directors. Members of the Evaluation Committee are comprised of Advisory Council members and Governing board members. They will evaluate all proposals to determine responsiveness to this Request for Proposal. 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 17 - 20 of this document. Recommendations from the evaluation committee are based on the highest scores.

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

Step 6 RFP Recommendation:

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

Step 7 Board of Directors Approval:

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

### Step 8 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.
2. Describe the grounds for the adverse determination in sufficient detail to enable the entity to respond. Include all the following information:
  - The reason(s) for the adverse determination.
  - The evidence on which the adverse determination is based.
  - The effective date of the adverse determination.
  - The legal or contractual citation upon which the adverse determination is based.
  - A citation to, or copy of, the hearing process to be followed, including the entity's right to a hearing and the time period in which to request a hearing.
  - In addition, an AAA shall include in its final notice of adverse determination to an existing service provider or an applicant service provider a statement that all appeal procedures have been exhausted.

### Step 9 Deadline of Appeals:

Must be made in writing to the CEO of Sourcewise 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 December 2, 2024 at 4 p.m.

### Step 10 Contract Negotiations:

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

### Step 12 Service Begins:

This is the date on which funded services begin and the date for beginning program monitoring and evaluation January 1, 2025.

## PART IV: RFP SUBMISSION OF PROPOSAL GUIDANCE AND EVALUATION CRITERIA

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

### Part A: Program Description (52 points)

I. Program description narrative must cover the following topics:

- Do the services described match the description in the program standards with new innovative services that target new participants who have not been served in the nutrition programs previously? (10 points)
- Adequacy of the plan to provide services to minority groups with an emphasis on supporting underserved communities. The plan includes small-scale/grassroots community engagement and is culturally representative of the communities in greatest economic & social need proportionate to the total population served. (10 points)
- Does the program meet the minimum level of service described in the program standard based on the funding request? (5 points)
- Based on program objectives are their sufficient goals outlined to successfully meet the minimum unit of service requirement? (7 points)
- Does the bidding organization clearly describe their organizations staffing patterns and volunteer's ability to achieve the proposed objectives while providing adequate training to their staff and volunteers to serve the target population in this RFP? (9 points)
- Specific goals identified to coordinate with local community-based agencies to minimize duplication of services? (3 points)
- Does the bidding organization have an adequate plan to reach the target population and expand services? (3 points)
- Specific goal to solicit clients for feedback on the quality of service? (3 points)
- Does the bidding organization have a specific goal to provide an opportunity for clients to voluntarily contribute to the cost of service? (2 points)

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

#### Targeting

Bidder must have established methods, other than use of means testing, to provide services to the populations listed below. Programs, services, and activities must be extremely specific and explicit about the communities they are attempting to address gaps in service delivery.

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

- Age 75+
- Disabled Adults
- 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 outlined previously in this document.

#### Staffing & Volunteers

Bidder must demonstrate recruitment and training of staff & volunteers to support the program specific 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 kind of task that will be performed by volunteers.

#### Coordination

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

#### Public Information/Outreach

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

#### Client Input

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

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

#### Client Contribution

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 (30 points)

I. Program Management narrative must cover the following topics:

- Experience of bidder, in providing the proposed services more culturally representative of the communities. (8 points)
- Experience of bidder in serving the target population. (5 points)
- Adequacy of bidder's facility to accomplish the proposed program successfully. (5 points)
- Adequacy of bidder's plan to self-evaluate and monitor proposed objectives to successfully meet goals outlined. (3 points)
- Capability of bidder's plan to obtain additional funding support from private and other public sources. (2 points)
- Adequacy of bidder's procedures in place to manage the required fiscal and program data reporting. The presence of findings related to their service delivery from previous reports. (3 points)
- The bidder meets the definition of a minority provider. (4 points)

## Part C: Budget (7 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. (1 point)
- Description of cost-effective strategies, including policies and procedures of bidding agency as it relates to the total request for funds and program cost. (3 points)
- Comparison of total program costs with program objectives and units of service for geographic area to be served. Reference objectives above to allocate costs to successfully meet objectives. (3 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.

## II. ADDITIONAL BUDGET REQUIREMENTS:

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

1. Older Americans Act Funds Requested: This column reflects the actual Title III amount from Sourcewise. The total of this column must equal the amount of funding provided for the program as specified in the Program Standards section.
2. Non-Match Cash: Local cash contributions that do not qualify as matching contributions and/or is not being budgeted as matching contribution. Examples would be other, non-Sourcewise federal funding.
3. Non-Match In-Kind: The value of non-cash contributions that do not qualify as matching contributions and/or is not being budgeted as matching contributions.
4. Cash Match: Non-Federal cash received by the agency and used to fulfill the local match requirement.

Example of Non-Federal Matching Sources:

- a. Revenues from City, County, and State sources.
  - b. Revenues from private organizations.
  - c. Individual contributions are not tied to receiving service.
  - d. United Way revenues.
  - e. Revenue sharing.
5. In-Kind Match: Equivalent value of donated or volunteer services, supplies, etc. from nonfederal third-party sources and used to fulfill the local match requirement. It may also include the value of agency owned property utilized in the program.
6. Program Income: This column reflects the anticipated amount of funding or earnings to be received by the provider during the contract period from the following: client contributions for service, other individual donations rents, payments, and residuals to the program for use of facilities, interest, etc.

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

7. 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 Appendix A.

#### Part D: Supporting Documentation (11 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)
- Describe how additional funds would be used if additional funds became available. (1 point)
- Describe how services would be reduced due to a reduction of funds. (1 point)
- Submit a Letter of Recommendation from past funder on program/grant performance. (1 point)

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

### III. TERMS AND CONDITIONS

#### A. Certification

By submitting a proposal, the 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 Dustin Gordon, [dgordon@mysourcewise.com](mailto:dgordon@mysourcewise.com) no later than 4:00 pm on Monday, November 25, 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 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, 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; (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 A: PROGRAM BUDGET CATEGORY DEFINITIONS

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

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

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

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

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

- a. Equipment Justification: Required Sourcewise approval before purchase of equipment. Must complete equipment justification form. Enter a separate listing for each item on the equipment justification form and indicate whether the cost is for the item(s) price, operations, repairs, and/or maintenance. Include the value of in-kind contributions. [Sourcewise Equipment Justification Form](#)

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 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. 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 performs by a third party.

Sourcewise will allow indirect costs up to a maximum of 10% of direct costs, excluding in-kind contributions, capital equipment and subcontract services

## TITLE III C-2: HOME DELIVERED MEAL NUTRITION PROGRAM STANDARDS

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

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

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

**Service Type:** Registered Service

**Unit of Service:** 1 meal = 1 unit of service

### Scope of Service & Funding

Funding available: \$200,000

Minimum funding request: \$200,000

### Service Standard:

Meal Type: Hot or Fresh meals

Minimum Units of Service: 36,778

Minimum Unduplicated Persons Served: 166

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

For additional budgeting requirements read the Older Americans Act Invitation for Bid/Request for Proposal 2025 Procedure available on the Sourcewise website: <https://www.mysourcewise.com/about/grantees/>

**Area to be Served:** Santa Clara County

**Service Area Target Population:** Residents of Santa Clara County provide services to all persons aged 60 and over.

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

*Serving all adults in Santa Clara County*

*Since 1973*

■ 3100 De La Cruz Blvd, Suite 310  
Santa Clara, CA 95054  
P: (408) 350-3200

■ 16340 Monterey Road  
Morgan Hill, CA 95037  
P: (408) 762-7362

mysourcewise.com



## Home Delivered Meal

### Program Specific Scope of Service:

1. Meal must comply with the most recent Dietary Guidelines for Americans, including at minimum of one-third (1/3) of the in the Dietary Reference Intakes (DRIs) by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences (2006), which are incorporated by reference.
2. Provide nutrition education, nutrition counseling, and other nutrition services, as appropriate, based on the needs of meal participants.
3. Comply with the California Retail Food Code (CRFC) and the local health department regarding safe and sanitary preparation and service of meals.
4. Comply with the Division of Occupational Safety and Health (Cal/OSHA), California Department of Industrial Relations requirements regarding staff and participant safety.
5. At a minimum, perform quarterly monitoring for safe food handling and sanitation practices of food facilities.
6. Have a manager on staff to conduct the day-to-day management and administrative functions of the program, and have one of the following:
  - a. An associate degree in institutional food service management, plus 2 years of experience as a food service supervisor, or,
  - b. Demonstrate experience in food service, and within 12 months of hire successfully complete a minimum of 20 hours specifically related to food service management, business administration, or personnel management, or,
  - c. Two years' experience managing food services.
7. All staff, paid and volunteer, shall receive a minimum of 4 annual hours of training to perform their assigned responsibilities, including at a minimum:
  - a. Food safety, prevention of foodborne illness, and HACCP principles.
  - b. Accident prevention, instruction on fire safety, first aid, choking, earthquake preparedness, and other emergency procedures.
8. Each home-delivered meal provider shall:
  - a. Develop and implement criteria to assess the level of need for home-delivered nutrition services of each eligible participant.
    - i. Initial determination of eligibility may be done by phone
    - ii. Complete a written assessment 2 weeks prior to the start of meal services and shall include an assessment of the type of meals appropriate for the participant in their home environment.
    - iii. Reassessment of need shall be determined quarterly. Such reassessment shall be done in the home of the participant at least every other quarter. Two times a year.
  - b. Provide instructions in the language of the majority of the participants for handling and re-heating the meals.
  - c. The provider will develop a waiting list for home-delivered meals whenever the home delivered meals provider is unable to provide meals to eligible individuals. The decision to place eligible recipients of a home-delivered meal on a waiting list, and their position on such a list, shall be based on greatest need and/or in accordance with policy established by the home-delivered meal provider, in consultation with Sourcewise.

9. An eligible individual who receives a meal shall be given the opportunity to contribute to the cost of the meal. The provider shall develop a suggested contribution, considering the income ranges of older adults in the community. No eligible individual shall be denied participation because of failure or inability to contribute. In addition:
  - a. A sign indicating the suggested contribution for eligible individuals, and the fees for guests, shall be posted near the contribution container at each congregate meal site. A guest fee shall cover all meal costs.
  - b. The provider shall ensure that the amount of the eligible participants' contribution is kept confidential.
  - c. Upon award of the contract, the provider shall establish written procedure to protect contributions and fees from loss, mishandling and theft. Such procedures shall be kept on file at the provider's site.
  - d. All contributions and fees shall be identified as program income and used to increase the number of meals served, to facilitate access to such meals, and to provide nutrition-related supportive service.
10. Provide, at a minimum, 4 nutrition education sessions annually. Nutrition education is defined as demonstrations, presentations, lectures, or small group discussions. A registered dietitian shall provide input and approve the content of nutrition education prior to the presentation. Upon award the requirements on administering the training will be included.
11. The program encourages the use of volunteers. Volunteers shall be recruited and used in any phase of program operations where qualified.
12. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.
13. **Objectives:** The provider is required to demonstrate that each of the following program's areas are successfully completed within the awarded fiscal year from January 1, 2025 – June 30, 2025. Included in the Older Americans Act Application for funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

#### Targeting

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

- Resident of Santa Clara County
- Homebound due to disability, illness, or isolation
- Unable to perform two or more activities of daily living or due to cognitive or other mental impairment, or require home assistance or supervision

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

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

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

### Staffing & Volunteers

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

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

### Coordination

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

### Public Information/Outreach

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

### Client Input

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

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

### Client Contribution

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

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

### Reporting Requirements:

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

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

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

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