County of Hawaii
Office of Management
Office of Aging

Request for Proposals

HCOA IIIBC 0709
OAA Supportive & Nutrition Services

February 27, 2009

Note: If this RFP was downloaded from the State Procurement Office RFP Website each applicant must provide contact information to the RFP contact person for this RFP to be notified of any changes. For your convenience, you may download the RFP Interest form, complete and e-mail or mail to the RFP contact person. The State shall not be responsible for any missing addenda, attachments or other information regarding the RFP if a proposal is submitted from an incomplete RFP.

February 27, 2009

REQUEST FOR PROPOSALS

OLDER AMERICANS ACT SUPPORTIVE & NUTRITION SERVICES
RFP No. HCOA IIIBC 0709

The Hawaii County Office of Aging (HCOA) is requesting proposals from qualified applicants to provide eldercare supportive and nutrition services to help older individuals 60 years old and over remain independent in their own homes and communities. HCOA is soliciting proposals for the following eldercare supportive and nutrition services: Transportation, Outreach, Public Information, Legal Assistance, Congregate Meals, Home Delivered Meals, Nutrition Transportation, and Nutrition Education. The contract term will be from July 1, 2009 through June 30, 2010 and may be extended for up to one (1) 12-month term. Multiple contracts will be awarded under this request for proposals.

Proposals shall be mailed, postmarked by the United States Postal Service on or before April 3, 2009 and received no later than 10 days from the submittal deadline. Hand delivered proposals shall be received no later than 4:30 p.m., Hawaii Standard Time (HST), on April 3, 2009 at the drop-off sites designated on the Proposal Mail-in and Delivery Information Sheet. Proposals postmarked or hand delivered after the submittal deadline shall be considered late and rejected. There are no exceptions to this requirement.

The Hawaii County Office of Aging will conduct an orientation on March 10, 2009 from 1:30 PM to 3:00 PM HST, at the ADRC Training Room, 1055 Kinoole Street, Hilo, Hawaii, 96720-3853. All prospective applicants are encouraged to attend the orientation.

The deadline for submission of written questions is 4:30 p.m., HST, on March 13, 2009. All written questions will receive a written response from the County of Hawaii on or before March 18, 2009.

Inquiries regarding this RFP should be directed to the RFP contact person, Lito M. Asuncion at 1055 Kinoole Street, Suite 101, Hilo, Hawaii 96720, telephone: (808) 961-8600, fax: (808) 961-8603, e-mail: lito.hcoa@hawaiiantel.net.
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PROPOSAL MAIL-IN AND DELIVERY INFORMATION SHEET

NUMBER OF COPIES TO BE SUBMITTED: 1 original, 2 copies

ALL MAIL-INS SHALL BE POSTMARKED BY THE UNITED STATES POSTAL SERVICE (USPS) NO LATER THAN **April 3, 2009 and received by the state purchasing agency no later than 10 days from the submittal deadline**.

All Mail-ins

Hawaii County Office of Aging
1055 Kinoole Street, Suite 101
Hilo, HI 96720-3853

HCOA RFP COORDINATOR

Lito M. Asuncion
Phone: (808) 961-8600
Fax: (808) 961-8603
email: lito.hcoa@hawaiiantel.net

ALL HAND DELIVERIES SHALL BE ACCEPTED AT THE FOLLOWING SITES UNTIL **4:30 P.M., Hawaii Standard Time (HST), April 3, 2009.** Deliveries by private mail services such as FEDEX shall be considered hand deliveries. Hand deliveries shall not be accepted if received after 4:30 p.m., **April 3, 2009.**

Drop-off Sites

East Hawaii:
Hawai‘i County Office of Aging
1055 Kino‘ole Street, Suite 101
Hilo, Hawai‘i 96720-3853

West Hawaii:
Hawai‘i County Office of Aging
Hanama Place
75-5706 Kuakini Hwy, Suite 106
Kailua-Kona, Hawai‘i 96740

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Section 1

Administrative Overview

Section 1
Administrative Overview

Applicants are encouraged to read each section of the RFP thoroughly. While sections such as the administrative overview may appear similar among RFPs, state purchasing agencies may add additional information as applicable. It is the responsibility of the applicant to understand the requirements of *each* RFP.

I. Procurement Timetable

Note that the procurement timetable represents the County's best estimated schedule. Contract start dates may be subject to the issuance of a notice to proceed.

Activity	Scheduled Date
Public notice announcing Request for Proposals (RFP)	2/19/09
Distribution of RFP	2/27-3/28/09
RFP orientation session	3/10/09
Closing date for submission of written questions for written responses	3/13/09
State purchasing agency's response to applicants' written questions	3/18/09
Discussions with applicant prior to proposal submittal deadline (optional)	3/18-4/2/09
Proposal submittal deadline	4/3/09
Discussions with applicant after proposal submittal deadline (optional)	4/4-4/8/09
Final revised proposals (optional)	4/9/09
Proposal evaluation period	4/10-4/21/09
Provider selection	4/22/09
Notice of statement of findings and decision	4/23/09
Contract start date	7/1/09

II. Website Reference

The State Procurement Office (SPO) website is http://hawaii.gov/spo/

	For	Click
1	Procurement of Health and Human Services	"Health and Human Services, Chapter 103F, HRS…"
2	RFP website	"Health and Human Services, Ch. 103F…" and "The RFP Website" (located under Quicklinks)
3	Hawaii Administrative Rules (HAR) for Procurement of Health and Human Services	"Statutes and Rules" and "Procurement of Health and Human Services"
4	Forms	"Health and Human Services, Ch. 103F…" and "For Private Providers" and "Forms"
5	Cost Principles	"Health and Human Services, Ch. 103F…" and "For Private Providers" and "Cost Principles"
6	Standard Contract -General Conditions	"Health and Human Services, Ch. 103F…" "For Private Providers" and "Contract Template – General Conditions"
7	Protest Forms/Procedures	"Health and Human Services, Ch. 103F…" and "For Private Providers" and "Protests"

Non-SPO websites

(Please note: website addresses may change from time to time. If a link is not active, try the State of Hawaii website at http://hawaii.gov)

	For	Go to
8	Tax Clearance Forms (Department of Taxation Website)	**http://hawaii.gov/tax/** click "Forms"
9	Wages and Labor Law Compliance, Section 103-055, HRS, (Hawaii State Legislature website)	**http://capitol.hawaii.gov/** click "Bill Status and Documents" and "Browse the HRS Sections."
10	Department of Commerce and Consumer Affairs, Business Registration	**http://hawaii.gov/dcca** click "Business Registration"
11	Campaign Spending Commission	**http://hawaii.gov/campaign**

III. Authority

This RFP is issued under the provisions of the Hawaii Revised Statutes (HRS) Chapter 103F and its administrative rules. All prospective applicants are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective applicant shall constitute admission of such knowledge on the part of such prospective applicant.

IV. RFP Organization

This RFP is organized into five sections:

Section 1, Administrative Overview: Provides applicants with an overview of the procurement process.

Section 2, Service Specifications: Provides applicants with a general description of the tasks to be performed, delineates provider responsibilities, and defines deliverables (as applicable).

Section 3, Proposal Application Instructions: Describes the required format and content for the proposal application.

Section 4, Proposal Evaluation: Describes how proposals will be evaluated by the state purchasing agency.

***Section 5, Attachments*:** Provides applicants with information and forms necessary to complete the application.

V. Contracting Office

The Contracting Office is responsible for overseeing the contract(s) resulting from this RFP, including system operations, fiscal agent operations, and monitoring and assessing provider performance. The Contracting Office is:

Hawaii County Office of Aging
1055 Kinoole Street, Suite 101
Hilo, HI 96720-3853

VI. Orientation

An orientation for applicants in reference to the request for proposals will be held as follows:

Date: **March 10, 2009** **Time:** **1:30 P.M.**
Location: **1055 Kinoole St. Hilo, HI – ADRC Training Room**

Applicants are encouraged to submit written questions prior to the orientation. Impromptu questions will be permitted at the orientation and spontaneous answers provided at the state/county purchasing agency's discretion. However, answers provided at the orientation are only intended as general direction and may not represent the state purchasing agency's position. Formal official responses will be provided in writing. To ensure a written response, any oral questions should be submitted in writing following the

close of the orientation, but no later than the submittal deadline for written questions indicated in the paragraph VII. Submission of Questions.

VII. Submission of Questions

Applicants may submit questions to the RFP Contact Person identified in Section 2 of this RFP. All written questions will receive a written response from the county purchasing agency.

Deadline for submission of written questions:

Date: **March 13, 2009** **Time:** 4:30 P.M. HST

State agency responses to applicant written questions will be provided by**:**
Date: **March 16-18, 2009**

VIII. Submission of Proposals

A. **Forms/Formats -** Forms, with the exception of program specific requirements, may be found on the State Procurement Office website referred to in II. Website Reference. Refer to the Proposal Application Checklist for the location of program specific forms.

1. **Proposal Application Identification (Form SPO-H-200)**. Provides applicant proposal identification.

2. **Proposal Application Checklist**. Provides applicants with information on where to obtain the required forms; information on program specific requirements; which forms are required and the order in which all components should be assembled and submitted to the state purchasing agency.

3. **Table of Contents**. A sample table of contents for proposals is located in Section 5, Attachments. This is a sample and meant as a guide. The table of contents may vary depending on the RFP.

4. **Proposal Application (Form SPO-H-200A)**. Applicant shall submit comprehensive narratives that address all of the proposal requirements contained in Section 3 of this RFP, including a cost proposal/budget if required.

B. **Program Specific Requirements**. Program specific requirements are included in Section~~s~~ 2, Service Specifications and Section 3, Proposal Application Instructions, as applicable. If required, Federal and/or State certifications are listed on the Proposal Application Checklist located in Section 5.

C. **Multiple or Alternate Proposals**. Multiple or alternate proposals shall not be accepted unless specifically provided for in Section 2 of this RFP. In the event alternate proposals are not accepted and an applicant submits alternate proposals, but clearly indicates a primary proposal, it shall be considered for award as though it were the only proposal submitted by the applicant.

D. **Tax Clearance**. Pursuant to HRS Section 103-53, as a prerequisite to entering into contracts of $25,000 or more, providers shall be required to submit a tax clearance certificate issued by the Hawaii State Department of Taxation (DOTAX) and the Internal Revenue Service (IRS). The certificate shall have an original green certified copy stamp and shall be valid for six (6) months from the most recent approval stamp date on the certificate. Tax clearance applications may be obtained from the Department of Taxation.website. (Refer to this section's part II. Website Reference.)

E. **Wages and Labor Law Compliance**. If applicable, by submitting a proposal, the applicant certifies that the applicant is in compliance with HRS Section 103-55, Wages, hours, and working conditions of employees of contractors performing services. Refer to HRS Section 103-55, at the Hawaii State Legislature website. (See part II, Website Reference.)

- **Compliance with all Applicable State Business and Employment Laws.** All providers shall comply with all laws governing entities doing business in the State. Prior to contracting, owners of all forms of business doing business in the state except sole proprietorships, charitable organizations unincorporated associations and foreign insurance companies be registered and in good standing with the Department of Commerce and Consumer Affairs (DCCA), Business Registration Division. Foreign insurance companies must register with DCCA, Insurance Division. More information is on the DCCA website. (See part II, Website Reference.)

F. **Hawaii Compliance Express (HCE)**. Providers may register with HCE for online proof of DOTAX and IRS tax clearance Department of Labor and Industrial Relations (DLIR) labor law compliance, and DCCA good standing compliance. There is a nominal annual fee for the service. The "Certificate of Vendor Compliance" issued online through HCE provides the registered provider's current compliance status as of the issuance date, and is accepted for both contracting and final payment purposes. Refer to this section's part II. Website Reference for HCE's website address.

G. **Campaign Contributions by State and County Contractors**. Providers are hereby notified of the applicability of HRS Section 11-205.5, which states that campaign contributions are prohibited from specified State or county government contractors during the term of the contract if the contractors are paid with funds appropriated by a legislative body. For more information, FAQs are available at the Campaign Spending Commission webpage. (See part II, Website Reference.)

H. **Confidential Information**. If an applicant believes any portion of a proposal contains information that should be withheld as confidential, the applicant shall request in writing nondisclosure of designated proprietary data to be confidential and provide justification to support confidentiality. Such data shall accompany the proposal, be clearly marked, and shall be readily separable from the proposal to facilitate eventual public inspection of the non-confidential sections of the proposal.

Note that price is not considered confidential and will not be withheld.

I. **Confidentiality of Personal Information**. Act 10 relating to personal information was enacted in the 2008 special legislative session. As a result, the Attorney General's General Conditions of Form AG Form 103F, *Confidentiality of Personal Information*, has been amended to include Section 8 regarding protection of the use and disclosure of personal information administered by the agencies and given to third parties.

J. **Proposal Submittal**. All mail-ins shall be postmarked by the United States Postal System (USPS) and received by the State purchasing agency no later than the submittal deadline indicated on the attached Proposal Mail-in and Delivery Information Sheet. All hand deliveries shall be received by the State purchasing agency by the date and time designated on the Proposal Mail-In and Delivery Information Sheet. Proposals shall be rejected when:

- Postmarked after the designated date; or
- Postmarked by the designated date but not received within 10 days from the submittal deadline; or
- If hand delivered, received after the designated date and time.

The number of copies required is located on the Proposal Mail-In and Delivery Information Sheet. Deliveries by private mail services such as FEDEX shall be considered hand deliveries and shall be rejected if received after the submittal deadline. Dated USPS shipping labels are not considered postmarks. Proposals submitted by fax, e-mail, diskettes or any electronic means is not allowed and will be rejected.

IX. Discussions with Applicants

A. Prior to Submittal Deadline. Discussions may be conducted with potential applicants to promote understanding of the purchasing agency's requirements.

B. After Proposal Submittal Deadline - Discussions may be conducted with applicants whose proposals are determined to be reasonably susceptible of being selected for award, but proposals may be accepted without discussions, in accordance HAR Section 3-143-403.

X. Opening of Proposals

Upon receipt of a proposal by a state/county purchasing agency at a designated location, proposals, modifications to proposals, and withdrawals of proposals shall be date-stamped, and when possible, time-stamped. All documents so received shall be held in a secure place by the state purchasing agency and not examined for evaluation purposes until the submittal deadline.

Procurement files shall be open to public inspection after a contract has been awarded and executed by all parties.

XI. Additional Materials and Documentation

Upon request from the county purchasing agency, each applicant shall submit any additional materials and documentation reasonably required by the state purchasing agency in its evaluation of the proposals.

XII. RFP Amendments

The County reserves the right to amend this RFP at any time prior to the closing date for the final revised proposals.

XIII. Final Revised Proposals

If requested, final revised proposals shall be submitted in the manner, and by the date and time specified by the state purchasing agency. If a final revised proposal is not submitted, the previous submittal shall be construed as the applicant's best and final offer/proposal. *The applicant shall submit **only** the section(s) of the proposal that are amended, along with the Proposal Application Identification Form (SPO-H-200).* After final revised proposals are received, final evaluations will be conducted for an award.

XIV. Cancellation of Request for Proposal

The RFP may be canceled and any or all proposals may be rejected in whole or in part, when it is determined to be in the best interests of the State.

XV. Costs for Proposal Preparation

Any costs incurred by applicants in preparing or submitting a proposal are the applicants' sole responsibility.

XVI. Provider Participation in Planning

Provider participation in a county purchasing agency's efforts to plan for or to purchase health and human services prior to the county purchasing agency's release of a RFP, including the sharing of information on community needs, best practices, and providers' resources, shall not disqualify providers from submitting proposals if conducted in accordance with HAR Sections 3-142-202 and 3-142-203.

XVII. Rejection of Proposals

The County reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the problems involved and comply with the service specifications. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be rejected without further notice.

A proposal may be automatically rejected for any one or more of the following reasons:

(1) Rejection for failure to cooperate or deal in good faith. (HAR Section 3-141-201)

(2) Rejection for inadequate accounting system. (HAR Section 3-141-202)

(3) Late proposals (HAR Section 3-143-603)

(4) Inadequate response to request for proposals (HAR Section 3-143-609)

(5) Proposal not responsive (HAR Section 3-143-610(a)(1))

(6) Applicant not responsible (HAR Section 3-143-610(a)(2))

XVIII. Notice of Award

A statement of findings and decision shall be provided to all applicants by mail upon completion of the evaluation of competitive purchase of service proposals.

Any agreement arising out of this solicitation is subject to the approval of the Hawaii County Corporation Counsel as to form, and to all further approvals, including the approval of the Mayor, required by statute, regulation, rule, order or other directive.

No work is to be undertaken by the awardee prior to the contract commencement date. The County of Hawaii is not liable for any costs incurred prior to the official starting date.

XIX. Protests

Any applicant may file a protest against the awarding of the contract. The Notice of Protest form, SPO-H-801, is available on the SPO website. (See paragraph II, Website Reference.) Only the following matters may be protested:

(1) A county purchasing agency's failure to follow procedures established by Chapter 103F of the Hawaii Revised Statutes;

(2) A county purchasing agency's failure to follow any rule established by Chapter 103F of the Hawaii Revised Statutes; and

(3) A county purchasing agency's failure to follow any procedure, requirement, or evaluation criterion in a request for proposals issued by the county purchasing agency.

The Notice of Protest shall be postmarked by USPS or hand delivered to 1) the head of the state purchasing agency conducting the protested procurement and 2) the procurement officer who is conducting the procurement (as indicated below) within five working days of the postmark of the Notice of Findings and Decision sent to the protestor. Delivery services other than USPS shall be considered hand deliveries and considered submitted on the date of actual receipt by the state purchasing agency.

Head of State Purchasing Agency	**Procurement Officer**
Name: Nancy Crawford	Name: Lito M. Asuncion
Title: Director of Finance	Title: Program Planner – Office of Aging
Mailing Address: 25 Aupuni Street Hilo, HI 96720	Mailing Address: 1055 Kinoole St. Ste 101 Hilo, HI 96720-3853
Business Address: 891 Ululani Street Hilo, HI 96720	Business Address: 1055 Kinoole St. Ste 101 Hilo, HI 96720-3853

XX. Availability of Funds

The award of a contract and any allowed renewal or extension thereof, is subject to allotments made by the Director of Finance, County of Hawaii, pursuant to HRS Chapter 37, and subject to the availability of State and/or Federal funds.

XXI. General and Special Conditions of Contract

The general conditions that will be imposed contractually are on the SPO website. (See paragraph II, Website Reference). Special conditions may also be imposed contractually by the county purchasing agency, as deemed necessary.

XXII. Cost Principles

In order to promote uniform purchasing practices among state purchasing agencies procuring health and human services under HRS Chapter 103F, state purchasing agencies will utilize standard cost principles outlined in Form SPO-H-201, which is available on the SPO website (see paragraph II, Website Reference). Nothing in this section shall be construed to create an exemption from any cost principle arising under federal law.

Section 2
Service Specifications

Legal Services - 2-2 to 2-8
Outreach - 2-9 to 2-15
Transportation - 2-16 to 2-22
Public Information - 2-23 to 2-28
Congregate Meals - 2-29 to 2-35
Home Delivered Meals - 2-36 to 2-43
Nutrition Education - 2-44 to 2-48
Nutrition Transportation - 2-49 to 2-55

Note: All responders to this RFP must submit a separate proposal for each service applying for funding.

Section 2
Service Specifications
LEGAL SERVICES

I. Introduction

A. Overview, purpose or need

Legal services are needed to protect and support the autonomy and independence of the older adult population. Due to difficulty accessing quality legal services by Hawai‘i county’s older adult population, HCOA has funded a legal services program for Hawai‘i’s older adult population for over 30 years. The purpose of procuring legal services is to assure older adults have access to specialized services of an attorney which promote and secure the rights and entitlements of older persons in solving legal problems relating to law, regulation, policy or rule; and includes, to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney, and counseling or representation by a non-lawyer where permitted by law despite the older adults ability to pay for those services.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal.

C. Description of the goals of the service

The goal of the legal assistance program is to ensure older adults of their rights and benefits and to be protected from abuse, neglect and exploitation.

D. Description of the target population to be served

The target population for legal services under Title III funding includes those elders aged 60 and over with the greatest social and economic needs with an emphasis on low-income and minority elders. Providers are required to provide increased outreach and access to elders with limited English speaking proficiency, minority, Native American, rural elders and limited English proficient seniors as integral part of their plan, based on the population mix of the geographic area in which they intend to provide services.

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an Applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

The estimated annual amount of award for legal services is $ 73,000.00. The final, specific allocation of all Title III funds will be determined by HCOA after applications for all Title III services have been evaluated.

The funds for services will be subject to availability, need for the service, and the satisfactory evaluation of the provider's performance.

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

In responding to this Request for Proposal (RFP), the applicant shall:

Have license(s) and/or certificate(s), as applicable, in accordance with federal, state and county regulations.

If applicable, the contractor must maintain professional/general and auto liability insurance with a limit of no less than $1,000,000.00 and proof of worker compensation insurance during the term of the agreement. Provide the County with a certificate of same, naming the County additional insured.

Provide specialized services of an attorney which promote and secure the rights and entitlements of older persons in solving legal problems relating to law, regulation, policy or rule; and includes, to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney, and counseling or representation by a non-lawyer where permitted by law.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☒ Single ☐ Multiple ☐ Single & Multiple

Criteria for multiple awards: Not Applicable

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Number of possible extension: 1
Condition of Extension: Must be in writing, and must be executed prior to expiration of initial contract.
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

A. Service Activities

(Minimum and/or mandatory tasks and responsibilities)

1. Provide representation and advocacy for frail and vulnerable elderly who are victims of abuse, neglect and/or financial exploitation.

2. Provide advice and/or representation or advocacy for elderly incapacitated individuals who require legal assistance in obtaining access to appropriate medical care or heath care facilities.

3. Provide advice or representation or appropriate referrals for elderly persons with legal problems, including but not restricted to the areas of Social Security, Medicare, food stamps, consumer, housing and landlord/tenant problems, Guardianship, simple wills and medical treatment and long term care issues.

4. Assist elderly in limited estate planning, will preparation and drafting other legal documents.

5. Participate in the Case Management Project Interdisciplinary Team meetings in Hilo, Waimea, Kau and Kona.

6. Provide training and information to community service aides and other persons providing services to the elderly on various legal problems commonly encountered by the elderly.

7. Perform community outreach on legal issues by visiting residents in each island district if needed as well as community events.

8. The prospective contractor shall submit required reports including a signed invoice in order to receive payments for services rendered.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. The applicant shall provide the necessary qualified staff, equipment, vehicles and facilities that will be required in carrying out this service.

b. All personnel must be trained, screened and deemed competent by the applicant to provide the services as described in their job descriptions.

c. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and cognitively impaired individuals and people from various cultures.

d. The applicant shall have a Managing Attorney responsible for:

i. Assuring that adequate and qualified staff and volunteers are available to fulfill all their individual responsibilities to the program.
ii. Supervision of Paralegals and other staff

2. Administrative

a. The applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.

b. The applicant shall assure it has the capabilities and infrastructure to effectively and efficiently deliver the service.

c. The applicant shall have written policies and procedures on accepting, terminating and rejecting clients.

d. The applicant shall have written policies on safeguarding participant's confidential information.

e. The applicant shall provide its capacity to keep financial and program records specific to this contract.

f. The applicant shall include information in the proposal on its procedures for handling project income derived from clients' voluntary contributions.

3. Quality assurance and evaluation specifications

a. Contractors will be monitored through on-site and desktop assessments to evaluate progress toward meeting goals and to oversee compliance with government requirements and contractual agreements.

b. Client satisfaction will serve as an indicator for service effectiveness and efficiency. Program outcome measures and results will provide direction for monitoring and quality improvements. HCOA will work with the legal services provider to ensure the highest quality aid and assistance is given to older adults residing in Hawai'i County.

c. Due to the nature of legal services, client confidentially is a must. Due to this dynamic, HCOA cannot get pertinent information needed to survey individuals using this service. The successful proposal will at a

minimum, include administration of an annual survey to gauge customer satisfaction and gather data about linkages made to needed legal resources.

4. Output and performance/outcome measurements

Service Unit = 1 hour
Number of Service Unit to be provided = 2066 hours
Number of Unduplicated Participants to be served = 260

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.
Outcome Measures:

a. The % of older adults positively linked to the appropriate legal resource(s).

b. The % of older adults surveyed during the year expressing increased knowledge of entitlement programs, the legal process, and/or individual rights.

5. Experience

The preferred provider must have a minimum of two years experience in administering and providing legal services to the public, significant experience in dealing with legal issues relating to the older adult population, and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications in this solicitation.

6. Coordination of services

Establish and maintain an effective system for timely referrals of legal problems not handled by your agency to the private bar and other agencies and organizations which can offer appropriate assistance.

The applicant shall coordinate with other service providers in Hawai‘i County to accept referrals from those agencies and refer clients to appropriate programs and services that may meet the client’s additional needs.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract

C. Facilities/Equipment/Vehicles

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

IV. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose a realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made for this service. Monthly payments will be made to the provider upon receipt of a monthly invoice and progress report.

Section 2
Service Specifications
OUTREACH SERVICES

I. Introduction

A. Overview, purpose or need

Outreach is an intervention with individuals that is initiated by an agency for the specific purpose of identifying potential older clients and/or their caregivers and encouraging their use of existing services and benefits. Outreach is a critical and necessary process providers of eldercare services must undertake to assist older individuals and their caregivers in becoming familiar with benefits and services available to them in the community. Outreach can be provided in the form of door-to-door canvassing, house visits, telephone or in-person follow-up, participation in community fairs and forums, giving presentations to groups or other means that will result in identifying older individuals in the community so they could be connected to eldercare services they may need. Outreach identifies homebound or isolated people in need of services. Once older individuals and/or their caregivers are identified, they are provided with trusted and appropriate eldercare service information to assist them in making well informed decisions about what services best meet their needs.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. Review of previous utilization pattern of this service was also considered in the preparation of this solicitation.

C. Description of the goals of the service

The goal of Outreach services is for older adults and their caregivers to have ready access to information and an integrated array of health and social supports.

D. Description of the target population to be served

The target population for legal services under Title III funding includes those elders aged 60 and over with the greatest social and economic needs with an emphasis on low-income and minority elders. Providers are required to provide increased outreach and access to elders with limited English speaking proficiency, minority, Native American, and rural elders as integral part of

their plan, based on the population mix of the geographic area in which they intend to provide services.

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

The estimated amount of award for legal services is $ 32,000.00. The final, specific allocation of all Title III funds will be determined by HCOA after applications for all Title III services have been evaluated.

The funds for services will be subject to availability, need for the service, and the satisfactory evaluation of the provider's performance.

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

In responding to this Request for Proposal (RFP), the applicant shall:

Have license(s) and/or certificate(s), as applicable, in accordance with federal, state and county regulations.

If applicable, the contractor must maintain professional/general and auto liability insurance with a limit of no less than $1,000,000.00 and proof of worker compensation insurance during the term of the agreement. Provide the County with a certificate of same, naming the County additional insured.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

<u>After-the-fact secondary purchases</u> will be allowed.

<u>Planned secondary purchases</u>
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☒ Single ☐ Multiple ☐ Single & Multiple

Criteria for multiple awards: Not Applicable

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Number of possible extension: 1
Condition of Extension: Must be in writing, and must be executed prior to expiration of initial contract.
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. All outreach contacts (number and nature of contacts) must be fully documented through a manual or a computerized system approved by the Hawaii County Office of Aging (HCOA). Furthermore, all older individuals not registered in the HCOA SAMS database must be recorded on HCOA's SAMS Consumer Registration form and submitted to HCOA. In addition to identifying and registering new older individuals in the HCOA SAMS database, the prospective provider(s) shall conduct follow-up service to a list of clients provided by HCOA. Payments shall be made according to the number of completed SAMS Consumer Registration forms submitted resulting from outreach and follow-up contacts.

2. At a minimum, service providers must conduct follow-up interviews with 2000 older adults who include those identified and/or referred by Hawaii County Office of Aging and the Aging and Disability Resource Center (ADRC) and to identify at least 900 older adults annually not already registered in the HCOA data base. These 900 individuals will be issued a senior citizen ID card that can be used as a means of obtaining discounted products and services.

3. Staff of providers of outreach services must be skilled and knowledgeable about all appropriate services available in the communities to meet the needs of older individuals in Hawaii County.

4. Staff of providers of outreach services must conduct home visits on agency request/response basis to individuals needing intervention or supportive services and staff must assess client's home environment and living conditions to determine appropriate follow-up services needed.

5. Outreach services must be delivered in a culturally appropriate manner either by phone, mail, and in-person or through the internet.

6. Key personnel providing outreach services must attend and participate in HCOA ongoing training/workshops specific to data collection, reporting procedures and other areas relevant to improve the service.

7. Service providers must have a mechanism or procedure already in place to track and follow-up on the outcomes of inquiries received and referrals made.

8. Whenever possible and appropriate, older individuals requesting services and assistance must be verified first in the HCOA's SAMS database to determine whether such individuals need to be registered or not. If an older individual is not known to the SAMS database, the prospective provider may conduct a short initial intake to gather basic demographic client data essential for further follow-up or outreach to obtain detailed

client information. Only HCOA approved/certified SAMS Registration Form shall be used.

9. In order for HCOA to produce reliable expenditure reports to the State's Executive Office on Aging and to be able to compare unit cost of services among planning and service areas, prospective providers must develop and implement a system to generate and document actual costs expended in the delivery of Outreach services. If funds "other" than Title III funds are used in providing Outreach services, the proportion of "other" funds must be documented in invoices and/or expenditure reports.

10. The prospective contractor shall submit required reports including a signed invoice in order to receive payments for services rendered.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. The applicant shall provide the necessary qualified staff, equipment, vehicles and facilities that will be required in carrying out this service.

b. All personnel must be trained, screened and deemed competent by the applicant to provide the services as described in their job descriptions.

c. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and cognitively impaired individuals and people from various cultures.

2. Administrative

a. The applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.

b. The applicant shall assure it has the capabilities and infrastructure to effectively and efficiently deliver the service.

c. The applicant shall have written policies and procedures on accepting, terminating and rejecting clients.

d. The applicant shall have written policies on safeguarding participant's confidential information.

e. The applicant shall provide its capacity to keep financial and program records specific to this contract.

f. The applicant shall include information in the proposal on its procedures for handling project income derived from clients' voluntary contributions.

3. Quality assurance and evaluation specifications

a. Contractors will be monitored through on-site and desktop assessments to evaluate progress toward meeting goals and to oversee compliance with government requirements and contractual agreements.

b. Client satisfaction will serve as an indicator for service effectiveness and efficiency. Program outcome measures and results will provide direction for monitoring and quality improvements. HCOA will work with the outreach provider to ensure the highest quality assistance is given to older adults residing in Hawai'i County.

4. Output and performance/outcome measurements

Performance Outputs:
Service Unit = 1 contact
Number of Service Unit to be provided = 2900
Number of Unduplicated Participants to be served = 2900

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.

Outcome Measures:

a. The % of older adults and/or caregivers successfully linked to appropriate programs and services.

b. The % of older adults and/or caregivers surveyed during the year who report satisfaction with outreach services.

5. Experience

The preferred provider must have a minimum of two years experience in administering and providing legal services to the public, significant experience in dealing with legal issues relating to the older adult population, and possesses all the necessary management capacity and

technical expertise to effectively and efficiently meet the service specifications in this solicitation.

6. Coordination of services

The applicant shall coordinate with other service providers in Hawai‘i County to accept referrals from those agencies and refer clients to appropriate programs and services that may meet the client’s additional needs.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract

C. Facilities/Equipment/Vehicles

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

IX. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose a realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP.. Initial or advance payment shall not be made for this service. Monthly payments will be made to the provider upon receipt of a monthly invoice and progress report.

Section 2
Service Specifications
TRANSPORTATION

I. Introduction

A. Overview, purpose or need

Transportation is an essential service for older individuals who do not have other means in getting from one place to another. Transportation is needed to access many activities such as medical appointments, employment, educational activities, grocery shopping, service agency appointments, participation in the congregate nutrition programs and other rehabilitative programs. Transportation service is not a new RFP as this service is currently being provided to older individuals in Hawaii County. The selected applicant is expected to continue serving many existing participants in the new contract period without a break in service. The successful applicant will be expected to be ready to provide services as of the new contract date and provide consistent, uninterrupted service throughout the contract period. The applicant must be specific on the level of service output it proposes to provide.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal.

C. Description of the goals of the service

The goal of the transportation service is to facilitate and assure older person's access and participation in services.

D. Description of the target population to be served

Persons eligible to receive a transportation services are those who are 60 years of age or older, spouse of such a person regardless of age, and individuals with disability who reside in a low income senior housing where a congregate meal site is located.

The Older Americans Act (OAA) targeting preference is to serve older individuals who are at or below poverty, low income minorities, residing in rural areas, frail or at risk for institutionalization and older individuals who are limited English proficient.

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an Applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

Estimated annual Title III-B funding: $33,000.00 - $ 50,000.00

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

1. The applicant shall have license(s) and/or certificate(s), as applicable, in accordance with Federal, State and County regulations and shall provide copies of current applicable license(s) and certificate(s) as needed.

2. Follow all fiscal and program instructions issued by the Hawaii County Office of Aging throughout the contract year.

3. Maintain complete and current program data and fiscal records pertaining to the service contained in this RFP.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☐ Single ☐ Multiple ☒ Single & Multiple

Criteria for multiple awards:

A Single award may be made for a proposal that demonstrates the ability to provide the required expertise, resources and infrastructure to provide transportation to the target population in all geographic areas covered by this RFP.

Multiple awards may be awarded if geographical and other constraints prevent a service delivery plan from one provider.

A multiple contract may also be awarded if the county purchasing agency determines that it is in the best interest of the county for a number of providers to provide the service in this RFP considering the need, target population and geographic service area.

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Number of possible extension: 1
Condition of Extension: Must be in writing, and must be executed prior to expiration of current contract.
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. Transport individuals 60 years of age or older, from one location to another (door to door or point to point).

2. Coordinate with other organizations and agencies to meet program needs.

3. Establish and maintain a system to accept referrals and schedule transportation trips.

4. Make special travel arrangements as requested.

5. Assist individuals when entering and exiting the vehicle as needed.

6. Provider must have procedures to notify clients when services are changed, delayed or canceled.

7. Vehicles must be adequately maintained to insure passengers' safety.

8. Provider must have adequately trained personnel to provide service.

9. Key personnel providing transportation services must attend and participate in HCOA's on-going training/workshops specific to data collection, reporting procedures or other areas relevant to improving the service.

10. Priority shall be given for medically related transports.

11. All transportation clients must be registered in the HCOA approved SAMS database.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. All personnel must be trained, screened and deemed competent by the applicant to provide the services as described in their job descriptions.

b. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and

cognitively impaired individuals and people from various cultures.

c. Drivers of the vehicles must be at least 18 years of age and: a) have appropriate driver's license; b) obtain periodic physicals as required; and, c) trained to work with older individuals.

d. The Applicant shall have a qualified Director/supervisor to assume responsibility for:
   i. overall management of the transportation service including accepting referrals, coordinating drivers, scheduling trips, vehicle safety and maintenance;

   ii. meeting the OAA requirements and all other reporting requirements of this program;

   iii. ensuring the minimum transportation service standards are met, and

   iv. assuring that adequate and qualified staff and volunteers are available to fulfill all their individual responsibilities to the program.

2. Administrative

a. The applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.

b. The applicant must assure that it has the capabilities and infrastructure to effectively and safely deliver the service.

c. The applicant must have written procedures and policies on accepting, terminating and rejecting participants. All participants must be provided with termination and grievance policies during the initial enrolment of a participant.

d. The applicant must have written policies on safeguarding participant's confidential information and their consent to participate in research activities intended to improve the program.

e. If subcontractors will be used in the provision of this service, names and qualifications of subcontractors shall be included in

this proposal. The applicant shall provide its capacity to keep financial and program records specific to this contract.

f. The applicant shall include information on its procedures of handling project income derived from participants' voluntary contributions.

3. Quality assurance and evaluation specifications

a. The applicant shall describe the methods it plans to use to assure the county that the transportation service is appropriate for the needs of the target population.

b. The applicant must have a written policy to promote service quality. The applicant must present methods of measuring efficiency, effectiveness and quality of service, including evaluation by the participants. The applicant shall describe its process for making improvements or taking corrective action based upon evaluation results.

c. Periodic and/or annual monitoring by HCOA may include site visits and taking actual vehicle rides to conduct comprehensive evaluation of program and fiscal performance.

4. Output and performance/outcome measurements

Performance Outputs:
Service Unit = 1 one-way trip
Number of Service Unit to be provided = 37,000 trips
Number of Unduplicated Participants to be served = 1,000

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.

Outcome Measures:

a. The % of older individuals provided with transportation who are satisfied with the service (survey).

b. The % of transportation service recipients who attribute increased access to other services because of the service. (survey)

5. Experience

The Applicant must have a minimum of two years experience in administering and providing transportation services and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

The Applicant shall coordinate with other service providers in Hawaii County by accepting referrals from other agencies and referring participants to appropriate programs and services that may meet their other needs.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract
Annual Inventory Report	30th day after end of contract

C. Facilities/Vehicles/Computer

This service requires vehicles integral in the provision of transportation services. The applicant must have the necessary vehicles to carry out this service. Transit options for older persons with disabilities must be available. All vehicles to be used for this service must be licensed and have the level of insurance coverage required by the County/State.

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

IV. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose a realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made to successful applicant. Monthly payments shall be made upon receipt of monthly invoice and progress report.

Section 2
Service Specifications
PUBLIC EDUCATION

I. Introduction

A. Overview, purpose or need

Information and assistance (I & A) is an integral and essential component in the overall framework of serving older individuals and their caregivers in order for them to live independently for as long as possible in an environment of their choice. Under this solicitation, delivery of information and assistance services will be through the publication of a monthly newsletter targeting older individuals who are of greatest social and economic need, especially those residing in rural areas.

The publication shall provide older persons and their caregivers with information on all appropriate services available within Hawaii County communities to meet their needs; Links older persons and their caregivers to the services and opportunities that are available within Hawaii County communities; and, to the maximum extent possible, establishes adequate follow-up procedures.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. In addition, a meeting with the current provider took place to discuss cost saving measures and possible changes to the format of the newsletter.

C. Description of the goals of the service

The goal of Information and Assistance services is for older adults and their caregivers to have ready access to information and an integrated array of health and social supports.

D. Description of the target population to be served

The target population for I & A under Title III funding includes those elders aged 60 and over with the greatest social and economic needs with an emphasis on low-income and minority elders. Providers are required to provide increased outreach and access to elders with limited English speaking proficiency, minority, Native American, and rural elders as an integral part of their plan, based on the population mix of the geographic area in which they intend to provide services

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an Applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

The amount of award for I & A publication services is open. The final, specific allocation of all Title III funds will be determined by HCOA after applications for all Title III services have been evaluated.

The funds for services will be subject to availability, need for the service, and the satisfactory evaluation of the provider's performance.

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

In responding to this Request for Proposal (RFP), the applicant shall:

Have license(s) and/or certificate(s), as applicable, in accordance with federal, state and county regulations.

If applicable, the contractor must maintain professional/general and auto liability insurance with a limit of no less than $1,000,000.00 and proof of worker compensation insurance during the term of the agreement. Provide the County with a certificate of same, naming the County additional insured.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☒ Single ☐ Multiple ☐ Single & Multiple

Criteria for multiple awards: Not Applicable

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Must be in writing, and must be executed prior to expiration of initial contract.
Number of possible extension: 1
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. Proposer(s) will gather, research, select and write informative, timely and authoritative articles that promote better informed groups of older individuals. Articles may result from interviews, news service or other publications. The Hawaii County Office of Aging (HCOA) reserves the

right to review and edit contents prior to printing. Costs associated with changes required by HCOA shall be absorbed by the contractor.

2. Proposer(s) must print and distribute a minimum of 3,500 copies per publication issue for twelve (12) months. 2,000 copies shall be distributed monthly by the successful contractor to physician's offices, health care agencies, and other programs or organizations serving older individuals. As a general guideline, distribution shall be in proportion to the number of older individuals 60+ living in each District of Hawaii County. The remaining 1,500 copies shall be mailed by HCOA to older individuals and caregivers who otherwise could not obtain a copy from designated distribution/pick-up points.

3. The successful contractor shall be solely responsible in the preparation, and any associated costs of printed pages including writing, typing, proofreading, composing, page lay-out and photography.

4. The publication must have a total of (8) eight (8 ½" X 11") pages printed on 11" X 17" (folded) glossy or equivalent high grade of paper.

5. The majority of the May issue of the publication shall be dedicated to covering Older Americans Month and the annual recognition event sponsored by HCOA. A one page insert or something similar covering other pertinent news in the month of May, will be permitted.

6. The contractor is permitted to solicit for paid business ads that equal to approximately (1) one page to reduce cost of printing. All revenues from paid advertisements may be retained by contractor. The prospective contractor may encourage readers or the public to make donations to expand distribution.

7. All proof/draft copies of each issue shall be submitted to HCOA for filing and future reference.

8. The prospective contractor shall submit required reports including a signed invoice in order to receive payments for services rendered.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. The applicant shall provide the necessary qualified staff, equipment, vehicles and facilities that will be required in carrying out this service.

b. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work within the scope of this service.

2. Administrative

a. The applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.

b. The applicant shall assure it has the capabilities and infrastructure to effectively and efficiently deliver the service.

c. The applicant shall have written policies and procedures on accepting, terminating and rejecting clients.

d. The applicant shall have written policies on safeguarding participant's confidential information.

e. The applicant shall provide its capacity to keep financial and program records specific to this contract.

f. The applicant shall include information in the proposal on its procedures for handling project income derived from clients' voluntary contributions.

3. Quality assurance and evaluation specifications

a. Contractors will be monitored through on-site and desktop assessments to evaluate progress toward meeting goals and to oversee compliance with government requirements and contractual agreements.

b. Client satisfaction will serve as an indicator for service effectiveness and efficiency. Program outcome measures and results will provide direction for monitoring and quality improvements. HCOA will work with the outreach provider to ensure the highest quality assistance is given to older adults residing in Hawai'i County.

4. Output and performance/outcome measurements

Performance Outputs:

Service Unit = 1 issue of Newsletter
Number of Service Unit to be provided = 12
Number of Unduplicated Participants to be served = 4,100

Outcome Measures:

I. The % of readers surveyed during the year reporting satisfaction with the information content, quality and relevance of the Newsletter.

b. The % of readers surveyed during the year indicating the usefulness of the newsletter regarding benefits and programs available around Hawaii County.

5. Experience

The preferred provider must have a minimum of two years experience in administering and providing this kind of service to the public and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

Maintenance and expansion of business contacts within the Aging network is needed by the provider of this service. This is designed to assure stable distribution sites for the newsletter as well as to guarantee up to date information and news is communicated to older adults and their caregivers in Hawai‘i County.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract

C. Facilities/Equipment/Vehicles

Not Applicable.

IV. COMPENSATION AND METHOD OF PAYMENT

The award for this service will be a Unit Rate. Initial or advance payment shall not be made for this service. Monthly payments will be made to the provider upon receipt of a monthly invoice and progress report.

Section 2
Service Specifications
CONGREGATE MEALS

I. Introduction

A. Overview, purpose or need

The Older Americans Act (OAA) Nutrition Program is the oldest and perhaps the most well-known OAA service providing nutritious meals and socialization in congregate settings and home delivered meals to homebound frail older individuals. Historically, congregate meals have been provided to Hawaii County residents at fifteen established congregate meal sites. Many current congregate meals program participants become prospective participants in future program years hence continuity of service delivery is of utmost importance in this solicitation. Funds for the provision of congregate meals program come from Title III-C1 of the Older Americans Act of 1965 as amended. Nutritious meals, socialization and health promotion activities have been provided to approximately 1,300 older individuals annually.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. In addition, field visits of congregate meal sites were conducted to gather information that may be relevant and could contribute to the development of this RFP.

C. Description of the goals of the service

The goal of the congregate meals service is to maintain or improve the older person's nutritional status, social well-being, and ability to remain in the community. The purposes of the nutrition program are to reduce hunger and food insecurity, promotes socialization among older people and provide meals to the homebound**.**

D. Description of the target population to be served

Persons eligible to receive a congregate meal are those who are 60 years of age or older, spouse of such a person regardless of age, and individuals with disability who reside in a low income senior housing where a congregate meal site is located.

The Older Americans Act (OAA) targeting preference is to serve older individuals who are at or below poverty, low income minorities, residing in rural areas, frail or at risk for institutionalization and older individuals who are limited English proficient.

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an Applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

Estimated annual Title III-C1 funding: $170,000.00 - $ 250,000.00

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

The applicant must implement the same Nutrition Service Standards as required under Title IIIC Nutrition Programs for the Elderly of the OAA as amended. A complete copy may be requested from the Hawaii County Office of Aging if desired.

All state and local laws and regulations concerning food, food handling, food storage, food preparation, food service, equipment, supplies and food delivery must be observed.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☐ Single ☐ Multiple ☒ Single & Multiple

Criteria for multiple awards:

A Single award may be made for a proposal that demonstrates the ability to provide the required expertise, resources and infrastructure to deliver meals to the target population in all geographic areas covered by this RFP.

Multiple awards may be awarded if geographical and other constraints prevent a service delivery plan from one provider.

A multiple contract may also be awarded if the county purchasing agency determines that it is in the best interest of the county for a number of providers to provide the service in this RFP considering the need, target population and geographic service area.

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Number of possible extension: 1
Condition of Extension: Must be in writing, and must be executed prior to expiration of current contract.
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853

Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

A. Service Activities

(Minimum and/or mandatory tasks and responsibilities)

The scope of work encompasses the following tasks and responsibilities:

1. Maintain the ordering and delivering of congregate meals at fifteen (15) different meals sites designated by the HCOA. The meal sites are:
   South Hilo - Aunty Sally's Luau House, Kulaimano Housing
   North Hilo – Papaaloa Gym Annex
   Hamakua - Paauilo Gym, Honokaa Senior Center
   South Kohala - Lily Yoshimatsu Senior Center
   North Kohala - Kohala Senior Center
   North Kona - Holualoa Imin Center, Hualalai Elderly Housing
   South Kona - Hale Hookipa Elderly Housing
   Ka'u - St. Jude Episcopal Church (HOVE), Naalehu Commmunity Center, Pahala Senior Center
   Puna - Keaau Elderly Housing, Pahoa Neighborhood Center

Future expansion of meal sites must be in accordance with, and in compliance with the Hawaii county Area Plan on Aging.

2. Coordinate leisure, social, and recreational activities at each congregate meal site.
3. Provide nutrition education at each site in accordance with established nutrition education standards and procedures.
4. Determine the nutritional health status of participants using the standard tools (Nutritional Risk Assessment and Body Mass Index) provided by the HCOA at least once annually
5. In order to claim a unit for payment, all client registration must be entered on the HCOA approved client registration form.
6. Register all participants in HCOA's Social Assistance Management System (SAMS) database.
7. Planning, providing for, and monitoring all aspects of food service, including but not limited to: menu planning, nutrition standards, food preparation, food procurement, meal service procedures, safe food handling, sanitation and delivery requirements.
8. Identify and assess transportation needs of program participants and assist in providing and coordinating transportation assistance to participants.
9. Assess participants and refer them to other service agencies as needed.
10. Conduct outreach activities to attract and enlist new participants to the program.
11. Recruit and train volunteers to assist in the delivery of the nutrition program services.

12. All meals served must meet the minimum AOA standards for a meal, in compliance with the Dietary Guidelines for Americans meet 33 1/3 of the Recommended Daily Allowance (RDA) as established by the Food and Nutrition Board of National Research Council of the National Academy of Sciences. All meals must be fully documented through a computerized system approved by the HCOA.
13. Key staff providing congregate meals services must attend and participate in HCOA's ongoing training/workshops specific to data collection, reporting procedures or other areas relevant to improve the service.
14. Follow and adhere to established minimum nutrition standards developed by the Hawaii State Executive Office on Aging.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. All personnel must be trained, screened and deemed competent by the Applicant to provide the services as described in their job descriptions.
b. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and cognitively impaired individuals and people from various cultures.
c. The Applicant shall have a qualified Director to assume responsibility for:
   i. overall management of the nutrition program including production, delivery and evaluation;
   ii. meeting the OAA Nutrition Program requirements and all other reporting requirements of this program;
   iv. ensuring the minimum nutrition service standards are met, and
   v. assuring that adequate and qualified staff and volunteers are available to fulfill all their individual responsibilities to the program.
d. Supervisors of meal preparers must have at least one year experience in food management, or as a professional cook as necessary and must supervise the procurement, preparation, packaging, and delivery of safe meals.

2. Administrative

a. The Applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.
b. The applicant must assure that it has the capabilities and infrastructure to effectively and safely deliver the service.

c. The applicant must have written procedures and policies on accepting, terminating and rejecting participants. All participants must be provided with termination and grievance policies during the initial enrolment of a participant.
d. The applicant must have written policies on safeguarding participant's confidential information and their consent to participate in research activities intended to improve the program.
e. If subcontractors will be used in the provision of this service, names and qualifications of subcontractors shall be included in this proposal.
f. The Applicant shall provide its capacity to keep financial and program records specific to this contract.
g. The Applicant shall include information on its procedures of handling project income derived from participants' voluntary contributions.

3. Quality assurance and evaluation specifications

a. The Applicant shall describe the methods it plans to use to assure the county that the congregate meals service is appropriate for the needs of the targeted population.
b. The Applicant must have a written policy to promote service quality.
c. The Applicant must present methods of measuring efficiency, effectiveness and quality of service, including evaluation by the participants. The applicant shall describe its process for making improvements or taking corrective action based upon evaluation results.
d. Periodic and/or annual monitoring by HCOA may include site visits to include comprehensive evaluation of program and fiscal performance.

4. Output and performance/outcome measurements

Performance Outputs:

Service Unit = 1 meal
Number of Service Unit to be provided = 84,000 meals
Number of Unduplicated Participants to be served = 1,000

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.

Outcome Measures:

b. The % of nutrition participants whose scores on the nutritional risk assessment survey are maintained or improved.
c. The % of congregate meals participants who experience increased socialization (survey).

5. Experience

The Applicant must have a minimum of two years experience in administering and providing nutrition services and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

The Applicant shall coordinate with other service providers in Hawaii County by accepting referrals from other agencies and referring participants to appropriate programs and services that may meet their other needs. Refer participants identified as high nutritional risk for individualized professional nutrition counseling.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Quarterly NSIP Report	7th day after report quarter
Annual Narrative Report	30th day after end of contract
Annual Inventory Report	30th day after end of contract

D. Facilities

All facilities where meal preparation, cooking, packaging and delivery take place must be certified and licensed by regulatory agencies for such purpose.

Congregate meal sites shall be inspected and certified by the Department of Health and the County Building Department that such sites are safe, clean, and sanitary for serving food.

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

IV. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made to successful applicant. Monthly payments shall be made upon receipt of monthly invoice and progress report.

Section 2
Service Specifications
HOME DELIVERED MEALS

I. Introduction

A. Overview, purpose or need

The Older Americans Act (OAA) Nutrition Program is the oldest and perhaps the most well-known OAA service providing nutritious meals and socialization in congregate settings and home delivered meals to homebound frail older individuals. Historically, home delivered (commonly known as Meals on Wheels) meals have been provided to all eligible older individuals in all districts within Hawaii County. Many current home delivered meals program participants continues to be participants in ensuing program years hence continuity of service delivery is of utmost importance in this solicitation. Funds for the provision of home delivered meals program come from Title III-C2 of the Older Americans Act of 1965 as amended and the State of Hawaii's Kupuna Care Program. Home delivered meals have been provided to approximately 400 older individuals annually.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. In addition, field visits of congregate meal sites were conducted to gather information that may be relevant and could contribute to the development of this RFP.

C. Description of the goals of the service

The goal of the home delivered meals service is to maintain or improve the older person's nutritional status, social well-being, and ability to remain in the community. The purposes of the nutrition program are to reduce hunger and food insecurity, promotes socialization among older people and provide meals to the homebound**.**

D. Description of the target population to be served

Persons eligible to receive a home delivered meal are those who are 60 years of age or older who are frail, homebound by reason of illness or incapacitating disability or otherwise isolated, and the spouse of such a person even if younger.

The Older Americans Act (OAA) targeting preference is to serve older individuals who are at or below poverty, low income minorities, residing in rural areas, frail or at risk for institutionalization and older individuals who are limited English proficient.

E. Geographic coverage of service

This service intends to cover all districts within Hawaii County. If an applicant is unable to provide services for specific districts, this information must be included in its proposal.

F. Probable funding amounts, source, and period of availability

Estimated annual Title III-C2 funding: $ 75,000 - $ 87,000.00
Estimated annual Kupuna Care funding: $ 40,000 - $ 65,000.00

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

II. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

The applicant must implement the same Nutrition Service Standards as required under Title IIIC Nutrition Programs for the Elderly of the OAA as amended. A complete copy may be requested from the Hawaii County Office of Aging if desired.

The applicant shall document in the participants' folder which of the following eligibility criteria were met:

a. Lack the physical mobility and/or mental capacity necessary to shop for food, leave home for congregate meal site, or to prepare adequate meals themselves, and have no one to assist with ADL and IADL assessments.
b. Lack adequate cooking facilities and the ability to obtain the facilities needed, and are unable to attend a congregate meal site.
c. Are convalescing following discharge from hospital or facility and do not have help to prepare meals.

All state and local laws and regulations concerning food, food handling, food storage, food preparation, food service, equipment, supplies and food delivery must be observed.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☐ Single ☐ Multiple ☒ Single & Multiple

Criteria for multiple awards:

A Single award may be made for a proposal that demonstrates the ability to provide the required expertise, resources and infrastructure to deliver meals to the target population in all geographic areas covered by this RFP. Multiple awards may be awarded if geographical and other constraints prevent a service delivery plan from one provider.

A multiple contract may also be awarded if the county purchasing agency determines that it is in the best interest of the county for a number of providers to provide the service in this RFP considering the need, target population and geographic service area.

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Condition of Extension: Must be in writing, and must be executed prior to expiration of current contract.
Number of possible extension: 1
Maximum Length of Contract: 2 years

The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

III. Scope of Work

Definition: Provision of a meal to a qualified individual in his/her place of residence. The meal is served in a program administered by State Units of Aging and/or Area Agencies on Aging and meets all of the requirements of the Older Americans Act and State/Local laws. Meals provided to individuals through means-tested programs such as Medicaid Title XIX waiver meals or other programs such as state-funded means-tested programs are included in the meal total reported on line 4 of Section IIA of the NSIP reporting form. Certain Title III-E funded home delivered meals may also be included. *(Note: A qualified individual is an individual 60 years old or older who is frail, homebound by reason of illness or incapacitating disability or otherwise isolated, and the spouse of such a person even if younger).*

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. Maintain the ordering and delivering of home delivered meals throughout the geographic service area.
2. Planning, providing for and monitor all aspects of food service, including but not limited to menu planning, nutrition standards, food preparation, food procurement, food handling and sanitation requirements, and meal delivery requirements.
3. Determine the nutritional health status of participants using the standard tools (Nutritional Risk Assessment and Body Mass Index) provided by the HCOA at least once annually.
4. Screen and assess participants for program eligibility criteria and make referrals to other service agencies as needed.

5. Provide at least one nutritious meal (meeting the 33 1/3 RDA) daily, for 5 days a week. Meals may be hot and/or frozen. Frozen meals may be offered only to participants with adequate storage and can heat the food on their own.
6. Recruit and train volunteers to assist in the delivery of the nutrition program services.
7. Provide special diet meals as needed.
8. Conduct outreach activities to attract and enlist new participants to the program.
9. Recruit and train volunteers to assist in the delivery of the nutrition program services.
10. All meals served must meet the minimum Administration on Aging's standards for a meal, in compliance with the Dietary Guidelines for Americans meeting 33 1/3 of the Recommended Daily Allowance (RDA) as established by the Food and Nutrition Board of National Research Council of the National Academy of Sciences. All meals must be fully documented through a computerized system approved by the HCOA.
11. Key staff providing home delivered meals services must attend and participate in HCOA's ongoing training/workshops specific to data collection, reporting procedures or other areas relevant to improve the service.
12. In order to claim a unit for payment, all client registration must be entered on the HCOA approved client registration form.
13. Provide nutrition education for home delivered meals participants.
14. Follow and adhere to established minimum nutrition standards developed by the Hawaii State Executive Office on Aging. A copy of the nutrition standards may be obtained from HCOA if requested.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. All personnel must be trained, screened and deemed competent by the Applicant to provide the services as described in their job descriptions.
b. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and cognitively impaired individuals and people from various cultures.
c. The Applicant shall have a qualified Director to assume responsibility for:
    i. overall management of the nutrition program including production, delivery and evaluation;
    ii. meeting the OAA Nutrition Program requirements and all other reporting requirements of this program;

iii. ensuring the minimum nutrition service standards are met, and
iv. assuring that adequate and qualified staff and volunteers are available to fulfill all their individual responsibilities to the program.

c. Supervisors of meal preparers must have at least one year experience in food management, or as a professional cook as necessary and must supervise the procurement, preparation, packaging, and delivery of safe meals.

2. Administrative

a. The Applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.
b. The applicant must assure that it has the capabilities, resources and infrastructure to effectively and safely deliver the service.
c. The applicant must have written procedures and policies on accepting, terminating and rejecting participants. All participants must be provided with termination and grievance policies during the initial enrolment of a participant.
d. The applicant must have written policies on safeguarding participant's confidential information and their consent to participate in research activities intended to improve the program.
e. If subcontractors will be used in the provision of this service, names and qualifications of subcontractors shall be included in this proposal.
f. The Applicant shall provide its capacity to keep financial and program records specific to this contract.
g. The Applicant shall include information on its procedures of handling project income derived from participants' voluntary contributions.

3. Quality assurance and evaluation specifications

a. The Applicant shall describe the methods it plans to use to assure the county that the home delivered meals service is appropriate for the needs of the targeted population.
b. The Applicant must present methods of measuring efficiency, effectiveness and quality of service, including evaluation by the participants. The applicant shall describe its process for making improvements or taking corrective action based upon evaluation results.

c. The Applicant must have a written policy to promote service quality.
d. Periodic and/or annual monitoring by HCOA may include site visits to include comprehensive evaluation of program and fiscal performances.

4. Output and performance/outcome measurements

Performance Outputs:
Service Unit = 1 meal
Number of Service Unit to be provided = 42,000 meals
Number of Unduplicated Participants to be served = 350
The applicant may propose to increase performance outputs if other resources are available to provide expanded service.

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.

Outcome Measures:
The % of nutrition education participants who experience positive gains on topics/activities provided.

5. Experience

The Applicant must have a minimum of two years experience in administering and providing nutrition services and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

The Applicant shall coordinate with other service providers in Hawaii County by accepting referrals from other agencies and referring participants to appropriate programs and services that may meet their other needs. Refer participants identified as high nutritional risk for individualized professional nutrition counseling.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Quarterly NSIP Report	7th day after report quarter

Annual Narrative	30th day after end of contract
Annual Inventory Report	30th day after end of contract

C. Facilities/Equipment/Vehicles

All facilities where meal preparation, cooking, packaging and delivery take place must be certified and licensed by regulatory agencies for such purpose.

Vehicles to transport home delivered meals must be inspected and certified to be reliable, safe, clean, and sanitary this service..

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

IV. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose a realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made to successful applicant. Monthly payments shall be made upon receipt of monthly invoice and progress report.

Section 2
Service Specifications
NUTRITION EDUCATION

I. Introduction

A. Overview, purpose or need

The Older Americans Act (OAA) Nutrition Program is the oldest and perhaps the most well-known OAA service providing nutritious meals and socialization in congregate settings and home delivered meals to homebound frail older individuals. Nutrition Education is an integral component of the Nutrition Program enabling older individuals maintain or improve their nutritional status. Nutrition education is made available to participants of the congregate and home delivered meals programs, caregivers and other older adults who are not participants of the Hawaii County Nutrition Program. Funds for the provision of nutrition education come from Title III-C of the Older Americans Act of 1965 as amended.

B. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. In addition, field visits of congregate meal sites were conducted to gather information that may be relevant and could contribute to the development of this RFP.

G. Description of the goals of the service

The goal of the Nutrition Education service is improve or maintain older persons self-sufficiency and ability to remain in the community.

H. Description of the target population to be served

Persons eligible to receive nutrition education service are older individuals 60 years of age or older and caregivers. Nutrition education shall be provided to participants of the congregate and home delivered meals programs in Hawaii County.

I. Geographic coverage of service

This service intends to cover all the 15 congregate meal sites in Hawaii County and participants of the Home Delivered Meals program.

J. Probable funding amounts, source, and period of availability

Estimated annual Title III-C2 funding: up to $ 8,000.00

II. General Requirements

B. Specific qualifications or requirements, including but not limited to licensure or accreditation

The applicant must provide regularly scheduled culturally appropriate nutrition education at least monthly for each congregate dining site.

Visual and educational materials must be made available on a continuing basis at each meal site.

Nutrition information and education curriculum must be derived from evidence based knowledge and from trusted or government approved sources.

C. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

D. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

E. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☐ Single ☐ Multiple ☒ Single & Multiple

Criteria for multiple awards:

A Single award may be made for a proposal that demonstrates the ability to provide the required expertise, resources and infrastructure to deliver meals to the target population in all geographic areas covered by this RFP. Multiple awards may be awarded if geographical and other constraints prevent a service delivery plan from one provider.

A multiple contract may also be awarded if the county purchasing agency determines that it is in the best interest of the county for a number of

providers to provide the service in this RFP considering the need, target population and geographic service area.

F. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Condition of Extension: Must be in writing, and must be executed prior to expiration of current contract.
Number of possible extension: 1
Maximum Length of Contract: 2 years
The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

G. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

V. Scope of Work

Definition: The service promotes better health by providing accurate and culturally appropriate nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants or participants and caregivers in a group or individual setting overseen by a dietician or individuals of comparable expertise.

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. Plan and conduct planned classes on nutrition, health and/or physical fitness at meal sites.

2. Review presentation for appropriateness and timeliness or topics, utilization of audiovisual aids, literature, teaching tools and available resource persons.
3. Explore avenues for collaboration with other agencies for training and resource personnel and materials.
4. Use only nutrition lessons from trusted or government approved sources.
5. Document participants' attendance for every session conducted.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. All personnel must be trained, and deemed competent by the applicant to provide the service with sensitivity to the diverse ethnic, cultural and language backgrounds of the audience.

2. Administrative

The applicant must assure that it has the capabilities, resources and infrastructure to effectively and competently deliver the service.

3. Quality assurance and evaluation specifications

a. The applicant must present methods of measuring efficiency, effectiveness and quality of service, including evaluation by the participants. The applicant shall describe its process for making improvements or taking corrective action based upon evaluation results.
b. The applicant must have a written policy to promote service quality.
c. Periodic and/or annual monitoring by HCOA may include site visits to include comprehensive evaluation of program and fiscal performances.

4. **Output and performance/outcome measurements**

Performance Outputs:
Service Unit = 1 session
Number of Service Unit to be provided = 150
Number of Unduplicated Participants to be served = 1,000

Outcome Measures:
The % of nutrition education participants who experience positive gains on topics/activities provided.

5. Experience

The Applicant must have a minimum of one year experience in administering and providing nutrition education services and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

The applicant shall coordinate with the Hawaii County Nutrition Program on the design and implementation aspects of the service (timetable, location, resources needed).

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract
Annual Inventory Report	30th day after end of contract

C. Facilities/Equipment/Vehicles

Securing and arranging for equipment needed in conducting nutrition education is the responsibility of the applicant.

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

VI. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Unit Price. The applicant may propose a realistic unit rate per educational session to be provided based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made to successful applicant. Monthly payments shall be made upon receipt of monthly invoice and progress report.

Section 2
Service Specifications
NUTRITION TRANSPORTATION

I. Introduction

A. Overview, purpose or need

Transportation is an essential service for older individuals who do not have other means in getting from one place to another. This solicitation is requesting proposals from qualified agencies that will provide transportation service to participants of the congregate meal program who need the service especially in rural districts of Hawaii County. Transportation service is needed in the following congregate dining sites: Service District A includes Pahoa, Keaau, Papaaloa, Waimea, Kohala, Holualoa, Kailua-Kona; Service Area B includes Hilo, Honokaa, Kulaimano, and Oceanview. The selected applicant is expected to continue serving many existing participants in the new contract period without a break in service. The successful applicant will be expected to be ready to provide services as of the new contract date and provide consistent, uninterrupted service throughout the contract period. The applicant must be specific on the level of service output it proposes to provide and the Service District(s) it can realistically serve.

G. Planning activities conducted in preparation for this RFP

A Request for Information was issued to current and prospective providers and the community to assist the office in the preparation of this request for proposal. In addition, analysis of utilization trend on this service provided meaningful data in the preparation of this RFP.

H. Description of the goals of the service

The goal of the transportation service is to facilitate and assure older person's access and participation in the congregate meal program.

I. Description of the target population to be served

Persons eligible to receive a nutrition transportation services are those who are 60 years of age or older, spouse of such a person regardless of age, who needs transportation to in order to participate at a congregate meal site.

The Older Americans Act (OAA) targeting preference is to serve older individuals who are at or below poverty, low income minorities, residing in rural areas, frail or at risk for institutionalization and older individuals who are limited English proficient.

J. Geographic coverage of service

This service intends to cover the following Service Districts:

Service District A - Pahoa, Keaau, Paauilo, Papaaloa, Waimea, Kohala, Holualoa, Kailua-Kona, Kealakekua

Service District B - Hilo, Honokaa, Kulaimano, and Oceanview

Applicant may propose to provide transportation service to one or two service districts. If an applicant is unable to provide service to any community in any of the service districts, include this information in the proposal.

K. Probable funding amounts, source, and period of availability

Estimated annual Title IIIC funding:

Service District A = $ 150,000.00
Service District B = $ 40,000.00

HCOA reserves the right to reallocate all or part of the initial award to an agency, if there is a pattern of service underutilization, if there is a wait list for service, if an agency is not able to carry out the provision of the provider's performance, and/or if there are cuts in federal funding.

V. General Requirements

A. Specific qualifications or requirements, including but not limited to licensure or accreditation

1. The applicant shall have license(s) and/or certificate(s), as applicable, in accordance with Federal, State and County regulations and shall include copies of current applicable license(s) and certificate(s) with the proposal.

2. Follow all fiscal and program instructions issued by the Hawaii County Office of Aging throughout the contract year.

3. Maintain complete and current program data and fiscal records pertaining to the service contained in this RFP.

4. Applicant shall observe the following for priority transportation destinations:

   a) Pick up for participation at the congregate nutrition program and return home.
   b) Weekly scheduled shopping trips, from the congregate dining sites for food and personal items.
   c) Scheduled individual medical needs trips.

B. Secondary purchaser participation
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases
None.

C. Multiple or alternate proposals
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

D. Single or multiple contracts to be awarded
(Refer to HAR Section 3-143-206)

☐ Single ☐ Multiple ☒ Single & Multiple

Criteria for multiple awards:

A Single award may be made for a proposal that demonstrates the ability to provide the required expertise, resources and infrastructure to provide transportation to the target population in all geographic areas covered by this RFP.

Multiple awards may be awarded if geographical and other constraints prevent a service delivery plan from one provider.

A multiple contract may also be awarded if the county purchasing agency determines that it is in the best interest of the county for a number of providers to provide the service in this RFP considering the need, target population and geographic service area.

E. Single or multi-term contracts to be awarded
(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less) ☐ Multi-term (more than 2 years)

Contract terms:

Initial Term of Contract: 1 year July 1, 2009 to June 30, 2010
Length of extension: 12 months
Number of possible extension: 1
Condition of Extension: Must be in writing, and must be executed prior to expiration of current contract.
Maximum Length of Contract: 2 years

The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

F. RFP contact person

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Lito M. Asuncion
1055 Kinoole St. Suite 101
Hilo, Hawaii 96720-3853
Phone: (808) 961-8600
Email: lito.hcoa@hawaiiantel.net

VI. Scope of Work

A. Service Activities
(Minimum and/or mandatory tasks and responsibilities)

1. Transport Congregate Meals program participants to and from home to a congregate dining site.

2. Coordinate with other organizations and agencies to meet program needs.

3. Establish and maintain a system to accept referrals and schedule transportation trips.

4. Make special travel arrangements as requested.

5. Assist individuals when entering and exiting the vehicle as needed.

6. Provider must have procedures to notify clients when services are changed, delayed or canceled.

7. Vehicles must be adequately maintained to insure passengers' safety.

8. Provider must have adequately trained personnel to provide service.

9. Key personnel providing transportation services must attend and participate in HCOA's on-going training/workshops specific to data collection, reporting procedures or other areas relevant to improving the service.

10. All transportation clients must be registered in the HCOA approved SAMS database.

11. Pick-up congregate meals and drop-off pans as needed at various congregate dining sites. May deliver meals on wheels as needed and whenever feasible.

B. Management Requirements (Minimum and/or mandatory requirements)

1. Personnel

a. All personnel must be trained, screened and deemed competent by the Applicant to provide the services as described in their job descriptions.

b. All personnel and volunteer workers must be of good character and integrity and trained or qualified to work with physical and cognitively impaired individuals and people from various cultures.

c. Drivers of the vehicles must be at least 18 years of age and: a) have appropriate driver's license; b) obtain periodic physicals as required; and, c) trained to work with older individuals.

d. The Applicant shall have a qualified Director/supervisor to assume responsibility for:

i. overall management of the transportation service including accepting referrals, coordinating drivers, scheduling trips, vehicle safety and maintenance;

ii. meeting the OAA requirements and all other reporting requirements of this program;

iii. ensuring the minimum transportation service standards are met, and

iv. assuring that adequate and qualified staff and volunteers are available to fulfill all their individual responsibilities to the program.

2. Administrative

a. The Applicant must have administrative experience in operating a program with this scope and requirements. The applicant shall have a thorough understanding of the various levels of federal, state and county laws, rules, policies and procedures relevant to this service.

b. The applicant must assure that it has the capabilities and infrastructure to effectively and safely deliver the service.

c. The applicant must have written procedures and policies on accepting, terminating and rejecting participants. All participants must be provided with termination and grievance policies during the initial enrolment of a participant.

d. The applicant must have written policies on safeguarding participant's confidential information and their consent to participate in research activities intended to improve the program.

e. If subcontractors will be used in the provision of this service, names and qualifications of subcontractors shall be included in this proposal. The applicant shall provide its capacity to keep financial and program records specific to this contract.

f. The Applicant shall include information on its procedures of handling project income derived from participants' voluntary contributions.

3. Quality assurance and evaluation specifications

a. The applicant shall describe the methods it plans to use to assure the county that the transportation service is appropriate for the needs of the target population.

b. The applicant must have a written policy to promote service quality. The applicant must present methods of measuring efficiency, effectiveness and quality of service, including evaluation by the participants. The applicant shall describe its process for making improvements or taking corrective action based upon evaluation results.

c. Periodic and/or annual monitoring by HCOA may include site visits and taking actual vehicle rides to conduct comprehensive evaluation of program and fiscal performance.

4. Output and performance/outcome measurements

Performance Outputs:
Service Unit = 1 one-way trip
Number of Service Unit to be provided
Service District A = 17,000 trips

Service District B = 54,000 trips
Number of Unduplicated Participants to be served
Service District A = 150
Service District B = 400

In the event that the successful applicant reaches the projected units to provide before the end of the contract year, the applicant must agree to continue providing services using their own resources.

Outcome Measures:

a. The % of older individuals provided with transportation who are satisfied with the service (Client Satisfaction survey).

b. The % of transportation service recipients who attribute increased access to other services because of the service.

5. Experience

The Applicant must have a minimum of two years experience in administering and providing transportation services and possesses all the necessary management capacity and technical expertise to effectively and efficiently meet the service specifications of this solicitation.

6. Coordination of services

The Applicant shall coordinate with other service providers in Hawaii County by accepting referrals from other agencies and referring participants to appropriate programs and services that may meet their other needs.

7. Reporting requirements for program and fiscal data

Prompt submission of required reports is expected from the successful applicant. At a minimum, the successful applicant shall follow the report due dates below:

Monthly Invoice/Progress Report	7th day after report month
Annual Narrative Report	30th day after end of contract
Annual Inventory Report	30th day after end of contract

C. Facilities/Vehicles/Computer

This service requires vehicles integral in the provision of transportation services. The applicant must have the necessary vehicles to carry out this service. Transit options for older persons with disabilities must be available.

All vehicles to be used for this service must be licensed and have the level of insurance coverage required by the County/State.

The applicant must have and maintain computer hardware and software which enable the applicant to meet federal, state and county reporting requirements.

VII. COMPENSATION AND METHOD OF PAYMENT

Award for this service shall be Fixed Price. The applicant may propose a realistic performance output levels based on the funding available and taking into account the service outputs in Section III B.4 of this RFP. Initial or advance payment shall not be made to successful applicant. Monthly payments shall be made upon receipt of monthly invoice and progress report.

Section 3

Proposal Application Instructions

Section 3
Proposal Application Instructions

General instructions for completing applications:

- *Proposal Applications shall be submitted to the state purchasing agency using the prescribed format outlined in this section.*
- *The numerical outline for the application, the titles/subtitles, and the applicant organization and RFP identification information on the top right hand corner of each page should be retained. The instructions for each section however may be omitted.*
- *Page numbering of the Proposal Application should be consecutive, beginning with page one and continuing through for each section. See sample table of contents in Section 5.*
- *Proposals may be submitted in a three ring binder (Optional).*
- *Tabbing of sections (Recommended).*
- *Applicants must also include a Table of Contents with the Proposal Application. A sample format is reflected in Section 5, Attachment B of this RFP.*
- *A written response is required for **each** item unless indicated otherwise. Failure to answer any of the items will impact upon an applicant's score.*
- *Applicants are **strongly** encouraged to review evaluation criteria in Section 4, Proposal Evaluation when completing the proposal.*
- *This form (SPO-H-200A) is available on the SPO website (see Section 1, paragraph II, Website Reference). However, the form will not include items specific to each RFP. If using the website form, the applicant must include all items listed in this section.*

The Proposal Application comprises the following sections:

- *Proposal Application Identification Form*
- *Table of Contents*
- *Program Overview*
- *Experience and Capability*
- *Project Organization and Staffing*
- *Service Delivery*
- *Financial*
- *Other*

I. Program Overview

Applicant shall give a brief overview to orient evaluators as to the program/services being offered.

II. Experience and Capability

A. Necessary Skills

The applicant shall demonstrate that it has the necessary skills, abilities, and knowledge relating to the delivery of the proposed services.

B. Experience

The applicant shall provide a description of verifiable projects/contracts pertinent to the proposed services.

The applicant shall include contact information (name, address, e-mail/phone) of listed experiences. HCOA reserves the right to contact references to verify experiences.

C. Quality Assurance and Evaluation

The applicant shall describe its own plans for quality assurance and evaluation for the proposed services, including methodology.

D. Coordination of Services

The applicant shall demonstrate its capability to coordinate services with other agencies and resources in the community.

E. Facilities/Equipment

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the proposed services. If facilities are not presently available, describe plans to secure facilities. Also describe how the facilities meet ADA requirements, as applicable, and special equipment that may be required for the services.

Each applicant must address its capability to meet data collection and reporting requirements as described in the Service Specification Section of the RFP.

III. Project Organization and Staffing

A. Staffing

1. Proposed Staffing

The applicant shall describe the proposed staffing pattern, client/staff ratio and proposed caseload capacity appropriate for the viability of the

services. (Refer to the personnel requirements in the Service Specifications, as applicable.)

2. Staff Qualifications

The applicant shall provide the minimum qualifications (including experience) for staff assigned to the program. (Refer to the qualifications in the Service Specifications, as applicable)

B. Project Organization

1. Supervision and Training

The applicant shall describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.

2. Organization Chart

The applicant shall reflect the position of each staff and line of responsibility/supervision. (Include position title, name and full time equivalency) Both the "Organization-wide" and "Program" organization charts shall be attached to the Proposal Application.

IV. Service Delivery

Applicant shall include a detailed discussion of the applicant's approach to applicable service activities and management requirements from Section 2, Item III. - Scope of Work, including (if indicated) a work plan of all service activities and tasks to be completed, related work assignments/responsibilities and timelines/schedules.

The applicant shall provide detailed discussion of all service activities and management requirements included in the Service Specification Section. The applicant shall describe its approach to carry out all major services activities and tasks described in this section. The applicant must provide discussion on how it plans to use personnel/staff/volunteers described to accomplish the work scope; including the number of persons and attach the job descriptions for the personnel. The applicant must include the total number of service units it can provide, area or district of the county where the applicant can provide this service, and the estimated unit cost for the service.

V. Financial

A. Pricing Structure

Applicant shall submit a cost proposal utilizing the pricing structure designated by the state/county purchasing agency. The cost proposal shall be attached to the Proposal Application.

All budget forms, instructions and samples are located on the SPO website (see Section 1, paragraph II Websites referred to in this RFP). The following budget form(s) shall be submitted with the Proposal Application:

SPO-H-205 (See special instructions in section 5)
SPO-H206 through SPO-206-H as applicable

B. Other Financial Related Materials

1. Accounting System

In order to determine the adequacy of the applicant's accounting system as described under the administrative rules, the applicant's most recent audit is requested as part of the Proposal Application (may be attached):

VI. Other

A. Litigation

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgment. If applicable, please explain.

Section 4

Proposal Evaluation

Section 4
Proposal Evaluation

I. Introduction

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly and impartially. Structural, quantitative scoring techniques will be utilized to maximize the objectivity of the evaluation.

II. Evaluation Process

The procurement officer or an evaluation committee of designated reviewers selected by the head of the state purchasing agency or procurement officer shall review and evaluate proposals. When an evaluation committee is utilized, the committee will be comprised of individuals with experience in, knowledge of, and program responsibility for program service and financing.

The evaluation will be conducted in three phases as follows:

- Phase 1 - Evaluation of Proposal Requirements
- Phase 2 - Evaluation of Proposal Application
- Phase 3 - Recommendation for Award

Evaluation Categories and Thresholds

Evaluation Categories		Possible Points
Administrative Requirements		
Proposal Application		**100 Points**
Program Overview	0 points	
Experience and Capability	30 points	
Project Organization and Staffing	15 points	
Service Delivery	45 points	
Financial	10 Points	
TOTAL POSSIBLE POINTS		**100 Points**

III. Evaluation Criteria

A. Phase 1 - Evaluation of Proposal Requirements

1. Administrative Requirements – Application

2. Checklist Proposal Application Requirements

- Proposal Application Identification Form (Form SPO-H-200)
- Table of Contents
- Program Overview
- Experience and Capability
- Project Organization and Staffing
- Service Delivery
- Financial (All required forms and documents)
- Program Specific Requirements (as applicable)

B. Phase 2 - Evaluation of Proposal Application (100 Points)

Program Overview: No points are assigned to Program Overview. The intent is to give the applicant an opportunity to orient evaluators as to the service(s) being offered.

1. *Experience and Capability (30 Points)*

The County will evaluate the applicant's experience and capability relevant to the proposal contract, which shall include:

A. Necessary Skills	**3**
• Demonstrated skills, abilities, and knowledge relating to the delivery of the proposed services.	*2*
• Identify specific staff that possesses these skills, abilities and knowledge.	*1*
B. Program/Staff Experience	**12**
• Provide current and past experience in administering programs and contracts for older adults.	*6*
• Identify and provide employment histories and significant accomplishments for each staff member who will be involved in the management and program functions required	*6*

	to provide the service.	
C.	**Quality Assurance and Evaluation**	**4**
	• Sufficiency of quality assurance and evaluation plans for the proposed services, including methodology.	*2*
	• Written evaluation plan to effectively measure, monitor, and evaluate program performance and timely detection and resolution of identified problems.	*2*
D.	**Coordination of Services**	**9**
	• Demonstrated capability to coordinate services with other agencies and resources in the community. Provides examples how applicant network and collaborate with other providers in the community.	*9*
E.	**Facilities**	**2**
	• Adequacy of facilities relative to the proposed services.	*2*

2. ***Project Organization and Staffing (15 Points)***

The State will evaluate the applicant's overall staffing approach to the service that shall include:

A.	***Staffing***	**10**
	• Proposed Staffing: That the proposed staffing pattern, client/staff ratio, and proposed caseload capacity is reasonable to insure viability of the services.	*5*
	• Staff Qualifications: Minimum qualifications (including experience) for staff assigned to the program.	*5*

B. *Project Organization*	**5**
• Supervision and Training: Demonstrated ability to supervise, train and provide administrative direction to staff relative to the delivery of the proposed services.	*3*
• Organization Chart**:** Approach and rationale for the structure, functions, and staffing of the proposed organization for the overall service activity and tasks.	*2*

3. *Service Delivery (45 Points)*

Evaluation criteria for this section will assess the applicant's approach to the service activities and management requirements outlined in the Proposal Application.

• Demonstrates through credible research data, practical experience and evidence-based knowledge that the proposed service shall serve a significant number of the target population and such service shall fill a service gap or critical need in the community.	**10**
• Demonstrates a logical approach (including timelines) and step-by-step process that explains in detail the planning and delivery of tasks and activities to the target population. Describes in detail approaches of providing services to ethnic/linguistic minorities and the disability community. Describes in sufficient detail applicant's proposed method(s) of effectively targeting older individuals with greatest economic and social needs (poor, low income minorities, rural residence, frail or at-risk for institutionalization, limited English proficient).	**15**
• Demonstrates that the applicant proposes effective and feasible outputs/outcomes as well as the number of unduplicated consumers to be served and can be achieved with the proposed cost structure, staff and resources.	**10**
• Discusses in sufficient detail how outputs/outcomes will be tracked and documented and how applicant plans to use technology to streamline data and reporting requirements. Describes applicant's ability to provide complete, accurate and timely program and financial reports.	**10**

5. *Financial (10 Points*)

The budget fully supports the scope applicants proposal budget is reasonable, given program resources and operational capacity.

- Adequacy of accounting system.

C. Phase 3 - Recommendation for Award

Each notice of award shall contain a statement of findings and decision for the award or non-award of the contract to each applicant.

Section 5

Attachments

A. Proposal Application Checklist

B. Sample Table of Contents

C. Glossary - Definitions

Proposal Application Checklist

Applicant: _____ RFP No.: _____

The applicant's proposal must contain the following components in the order shown below. This checklist must be signed, dated and returned to the purchasing agency as part of the Proposal Application. SPOH forms ore on the SPO website. See Section 1, paragraph II Website Reference.*

Item	Reference in RFP	Format/Instructions Provided	Required by Purchasing Agency	Completed by Applicant
General:				
Proposal Application Identification Form (SPO-H-200)	Section 1, RFP	SPO Website*	**X**	
Proposal Application Checklist	Section 1, RFP	Attachment A	**X**	
Table of Contents	Section 5, RFP	Section 5, RFP	**X**	
Proposal Application (SPO-H-200A)	Section 3, RFP	SPO Website*	**X**	
Tax Clearance Certificate (Form A-6)	Section 1, RFP	Dept. of Taxation Website (Link on SPO website)*		
Cost Proposal (Budget)				
SPO-H-205	Section 3, RFP	SPO Website*		
SPO-H-205A	Section 3, RFP	SPO Website* Special Instructions are in Section 5		
SPO-H-205B	Section 3, RFP,	SPO Website* Special Instructions are in Section 5		
SPO-H-206A	Section 3, RFP	SPO Website*		
SPO-H-206B	Section 3, RFP	SPO Website*		
SPO-H-206C	Section 3, RFP	SPO Website*		
SPO-H-206D	Section 3, RFP	SPO Website*		
SPO-H-206E	Section 3, RFP	SPO Website*		
SPO-H-206F	Section 3, RFP	SPO Website*		
SPO-H-206G	Section 3, RFP	SPO Website*		
SPO-H-206H	Section 3, RFP	SPO Website*		
SPO-H-206I	Section 3, RFP	SPO Website*		
SPO-H-206J	Section 3, RFP	SPO Website*		
Certifications:				
Federal Certifications		Section 5, RFP		
Debarment & Suspension		Section 5, RFP		
Drug Free Workplace		Section 5, RFP		
Lobbying		Section 5, RFP		
Program Fraud Civil Remedies Act		Section 5, RFP		
Environmental Tobacco Smoke		Section 5, RFP		
Program Specific Requirements:				

_____ Authorized Signature

_____ Date

SPO-H (Rev. 9/08)

Organization: _____
RFP No:_____

Sample

Proposal Application
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VII. Attachments
- **A.** Cost Proposal
  SPO-H-205 Proposal Budget
  SPO-H-206A Budget Justification - Personnel: Salaries & Wages
  SPO-H-206B Budget Justification - Personnel: Payroll Taxes and Assessments, and Fringe Benefits
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GLOSSARY – TERMS AND DEFINITIONS

1. Programs, Services, and Activities

Adult Day Care/Adult Day Health: Personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, and services such as rehabilitation, medications assistance and home health aide services for adult day health. (FSRR, 2005).

Assisted Transportation: Assistance and transportation, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation. (FSRR, 2005).

Case Management: Assistance either in the form of access or care 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. (FSRR, 2005).

Chore: Assistance such as heavy housework, yard work or sidewalk maintenance for a person. (FSRR, 2005).

Congregate Meal: A meal provided to a qualified individual in a congregate or group setting. The meal as served meets all of the requirements of the OAA and State/Local laws. (FSRR, 2005).

Disease Prevention and Health Promotion Services: Health risk assessments; routine health screening, which may include hypertension, glaucoma, cholesterol, cancer, vision, hearing, diabetes, bone density, and nutrition screening; nutritional counseling and educational services for individuals and their primary caregivers; evidence-based health promotion programs, including programs 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; programs regarding physical fitness, group exercise, and music, art, and dance-movement therapy, including programs for multigenerational participation that are provided by an institution of higher education, a local educational agency, as defined in section 1471 of the Elementary and Secondary Education Act of 1965, or a community-based organization; home injury control services, including screening of high-risk home environments and provision of educational programs on injury prevention (including fall and fracture prevention) in the home environment; screening for the prevention of depression, coordination of community mental health services, provision of educational activities, and referral to psychiatric and psychological services; educational programs on the availability, benefits, and appropriate use of preventive health services covered under title XVIII of the Social Security Act; medication management screening and education to prevent incorrect medication and adverse drug reactions; information concerning diagnosis, prevention, treatment, and rehabilitation of diseases, and Alzheimer's disease and related disorders with neurological and organic brain dysfunction; gerontological counseling; and counseling regarding social services and follow-up health services based on any of the services described earlier. (OAA, Sec 102 (12)).

Education and Training Service: A supportive service designed to assist older individuals to better cope with their economic, health, and personal needs through services such as consumer education, continuing education, health education, pre-retirement education, financial planning, and other education and training services which will advance the objectives of the Older Americans Act, as amended. (OAA, Sec 302 (3)).

Home-Delivered Meal: A meal provided to a qualified individual in his/her place of residence. The meal is served in a program administered by State Units on Aging and/or Area Agencies on Aging and meets all of the requirements of the Older Americans Act and State/Local laws. (FSRR, 2005).

Homemaker: Assistance such as preparing meals, shopping for personal items, managing money, using the telephone or doing light housework. (FSRR, 2005).

Information and Assistance: A service that: a) provides individuals with information on services available within the communities; b) links individuals to the services and opportunities that are available within the communities; c) to the maximum extent practicable, establishes adequate follow-up procedures. (FSRR, 2005).

Legal Assistance: Legal advice, counseling and representation by an attorney or other person acting under the supervision of an attorney. (FSRR, 2005).

Nutrition Counseling: Individualized guidance to individuals who are at nutritional risk because of their health or nutrition history, dietary intake, chronic illnesses, or medications use, or to caregivers. Counseling is provided one-on-one by a registered dietician, and addresses the options and methods for improving nutrition status. (FSRR, 2005).

Nutrition Education: A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants, caregivers, or participants and caregivers in a group or individual setting overseen by a dietician or individual of comparable expertise. (FSRR, 2005).

Outreach: Intervention with individuals initiated by an agency or organization for the purpose of identifying potential clients (or their caregivers) and encouraging their use of existing services and benefits. (FSRR, 2005).

Personal Care: Personal assistance, stand-by assistance, supervision or cues. (FSRR, 2005).

Senior Opportunities and Services: Designed to identify and meet the needs of low-income older individuals in one or more of the following areas: (a) development and provision of new volunteer services; (b) effective referral to existing health, employment, housing, legal, consumer, transportation, and other services;
(c) stimulation and creation of additional services and programs to remedy gaps and deficiencies in presently existing services and programs; and (d) such other services as the Assistant Secretary may determine are necessary or especially appropriate to meet the needs of low-income older individuals and to assure them greater self-sufficiency. (OAA, Sec 321 (14)).

Transportation: Transportation from one location to another. Does not include any other activity. (FSRR, 2005).

2. Services to Caregivers

Information Services: A service for caregivers that provides the public and individuals with information on resources and services available to the individuals within their communities. (FSRR, 2005).

Access Assistance: A service that assists caregivers in obtaining access to the services and resources that is available within their communities. To the maximum extent practicable, it ensures that the individuals receive the services needed by establishing adequate follow-up procedures. (FSRR, 2005).

Counseling: Counseling to caregivers to assist them in making decisions and solving problems relating to their caregiver roles. This includes counseling to individuals, support groups, and caregiver training (or individual caregivers and families). (FSRR, 2005).

Respite Care: Services which offer temporary, substitute supports or living arrangements for care recipients in order to provide a brief period of relief or rest for caregivers. Respite Care includes: 1) In-home respite (personal care, homemaker, and other in-home respite); 2) respite provided by attendance of the care recipient at a senior center or other nonresidential program; 3) institutional respite provided by placing the care recipient in an institutional setting such as a nursing home for a short period of time as a respite service to the caregiver; and (for grandparents caring for children) summer camps. (FSRR, 2005).

Supplemental Services: Services provided on a limited basis to complement the care provided by caregivers.

Examples of supplemental services include, but are not limited to, home modifications, assistive technologies, emergency response systems, and incontinence supplies. (FSRR, 2005).

3. Facilities

Focal Point: A facility established to encourage the maximum collocation and coordination of services for older individuals. (OAA, Sec 102 (25)).

Multipurpose Senior Center: A community facility for the organization and provision of a broad spectrum of services, which shall include provision of health (including mental health), social, nutritional, and educational services and the provision of facilities for recreational activities for older individuals. (OAA, Sec 102 (33)).

4. Special Populations and Definitions Related to Special Populations

Adult Child with a Disability means a child who: (A) is 18 years of age or older; (B) is financially dependent on an older individual who is a parent of the child; and (C) has a disability. (OAA, Sec 102 (15)).

At Risk for Institutional Placement: With respect to an older individual, that such individual is unable to perform at least two activities of daily living without substantial assistance (including verbal reminding, physical cuing, or supervision) and is determined by the State involved to be in need of placement in a long-term care facility. (OAA, Sec 101 (45)).

Child: An individual who is not more than 18 years of age or who is an individual with a disability. (OAA, Sec. 372 (1)).

Disability: (Except when such term is used in the phrase "severe disability", "developmental disabilities", "physical or mental disability", "physical and mental disabilities", or "physical disabilities") a disability attributable to mental or physical impairment, or a combination of mental and physical impairments, that results in substantial functional limitations in 1 or more of the following areas of major life activity: (A) self care, (B) receptive and expressive language, (C) learning, (D) mobility, (E) self-direction, (F) capacity for independent living, (G) economic self-sufficiency, (H) cognitive functioning, and (I) emotional adjustment. (OAA, Sec 102 (8)).

Elder Abuse, Neglect, and Exploitation: Abuse, neglect, and exploitation, of an older individual. (OAA, Sec 102 (23)).

(1) Abuse: The willful: (a) infliction of injury, unreasonable confinement, intimidation, or cruel punishment with resulting physical harm, pain, or mental anguish; or (b) deprivation by a person, including a caregiver, of goods or services that are necessary to avoid physical harm, mental anguish, or mental illness. (OAA, Sec 102 (13)).

(2) Exploitation: The fraudulent or otherwise illegal, unauthorized, or improper act or process of an individual, including a caregiver or fiduciary, that uses the resources of an older individual for monetary or personal benefit, profit, or gain, or that results in depriving an older individual of rightful access to, or use of, benefits, resources, belonging, or assets. (OAA, Sec 101 (24)).

(2) Neglect means: (a) the failure to provide for oneself the goods or services that are necessary to avoid physical harm, mental anguish, or mental illness; or (b) the failure of a caregiver to provide the goods or services. (OAA, Sec 102 (34)).

(4) Physical Harm: Bodily injury, impairment, or disease. (OAA, Sec 102 (36)).

Family Caregiver: An adult family member, or another individual, who is an informal provider of in-home and community care to an older individual or to an individual with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction. (OAA, Sec 302 (4)).

Frail: With respect to an older individual in a State, that the older individual is determined to be functionally impaired because the individual: (A) is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; or at the option of the State, is unable to perform at least three such activities without such assistance; or (B) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual. (OAA, Sec 102 (26)).

Grandparent or other older relative caregiver of a child: A grandparent, step grandparent or other relative of a child by blood or marriage, who is 60 years of age or older and (a) lives with the child; (b) is the primary caregiver of the child because the biological or adoptive parents are unable or unwilling to serve as the primary caregiver of the child; and (c) has a legal relationship to the child, such as legal custody or guardianship, or is raising the child informally. (FSRR, 2005).

Greatest Economic Need: The need resulting from an income level at or below the poverty line. (OAA, Sec 102 (27)).

Greatest Social Need: The need caused by non-economic factors, which include: (A) physical and mental disabilities; (B) language barriers; and (C) cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, that: (i) restricts the ability of an individual to perform normal daily tasks; or (ii) threatens the capacity of the individual to live independently. (OAA, Sec 102 (28)).

Grandparent or Older Individual who is a Relative Caregiver: A grandparent or stepgrandparent of a child, or a relative of a child by blood, marriage, or adoption, who is 55 years of age or older and—(A) lives with the child; (B) is the primary caregiver of the child because the biological or adoptive parents are unable or unwilling to serve as the primary caregiver of the child; and (C) has a legal relationship to the child, as such legal custody or guardianship, or is raising the child informally. (OAA, Sec. 372 (3)).

Impairment in Activities of Daily Living: The inability to perform one or more of the following six activities of daily living without personal assistance, stand-by assistance, supervision or cues: eating, dressing, bathing, toileting, transferring in and out of bed/chair, and walking. (FSRR, 2005).

Impairment in Instrumental Activities of Daily Living: The inability to perform one or more of the following eight instrumental activities of daily living without personal assistance, or stand-by assistance, supervision or cues: preparing meals, shopping for personal items, medication management, managing money, using telephone, doing heavy housework, doing light housework, and transportation ability. (FSRR, 2005).

Living Alone: A one person household (using the Census definition of household) where the householder lives by his or herself in an owned or rented place of residence in a non-institutional setting, including board and care facilities, assisted living units and group homes. (FSRR, 2005).

Older Individual: An individual who is 60 years of age or older. (OAA, Sec 102 (35)).

Poverty: Persons considered to be in poverty are those whose income is below the official poverty guideline (as defined each year by the Office of management and Budget, and adjusted by the Secretary, DHHS) in accordance with subsection 673 (2) of the Community Services Block Grant Act (42 U.S.C. 9902 (2)). The annual HHS Poverty Guidelines provide dollar thresholds representing poverty levels for households of various sizes. (FSRR, 2005).

Rural: A rural area is any area that is not defined as urban. Urban areas comprise (1) urbanized areas (a central place and its adjacent densely settled territories with a combined minimum population of 50,000) and (2) an incorporated place or a census designated place with 20,000 or more inhabitants. (FSRR, 2005).

Severe Disability: Severe, chronic disability attributable to mental or physical impairment, or a combination of mental and physical impairments, that: is likely to continue indefinitely; and results in substantial functional limitation in 3 or more of the major life activities specified in subparagraphs (A) through (G) of paragraph (8) of the Older Americans Act, as amended. (OAA, Sec 102 (9)).

5. Ethnic Groups

Black or African American: A person having origins in any of the black racial groups of Africa. (FSRR, 2005).

American Indian or Alaskan Native: A person having origins in any of the original peoples of North America, and who maintains tribal affiliation or community attachment. (FSRR, 2005).

Asian: A person having origins in any of the original peoples of the Far East, Southeast Asia or the Indian Subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. (FSRR, 2005).

Native Hawaiian or Pacific Islander: A person having origins in any of the original peoples of Hawaii, Guam, Samoa or other Pacific Islands. (FSRR, 2005).

Hispanic or Latino: A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. (FSRR, 2005).

Indian: A person who is a member of an Indian tribe. (OAA, Sec 102 (5)).

Native American: Refers to American Indians, Alaskan Natives, and Native Hawaiians. (OAA, Sec 601).

Native Hawaiian: Any individual any of whose ancestors were natives of the area which consists of the Hawaiian Islands prior to 1778. (OAA, Sec 625).

White: A person having origins in any of the peoples of Europe, the Middle East, or North Africa. (FSRR, 2005).

6. Other Definitions

Aging and Disability Resource Center' means an entity established by a State as part of the State system of long-term care, to provide a coordinated system for providing— (A) comprehensive information on the full range of available public and private long-term care programs, options, service providers, and resources within a community, including information on the availability of integrated long-term care; (B) personal counseling to assist individuals in assessing their existing or anticipated long-term care needs, and developing and implementing a plan for long-term care designed to meet their specific needs and circumstances; and (C) consumers access to the range of publicly-supported long-term care programs for which consumers may be eligible, by serving as a convenient point of entry for such programs. (OAA, 102 Sec (44)).

Aging Network: The network of State agencies, Area Agencies on Aging, Title VI grantees, and the Administration; and organizations that are providers of direct services to older individuals or are institutions of higher education; and receive funding under this act. (OAA, Sec 102 (16)).

Area Agency on Aging: An Area Agency on Aging designated under section 305(a)(2)(A) of the Older Americans Act or a State agency performing the functions of an Area Agency on Aging under section 305(b)(5) of the Older Americans Act. (OAA, Sec 102 (17)).

Assistive Technology: Technology, engineering methodologies, or scientific principles appropriate to meet the needs of, and address the barriers confronted by, older individuals with functional limitations. (OAA, Sec 102 (10).

Elder Justice: Used with respect to older individuals, collectively, means efforts to prevent, detect, treat, intervene in, and respond to elder abuse, neglect, and exploitation and to protect older individuals with diminished capacity while maximizing their autonomy. Used with respect to an individual who is an older individual, means the recognition of the individual's rights, including the right to be free of abuse, neglect, and exploitation. (OAA, Sec 102 (47).

Long-term care: Any service, care, or item (including an assistive device), including a disease prevention and health promotion service, an in-home service, and a case management service— (A) intended to assist individuals in coping with, and to the extent practicable compensate for, a functional impairment in carrying out activities of daily living;

(B) furnished at home, in a community care setting (including a small community care setting as defined in subsection (g)(1), and a large community care setting as defined in subsection (h)(1), of section 1929 of the Social Security Act (42 U.S.C. 1396t)), or in a long-term care facility; and

(C) not furnished to prevent, diagnose, treat, or cure a medical disease or condition. (OAA, Sec 102 (50)).

Older Americans Act: An Act to provide assistance in the development of new or improved programs to help older persons through grants to the States for community planning and services and for training, through research, development, or training project grants, and to establish within the Department of Health, Education, and Welfare an operating agency to be designed as the "Administration on Aging". (Public Law 89-73).

Planning and Service Area: An area designated by a State agency under section 305(a)(1)(E), including a single planning and service area described in section 305(b)(5)(A) of the Older Americans Act. (OAA, Sec 102 (37)).

Minority Provider: A provider of services to clients which meets any one of the following criteria: 1) A not for profit organization with a controlling board comprised at least 51% of individuals in the racial and ethnic categories listed below. 2) A private business concern that is at least 51 % owned by individuals in the racial and ethnic categories listed below. 3) A publicly owned business having at least 51% of its stock owned by one or more individuals and having its management and daily business controlled by one or more individuals in the racial and ethnic categories listed below: The applicable racial and ethnic categories include: American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, or Hispanic. (FSRR, 2005).

Title III: The purpose of Title III is to encourage and assist State agencies and Area Agencies on Aging to concentrate resources in order to develop greater capacity and foster the development and implementation of comprehensive and coordinated systems to serve older individuals by entering into new cooperative arrangements in each State with the persons described in paragraph (2) (State agencies and Area Agencies on Aging; other State agencies, including agencies that administer home and community care programs; Indian tribes, tribal organizations, and Native Hawaiian organizations; the providers, including voluntary organizations or other private sector organizations, of supportive services, nutrition services, and multipurpose senior centers; and organizations representing or employing older individuals or their families) for the planning, and for the provision of, supportive services, and multipurpose senior centers, in order to secure and maintain maximum independence and dignity in a home environment for older individuals capable of self care with appropriate supportive services; remove individual and social barriers to economic and personal independence for older individuals; provide a continuum of care for vulnerable older individuals; and secure the opportunity for older individuals to receive managed in-home and community-based long-term care services. (OAA, Sec 301).

Sources:

(FSRR) Federal and State Reporting Requirements, 2005.

(OAA) Older Americans Act, as amended.