River Valley
AREA AGENCY ON AGING
710 Front Avenue, Suite A
Columbus, GA 31902

REQUEST FOR PROPOSAL (RFP)
FOR
Home and Community Based Services

RFP # 02-2020
For all questions about this RFP contact:
Marie Peterson-Barnes
mpeterson@rivervalleyrcaaa.org

Released On:
November 12, 2019

Due On:
December 19, 2019
4:00 p.m.
1. **INTRODUCTION**
   a) Purpose of Procurement Process
   b) AAA Vision, Mission, and Values
   c) **Overview of the RFP Process**
   d) **Schedule of Events**
   e) Restrictions on Communication with Staff
   f) Definition of Terms
   g) Contract Terms

2. **MANDATORY REQUIREMENTS**
   a) Offeror’s Qualification Requirements
   b) Business Requirements
   c) Mandatory Submission Requirements
   d) Budget Requirements

3. **TECHNICAL PROPOSAL**
   a) Company Structure
   b) Experience
   c) Financial Stability and Cash Flow
   d) Business Litigation
   e) Scope of Services *(See Appendix by Program)*

4. **BUDGET PROPOSAL**
   a) Budget Narrative
   b) Revenue Plan and Units/Persons/Cost Chart
   c) Uniform Cost Methodology Spreadsheet
   d) Budget Evaluation

5. **PROPOSAL SUBMISSION**
   a) Packaging of Proposals
   b) Number of Proposal Copies
   c) Submission of Proposal
      1. Issuing Office
      2. Rejection of Proposal
      3. Questions and Inquiries
      4. Response Date
      5. Revisions to Request for Proposals
      6. Submitted Proposals
      7. Acceptance of Proposal Content
6. ASSURANCES
   a) Letter of Transmittal

7. TERMS AND CONDITIONS
   a) RFP Amendments
   b) Proposal Withdrawal
   c) Cost for Preparing Proposal
   d) Sample Contract
   e) Conflict of Interest
   f) Minority Business Policy
   g) Reciprocal Preference Law O.C.G.A50-5-60(b)

8. SUGGESTED EVALUATION PROCESS
   a) Administrative Review
   b) Technical Proposal Evaluation
   c) Budget Proposal Evaluation
   d) Identification of Apparent Successful Offeror
   e) Rejection of Proposals/Cancellation of RFP

9. APPENDICES (Provide Other Forms and Documents Needed)
   a) Scope of Services by Program
      1. In-Home Services
      2. Elderly Legal Assistance Program
      3. Senior Center Recreation
      4. Menu Planning
   b) Home and Community Based Services Revenue Plan, Units/Persons and Cost Chart – See CD Rom disk included in package.
   c) Uniform Cost Methodology Manual and Spreadsheet – See CD Rom disk included in package.
   d) Sample AAA Sub-contract agreement – attached
1. INTRODUCTION

a) **Purpose of Procurement Process**

The River Valley Area Agency is requesting proposals from qualified offerors capable of providing Home and Community Based Services to include homemaker aide, personal care aide, in-home respite, senior center recreation, legal services, menu planning and in-home respite voucher program.

The successful offeror will provide homemaker aide, personal care aide, in-home respite, senior center recreation, legal services and in-home respite voucher program.

Offers must complete this RFP Request for Proposal to be considered and may bid on one or any combination of services listed above. River Valley Area Agency on Aging has the right to reject any and all proposals.

This RFP package should be used to respond to the following service or services:

1. Home and Community Based Services
2. Homemaker Services
3. In-Home Respite Care
4. In-Home Respite Voucher Program
5. Senior Center Activities / Recreation
6. Legal Services
7. Menu Planning

Homemaker, Personal Care, and In-Home Respite are services that are reimbursed on a unit cost basis.

Senior Recreation, In-Home Respite Care Voucher, Menu Planning and Legal Services are exempt from a unit cost reimbursement and budget must be prepared using a line item budget.

b) **AAA Vision, Mission, and Values –**

**Mission**

Create and sustain a livable community that promotes health and well-being for older adults and disabled persons. This will be achieved through information, education and accessibility to services and resources promoted through the AAA Gateway connection and community collaborations.
Vision

Being Informed * Being Prepared * Living Well

Values

• Be consumer oriented in answering the needs and questions in our community and respect the self-worth of all people.

• Have the forethought to be proactive in the evolving future of change.

• Keep the data base updated and accurate in providing the best screening and assessments possible.

• Respond to the changing needs of our community and advocate in their behalf

• Actively pursue new partnerships and continue to establish trust and commitment from those in existence.

• Promote the use of prevention benefits in securing a healthy future and in ensuring everyone has the opportunity to “Age in Place”.

• Strive for excellence.

• The River Valley AAA continually stays abreast of the core values of the Division of Aging Services and the Administration on Aging. These values are incorporated into our beliefs and provide the roadmap as we strive to live and age well.

c) **Overview of the RFP Process** – The objective of this RFP is to select one (or more) qualified Offerors to provide the services as outlined in the RFP to the River Valley Area Agency on Aging. This RFP process is conducted to gather and evaluate responses from Offerors for potential award. All qualified Offerors are invited to participate by submitting responses, as further defined below. After evaluation of all Offerors responses received prior to the closing date of this RFP and following negotiations (if any) and resolution of any contract exceptions, the preliminary results of the RFP process will be publicly announced, including the names of all participating Offerors and evaluation results.

d) **Schedule of Events** – This schedule of events set out herein represents the Area Agency’s best estimate of the schedule that will be followed. However, delays to the procurement process may occur which may necessitate adjustments to the proposed schedule. If a component of this schedule, such as the close date is delayed, the rest of the schedule may be shifted as appropriate. Any changes to the dates up to the closing date of the RFP will be publicly posted prior to the closing date of this RFP. After the close of the RFP, the Area Agency reserves the right to adjust the remainder of the proposed dates, including the dates of evaluation, negotiations, award and the contract term on an as needed basis with or without notice.
### REQUEST FOR PROPOSAL (RFP)
Fiscal Years 2021-2025

<table>
<thead>
<tr>
<th>Description</th>
<th>Specific Date or Date Ranges</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release of RFP</td>
<td>November 12, 2019</td>
<td>4:00 p.m.</td>
</tr>
<tr>
<td>Deadline for written questions sent via e-mail to the Issuing Officer referenced in Section</td>
<td>December 10, 2019</td>
<td>4:00 p.m.</td>
</tr>
<tr>
<td>Offeror’s Conference/Pre-Bid Conference (time/location) (enter time, complete address and if attendance is mandatory)</td>
<td>Monday, December 2, 2019 South Georgia Technical College John M. Pope Technology Center 900 South Ga Tech Parkway Americus, Georgia 31709 229-931-2040</td>
<td>10:30 a.m.</td>
</tr>
<tr>
<td>Responses to written questions</td>
<td>December 13, 2019</td>
<td>4:00 p.m.</td>
</tr>
<tr>
<td>Uniform Cost Methodology Training</td>
<td>Monday, December 2, 2019 South Georgia Technical College John M. Pope Technology Center 900 South Ga Tech Parkway Americus, Georgia 31709 229-931-2040</td>
<td>1:00 p.m.</td>
</tr>
<tr>
<td>Proposals Due/Close Date &amp; Time</td>
<td>December 19, 2019</td>
<td>4:00 p.m.</td>
</tr>
<tr>
<td>List other AAA specific dates and timeline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Evaluation Completed (on or about)</td>
<td>January 15, 2020</td>
<td>4:00 p.m.</td>
</tr>
<tr>
<td>Notice of Award (on or about)</td>
<td>January 21, 2020</td>
<td>4 p.m.</td>
</tr>
<tr>
<td>Contractors Begin Work</td>
<td>July 1, 2020</td>
<td>8 a.m.</td>
</tr>
</tbody>
</table>

- **Restrictions on Communications with Staff** - From the issue date of this RFP until a contractor is selected and the selection is announced, Offerors are not allowed to communicate for any reason with any AAA staff, except through the Issuing Officer named herein, or during the Offeror’s conference, or as provided by existing work agreement(s). The AAA reserves the right to reject the proposal of any Offeror violating this provision. All questions concerning this RFP must be submitted in writing (fax or email may be used) to the Issuing Officer. No questions will be accepted except in written format. Only written responses will be binding upon the AAA.

- **Definition of Terms** –

  **ADDITIONAL LOCAL FUNDS** - These funds are revenue generated from churches, city governments, county governments, private individuals, civic clubs, foundations,
fundraising, interest income, memorials, other federal grants, private corporations, United Way and other funds that can be used to support the program.

APPLICABLE LAWS AND REGULATIONS: All agencies making application for funds will be subject to conformance to all applicable laws and regulations. These shall include but are not limited to the Older Americans Act, The Federal Civil Rights Act of 1964 and 1991, The Rehabilitation Act of 1973, Fair Employment and Housing Act, Americans with Disabilities Act of 1990, Sections 503 and 505 of the Rehabilitation Act, Federal Regulations including 45 C.F.R. Part 74 and General Division of Aging Requirements.

APPROVED BUDGET-A budget (including any revised budget) which has been approved by the River Valley Area Agency on Aging.

AREA AGENCY ON AGING (AAA)-The River Valley Regional Commission Area Agency is designated by the Department of Human Services, Division of Aging Services to manage funding and programs in a sixteen (16) county area that comprises the River Valley Regional Commission member governments. The River Valley Regional Commission Area Agency on Aging performs a wide range of activities related to advocacy, planning, coordination, inter-agency linkages, information sharing, monitoring, technical assistance, training and evaluation. Services include Non-Medicaid Home and Community Based Programs for persons 60 and above. AAA’s were established under the Older Americans Act (OAA) in 1973 to respond to the needs of Americans aged 60 and over in every local community. The AAA receives Federal and State funding from the Division of Aging Services. These agencies offer programs that make a difference in the lives of all older adults from the frail older person who can remain at home if they receive the right services to those who are healthy and can benefit from the activities and socialization provided by a community-based program such as senior centers. Funds are allocated to service providers through a request for proposal process. AAA’s have more than 40 years’ experience administering and coordinating services for older adults.

AUTHORIZED SIGNATURE-The signature of the person who has the legal right to obligate the organization, i.e. Chairman of the Board of Directors, Agency Director, etc.

AVAILABILITY FUNDS - Funds for programs granted through an RFP process are contingent upon availability of State and Federal Funding. In the event additional funding becomes available, current contracts may be supplemented.

BUDGET-The applicant's detailed financial plan for carrying out a service contract.

CASH MATCH (CASH ONLY)-Cash includes money which has been designated for the operation of the service contract.

CONTRACT AWARD PROCESS-Contract awards will be made utilizing the River Valley Area Agency on Aging Evaluation Rating Form. The River Valley Area Agency on Aging reserves the right to award any contract to more than one provider for the same service. Final approval will be done by the River Valley Regional Council.
COST REIMBURSEMENT CONTRACTS-A contract in which the service provider is paid on the basis of the actual cost of providing the service not to exceed contracted amount.

DIVISION OF AGING SERVICES (DAS)-The Georgia Division of Aging Services is the governing agency over the twelve (12) Area Agencies on Aging in the State of Georgia.

IN-KIND MATCH (NON-CASH)-includes resources other than cash which are used in providing this service. These may include, but are not limited to donated rent and/or utilities; recorded hours of volunteers working on projected or related activities; donated consultant time; donated equipment or supplies; donated employees’ time, etc. The value of the in-kind donation should relate to real costs, for example the per hour value of the work done by a volunteer, or the fair market value of donated office space. The method of determining the value of in-kind match must be documented and available for review by AAA staff.

MATCHING REQUIREMENT-A Local 10% cash match (Cash Only) or in-kind match (Non-Cash) is required for all Older American Funds. Social Services Block Grant requires a 12% match. Other Fund Sources that do not require a match are Alzheimer’s Program State Funds, Aging and Disabilities Resource Connection (ADRC), Community Based Services Program, Community Care Services Program.

OLDER AMERICANS ACT (OAA) was passed in 1965 as part of President Johnson’s “Great Society” initiative with the goal of supporting older Americans to live at home and in the community with dignity and independence for as long as possible. This Act is supported by federal funds for the provision of services to people 60 years of age and older.

PAYMENT PROCEDURE-Reimbursement for any contract entered into as a result of this RFP will be made monthly upon submission of financial reports received by the sixth (6th) working day of each month. Note: Delays in receiving financial reports will result in delays in receipt of funds from the Division of Aging and payments to providers.

PROGRAM INCOME-Client contributions for direct service received. It cannot be used as local matching funds. Program income is utilized to expand services.

PROJECTED COST SHARE-Cost share is the amount of money that will be collected from the client or caregiver for their share in the cost to provide the service. The cost share is determined from a sliding fee scale based on the client’s income and is published by the Division of Aging Services on an annual basis. Cost share cannot be required for meals.

PROJECTED VOLUNTARY CLIENT CONTRIBUTION-Confidential voluntary client contributions are used toward the costs of providing services that the program participants receive. It cannot be used as local matching funds. Volunteer client contributions are utilized to expand services. Federal Regulations under the Older Americans Act require that each service provider must provide for older persons to contribute toward the cost of the service. Contributions must be voluntary and confidential; no service can be denied if an older person will not or cannot contribute to the cost of the
service. Agencies applying for funding must have an established system to determine the estimated cost of the service and the ability to accept contributions.

PROVIDER OR SERVICE PROVIDER-Any agency or organization receiving State and/or Federal funds from the River Valley Area Agency on Aging.

REQUEST FOR PROPOSAL (RFP)-Open and competitive process for rewarding funds for aging services in the sixteen (16) county area. Service providers will provide services to assist older persons and their caregivers to remain independent as long as possible. This process can be a bid for one service, a combination of services, or all services located within the sixteen (16) county area. Applicants mailing proposals should allow for normal mail delivery to ensure the timely arrival of their proposals.

SUBCONTRACTOR or SUB-GRANTEE-Any agency or organization receiving State and/or Federal funds from the River Valley Area Agency on Aging through an approved contract process.

TARGET POPULATIONS-All programs and services shall be targeted toward seniors 60 and older, persons with disabilities and family caregivers, except for the Alzheimer’s State Program which provides services to persons 18 years and older in the greatest economic and social need as well as ethnic minorities. Definitions of greatest economic need and social need are:

- **FRAIL AND DISABLED ELDERLY**-Persons aged 60 and over having acute or chronic health conditions, physical or mental disability, including having Alzheimer's Disease or a neurological or organic brain disorder of the Alzheimer's type, that restricts the ability of an individual to perform individually or live independently.

- **GREATEST ECONOMIC NEED**-Seniors 60 and over whose monthly income is at or below the Federal Poverty Guidelines as defined each year by the Federal Administration on Aging/ U.S. Department of Health and Human Services. For targeting purposes, factors indicating economic need are sources of income (SSI, food stamps, Medicaid, etc.) or income at or below 100% of the federal poverty level.

- **GREATEST SOCIAL NEED**-Seniors 60 and older who have at least two of the following characteristics: Physical and/or mental disabilities, language barriers, isolation caused by cultural, racial or ethnic status, social or geographic isolation.

- **HANDICAPPED**- Defined by the U.S. Dept. of Health and Human Services as a physical or mental impairment which substantially limits one or more major life activities. Major life activities include the following functions: caring for oneself, performing manual tasks, walking, seeing, hearing and speaking.

- **LOW-INCOME MINORITIES**-Minority elderly, as defined below, with an annual income at or below the Federally established poverty level.
• **LOW-INCOME NON-MINORITY** - Those aged 60 and over with an annual income at or below the Federally established poverty income level. Non-minority older adults are those who are not listed in the minority group below.

• **MINORITIES** - Persons aged 60 and over who are: African American; Hispanic Origin (Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures, regardless of race); American Indian or Alaskan Native; and Asian American/Pacific Islander (origins in the far east, Southeast Asia, India, Afghanistan, Pakistan, China, Japan, Korea, Philippine Island, Samoa and Hawaiian Islands).

**UNIFORM COST METHODOLOGY** - The Uniform Cost Methodology is a system by which all providers will prepare budgets in responding to Requests for Proposals for aging services. The purpose of the methodology is to have all providers calculate service costs in the same fashion, treating costs in a consistent manner. The DHS Division of Aging Services, in partnership with the aging network, has implemented the uniform cost methodology to be used by all provider agencies. This allows the Area Agency on Aging to evaluate costs of programs and services based on consistent treatment of costs by all provider agencies and a consistent method for allocating costs to all programs and services. This does not mean that resultant service costs will be the same across the state or within an individual Planning and Service area between providers; rather, all providers will calculate their costs using the same methodology.

**UNIT COST** - A rate in which the service provider is paid on the basis of a predetermined cost per unit of service provided. Unit rate service contracts must serve all projected units in order to receive full reimbursement from the River Valley Area Agency on Aging.

**URBAN AND RURAL** - The Census Bureau’s urban-rural classification is fundamentally a delineation of geographical areas, identifying both individual urban areas and the rural areas of the nation. The Census Bureau’s urban areas represent densely developed territory, and encompass residential, commercial, and other non-residential urban land uses. The Census Bureau delineates urban areas after each decennial census by applying specified criteria to decennial census and other data.

The Census Bureau identifies two types of urban areas:

- Urbanized Areas (UAs) of 50,000 or more people;
- Urban Clusters (UCs) of at least 2,500 and less than 50,000 people.

“Rural” encompasses all population, housing, and territory not included within an urban area.

**Contract Terms** - The contract will be on a State of Georgia fiscal year (SFY) basis (July 1-June 30). The contract will have annual options to renew July 1, 2021 – June 30, 2025. There will be three (3) additional contract periods with a contract end date of June 30 each year. The annual renewal of the Offeror’s contract shall be based on the availability of funds and the Offeror’s successful contract performance the preceding year. Contract award will be by the issuance of a Notice of Award. Renewals will be accomplished through the issuance of Notice of Award Amendments. The River Valley Regional Commission Area Agency on Aging may terminate the contract due to non-availability of funds, due to default or for cause, or for convenience. All contracts resulting from this Request for Proposal process are contingent on
the availability of funds from the Georgia Department of Human Services (DHS) Division of Aging Services. The terms and conditions of the contract with DHS and any subsequent policy decisions, laws, or regulations shall be applied to the contractor chosen through this process. Budget planning allocations are for one (1) year only. The allocations are subject to change based on the Federal and State allocations received by the River Valley Area Agency on Aging. In addition to funding being contingent upon availability, successful bidders must also demonstrate adequate and acceptable performance to continue to receive funding. Budgets, units provided, and unit costs will be reviewed annually and adjustments to contracts will be made based on actual expenditures, units delivered, number of persons served, and allocations received through the Georgia Department of Human Services (DHS) Division of Aging Services. During this RFP process, one (1) year budgets for each service the bidder is proposing will be reviewed in accordance with directives provided by the DHS Division of Aging Services.

2. MANDATORY REQUIREMENTS

This section identifies all mandatory requirements which must be present in the proposal before further consideration will be given. Offeror’s response indicates the page number(s) where each mandatory requirement is substantiated.

a) **Offeror’s Qualification Requirements** - Offeror must have a minimum of 4 years’ experience providing Home and Community Based Services or similar services.

b) **Business Requirements** - List here any business requirements that must be met prior to AAA accepting this proposal. **Offeror for the Elderly Legal Assistance Program must have a minimum of four (4) years’ experience providing Elderly Legal Assistance Program service or similar services. Please provide any Business License necessary to provide Elderly Legal Assistance service. Menu Planning must be provided by a licensed nutritionist with at least 4 years experience.**

c) **Mandatory Submission Requirements** –
   i) **Complete all budget documents and narrative.**
   ii) **Respond to all sections of the proposal.**
   iii) **Sign all required forms.**

d) **Budget Requirements** – AAA provides allocation and budget forms. Offeror’s budget proposal includes a narrative that details their budget and service plan. **Offeror must submit a narrative to discuss costs and/or revenue and persons/units served. Must have completed UCM spreadsheet (either short form or long form). Commercial vendors excluded from UCM spreadsheet.**

d) **Hardware/Software Equipment Requirements**

Listed below are the minimum specifications for equipment, the operating systems, and software required for providers to access DAS Data System applications.
Operating System: Windows 7/Windows 8.1/Windows 10

Browser: Certified: Internet Explorer 11
NOTE: If using DAS Data System versions 8.1.1 or later, Internet Explorer Compatibility View settings should be disabled. For versions prior to 8.1.1, Internet Explorer Compatibility View is required.

Processor: 2.0 GHZ processor or better

RAM: 2 GB (minimum 4 GB (recommended)

Screen Resolution: Minimum: 1024x768 (1280x1024 is ideal)

Internet Access:* 40-45 Kbps (kilobytes per second recommended for each concurrent user)

Maximum Latency 100ms or less

Microsoft


Note that Microsoft Office 2013 is only Supported for Windows 10 at this time.

*DAS Data System does not support dial-up access.

3. TECHNICAL PROPOSAL – This section identifies the information which must be submitted in the Technical Proposal. Offeror must demonstrate their ability to satisfy all Qualifications and Technical Requirements to perform the required services. The technical proposal must be structured in the following order and labeled with the corresponding titles stated below using the same outline numbers. **Note: Items 3 a), b), c) and d) are only required to be submitted once even if applying for multiple services.**

a) Company Structure - The Offeror will include the following information:

1. Offeror must submit an organizational chart displaying its overall business structure.
2. Offeror shall include in the proposal the legal form of their business organization, the state of incorporation (if a corporation), the business office location, hours of operation, and the contact name during the term of any resulting contract.
3. Offeror shall submit a list of Board of Directors and/or Advisory Board members, including their occupations and addresses.

b) Experience - The Offeror must have at least four (4) full consecutive years’ experience as a Home and Community Based Services Provider. The River Valley Area Agency on Aging reserves the right to verify all information submitted regarding Offeror’s experience, education and other qualifications.

1. The Offeror will provide a list of all organizations for whom similar services, as detailed in the RFP, have been provided during the past (4) years. This list will include:
   a) Name of contact person
   b) Title of contact person
c) Phone number of contact person  
d) Description of the work performed  
e) Time period of the project or contract  
f) Staff months required  
g) Contract Amount  
h) Customer reference (including contact person, e-mail address and current telephone number)  

2. The Offeror will also disclose any services terminated by the organizations and the reason(s) for termination and Dates of Service.

3. WhichOfferor will provide details of its experience, minimum of (4) years, as required above. Information submitted should demonstrate that the Offeror has sufficient experience to successfully meet the requirements of this program or service.
   A. Offeror will submit detailed documents of its experience as required above, to include two (2) letters of recommendation from the state or local agency where the experience was obtained which shall meet the following requirements:
      1. Must be submitted on letterhead of the party submitting the recommendation and must contain current telephone numbers, mailing address, and e-mail addresses for points of contact.  
      2. Contact individuals submitting recommendations must be current employees of the organization and authorized to make recommendations on behalf of the organization.  
      3. Contact individuals should be able to attest to the Offeror’s qualifications relevant to experience in providing services similar to those contained in this RFP.  
      4. Letters of Recommendations shall be dated no more than six (6) months prior to the proposal submission date  

   c) Financial Stability and Cash Flow – The Offeror will provide financial information that would allow proposal evaluators to ascertain the financial stability of the agency.
      A. A copy of the Offeror’s most recent audit report.  
      B. If a private company, the Offeror will provide a copy of their most recent internal financial statement, and a letter from their financial institution, on the financial institution’s letterhead, stating the Offeror’s financial stability.  
      C. Offeror’s financial plan to maintain adequate cash flow without interruption to services pending reimbursement from this contract.  
      D. A description of any cash flow problems in the recent past that could not be resolved within 90 days.  

d) Business Litigation – The Offeror will disclose any involvement by the organization or any officer or principal in any material business litigation within the last five (5) years. The disclosure will include an explanation, as well as the current status and/or disposition. Failure to fully disclose or accurately state litigation may result in the proposal not being further reviewed.  

e) Scope of Services for each Program – See Appendix for Scope of Services for specific program or service that the Offeror is bidding on in this RFP
1. Program Legislation, Regulation, Program Standards and/or Guidelines:

- Older Americans Act (https://acl.gov/about-acl/authorizing-statutes/older-americans-act)
- DHR/DAS Home and Community Based Services Program Guidelines, HCBS Manual (https://odis.dhs.ga.gov/General) and other rules, regulations, standards and transmittals promulgated by the State of Georgia and the Area Agency on Aging program directives.
- DHS/DAS Georgia Elderly Legal Assistance Program Standards and other rules, regulations, standards and transmittals promulgated by the State of Georgia and the Area Agency on Aging program directives.

4. BUDGET PROPOSAL

a) Offeror must provide a Budget Narrative to explain projected cost and local revenue leveraged on behalf of the program.

b) Offeror completes the Revenue Plan and Unit/Persons Served and details the revenue available to support each program or service. If this is a unit cost reimbursed service, then it must match the unit cost as detailed on the Uniform Cost Methodology Spreadsheet. If this is a line item reimbursed service, then the total allowable costs should be the same as detailed on the Uniform Cost Methodology Spreadsheet.

c) Offeror has completed the Uniform Cost Methodology Spreadsheet as provided in and completed the UCM spreadsheet as required.

5. PROPOSAL SUBMISSION

a) Packaging of Proposals – The Applicant’s proposal in response to this RFP must be divided into two appropriately labeled and sealed packages. Return address must include Contact Name, Name of Company, address, RFP #, and phone number. Do not include cost information in the technical proposal – must have separate copies and/or CDs for 3.0 Technical Proposal and 4.0 Budget Proposal.

b) Number of Proposal Copies – Submit one original with signatures marked “Original” and four (4) hard copies and include one CD in Microsoft Office Suite for Word and Excel, 2003 version or later.

c) Submission of Proposals

1. Issuing Office - The River Valley Area Agency on Aging issues this Request for Proposal (RFP). The River Valley Area Agency on Aging is the sole point of contact for this RFP and subsequent revisions.

2. Rejection of Proposal: The River Valley Area Agency on Aging reserves the right to reject any or all proposals, or to award in whole or in part if deemed to be in the best interest of the AAA to do so. The Director of the Area Agency shall have authority to award orders, contracts or agreements to the Offeror’s that offer the best proposal to the AAA, cost and other factors considered.
3. **Questions and Inquiries:** It is the policy of the Area Agency to accept questions in writing or by e-mail from any and all Offeror’s interested in implementing the services identified in the RFP. Questions should be submitted to *Marie Peterson Barnes*. The AAA will transmit to all responders all questions and the Area Agency’s responses according to the Schedule of dates.

4. **Response Date:** In order to be considered for selection, proposals must arrive at the issuing office on or before the date and time specified. Offerors choosing to mail proposals should allow for normal mail delivery to ensure timely receipt of their proposal by the Area Agency. **Proposal received after the identified due date and time or submitted by any other means than those expressly permitted by the RFP will not be considered.** Proposals must be complete in all respects, as required in each section of this RFP.

5. **Revisions to Request for Proposals:** The Area Agency reserves the right to revise the Request for Proposal at any time prior to award. In the event it becomes necessary to revise any part of this RFP, information regarding revisions will be provided to all Offerors.

6. **Submitted Proposals:** In order be considered for selection, offerors must submit a complete response to this RFP including, at a minimum, all the mandatory requirements, technical proposal, budget proposal, and letter of transmittal concerning assurances. One original and four (4) of copies of each proposal must be submitted to the issuing office if mailed or hand delivered. The submitting agency shall make no other distribution of the proposals.

7. **Acceptance of Proposal Content** – The contents of the proposal of the successful bidder will become a part of any contract awarded as a result of these specifications.

6. **ASSURANCES**

   a) **Letter of Transmittal**

   All offerors are required to submit a mandatory transmittal letter, which shall be in the form of a standard business letter, which shall be signed by an individual authorized to legally bind the offer. The terms and conditions of the procurement are included. The Letter of Transmittal shall include:

   1. If a corporation, a statement indicating that the offeror is registered and in good standing with the Georgia Secretary of State to do business in the State of Georgia as state in §3.0. All proposed subcontractors must be identified, and a statement included indicating the exact nature and amount of work to be done by the prime contractor, and by each subcontractor, as measured by price.

   2. A Statement that the offeror does not discriminate in its employment practices with regard to race, religion, age (except as provided by law), marital status, political affiliation, national origin, or disability. (Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, as amended; the Americans with Disabilities Act of 1990).
3. A statement that the proposal meets the requirements set forth in the RFP plus any amendments. Amendments, if any, must be specified.

4. A statement that the person signing the proposal is the person in the offeror organization responsible for, or authorized to make, decision as to the prices quoted.

5. Certifications that prices proposed have been arrived at independently without collusion, communication, or agreement relating to such prices with any other offeror or competitor.

6. If the proposal deviates from the detailed requirements of this RFP, the transmittal letter must identify and explain all such deviations that appear in the body of the proposal. The River Valley Area Agency on Aging reserves the right to reject any proposal containing deviations or require modifications before acceptance.

7. If the use of subcontractor(s) is proposed, a statement from each subcontractor must be appended to the transmittal letter, signed by an individual authorized to legally bind the subcontractor, and stating:
   a. The general scope of work to be performed by the subcontractor;
   b. The subcontractor’s willingness to perform the work indicated; and
   c. That the subcontractor does not discriminate in its employment practices with regard to race, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or disability.

8. A statement indicating that the organization and its subcontractors, if any, will be compliant with the Health Insurance Portability and Accountability Act (Public Law No 104-191, 110 Stat. 1936), including its Privacy, Security and Electronic Data Interchange standards and regulations and any and all signed business associate or other agreements for the River Valley Area Agency on Aging and the Department of Human Resources. Failure to sign the business associate agreement or to be compliant with HIPAA laws and regulations or Division or AAA policy will be a basis for rejection. Additionally, since federal funds may be included, an RFP Signature page, Certification Regarding Lobbying and Certification Regarding Debarment are included for signature. Failure to sign these certification forms will be a basis for rejection.

9. Statement indicating that Contractual and Administrative Assurances required by the RFP are given.

10. Statement indicating the organization’s solvency to meet performance requirements with the most recent certified financial audit attached.

11. The name, address, and telephone number of the individual(s) who can be contacted from 8:00 a.m. to 5:00 p.m. during business days for questions regarding the proposal.

12. A statement that the offeror accepts the River Valley Area Agency on Aging’s sole right to cancel the RFP at anytime or amend the RFP before the due date for proposals.

13. A statement that offeror accepts the River Valley Area Agency on Aging’s sole right to alter the timetables for procurements as set forth in the RFP.

14. A statement that all responses become the property of the River Valley Area Agency on Aging and will not be returned to the offeror. The River Valley Area Agency on Aging will have the right to use all ideas or adaptations of ideas contained in any response received. Selection or rejection of the response will not affect this right.

15. A statement that the offeror accepts the terms, conditions, criteria and requirements set forth in the RFP.

16. The name and address of offeror to be used for all notices sent by the River Valley Area Agency on Aging.
17. A statement that no contact, direct or otherwise, has occurred with any employee of the River Valley Area Agency on Aging or DHS Division of Aging Services staff with direct involvement with the RFP process or program information, except as permitted by the RFP. Further, a statement that any subcontractor listed by the offeror complied with the restriction on communications as well.

18. A statement that no relationship exists nor will exist during the contract period, should offeror enter into a contract with the River Valley Area Agency on Aging that interferes with fair competition or is a conflict of interest.

19. A statement that no relationship exists between the offeror and another person or organization that constitutes a conflict of interest with respect to an existing contract with the AAA.

20. A statement that no claim will be made for payment to cover costs incurred in preparation of the submission of the proposal or any other associated costs.

21. Prior to award, the apparent successful Offeror will be required to enter into discussions with the River Valley Area Agency on Aging to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within one (1) week of notification, if not, this could lead to rejection of the Offeror’s proposal and discussions initiated with the second highest scoring offeror.

22. An award will be made to the offeror whose response is determined to be the lowest responsible bid and most advantageous to the River Valley Area Agency on Aging, taking into account price and other evaluation criteria. Staff or other agencies and consultants may be involved in the evaluation of the responses. The River Valley Area Agency on Aging reserves the right to reject any and all responses submitted.

7. **TERMS AND CONDITIONS**

The contract that the Area Agency expects to award as a result of this RFP will be based upon the RFP, the successful Offeror’s final response as accepted by the Area Agency and the contract terms and conditions, which are attached to this RFP. The successful Offeror’s final response as accepted by the Area Agency shall mean the final cost and technical proposals submitted by the Awarded Offeror and any subsequent revisions to the Awarded Offeror’s cost and technical proposals and the contract terms and conditions due to negotiations, written clarifications or changes made in accordance with the provisions of the RFP, and any other terms deemed necessary by the Area Agency, except that no objection or amendment by any Offeror to the RFP requirements or the contract terms and conditions shall be incorporated by reference into the contract unless the Area Agency, has explicitly accepted the Offerors objection or amendment in writing.

Please review the AAA’s contract terms and conditions prior to submitting a response to this RFP. Offerors should plan on the contract terms and conditions contained in this RFP being included in any award as a result of this RFP. Therefore, all costs associated with complying with these requirements should be included in any pricing quoted by the Offerors. The contract terms and conditions may be supplemented or revised before contract execution and are provided to enable the Offerors to better evaluate the costs associated with the RFP and the potential resulting contract.

**Exception to Contract**
By submitting a proposal, each Offeror acknowledges its acceptance of the RFP specifications and the contract terms and conditions without change except as otherwise expressly stated in the submitted proposal. If an Offeror takes exception to a contract provision, the Offeror must state the reason for the exception and state the specific contract language it proposes to include in place of the provision. Any exceptions to the contract must be submitted with the Offeror’s response. Exceptions must be in an original document using the track changes functionality and may not be submitted in the form of highlighted changes to the original contract. Proposed exceptions must not conflict with or attempt to preempt any mandatory requirements specified in the RFP.

In the event the Offeror is selected for potential award, the Offeror will be required to enter into discussions with the Area Agency to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within the time identified in the schedule or events. Failure to resolve any contractual issues will lead to rejection of the Offeror. The Area Agency reserves the right to proceed to discussions with the Offeror ranked next best Offeror.

The River Valley Area Agency on Aging reserves the right to modify the contract to be consistent with the apparent successful offer, and to negotiate other modifications with the apparent successful Offeror. Exceptions that materially change the terms or the requirements of the RFP may be deemed non-responsive by the Area Agency, in its sole discretion, and rejected. Contract exceptions which grant the Offeror an impermissible competitive advantage, as determined by the Area Agency, at its sole discretion, will be rejected. If there are any questions whether a particular contract exception would be permissible, the Offeror is strongly encouraged to inquire via written question submitted to the Issuing Officer prior to the deadline for submitting written questions as defined by the Schedule of Events.

a) **RFP Amendments** – The AAA reserves the right to amend the RFP prior to the proposal due date and provide notification of any amendments through written correspondence.

b) **Proposal Withdrawal** – A submitted proposal may be withdrawn prior to the due date by written request to the Issuing Officer. A request to withdraw a proposal must be signed by an authorized individual.

c) **Cost of Preparing a Proposal** – The cost for developing the proposal is the sole responsibility of the Offeror. The Area Agency will not provide reimbursement for such costs.

d) **Sample Contract** – The Sample Contract, which the Area Agency intends to use with the successful Offeror, is attached to this RFP in the Appendix. Exceptions to the Contract should be identified and submitted with the Offeror’s proposal. Proposed exceptions must not conflict with or attempt to preempt mandatory requirements of the RFP. Prior to award, the apparent winning Offeror will be required to enter into discussions with the AAA to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within one (1) week of notification. Failure to resolve contractual differences will lead to rejection of the Offeror’s proposal. The AAA reserves the right to modify the Contract to be consistent with the successful offer and to negotiate...
with the successful Offeror other modifications, provided that no such modifications affect the evaluation criteria set forth herein or give the successful Offeror a competitive advantage.

e) **Conflict of Interest** – If an Offeror has any existing client relationship that involves the AAA, the Offeror must disclose each relationship.

f) **Minority Business Policy** – It is the policy of the AAA that minority business enterprises shall have a fair and equal opportunity to participate in the AAA procurement process. Therefore, the AAA encourages all minority business enterprises to compete for, win and receive contracts for services.

g) **Reciprocal Preference Law (OCGA 50-5-60(b)** – For the purposes of evaluation only, Offerors resident in the State of Georgia will be granted the same preference over Offerors resident in another State in the same manner, on the same basis, and to the same extent that preference is granted in awarding bids for the same goods or services by such other State to Offerors resident therein over Offerors resident in the State of Georgia. NOTE: For the purposes of this law, the definition of a resident Offeror is one who maintains a place of business with at least one employee inside the State of Georgia. A post office box address will not satisfy this requirement.

8. **SUGGESTED EVALUATION PROCESS**

a) **Administrative Review** – The proposals will be reviewed by the designated staff for the following administrative requirements: 1) separately sealed Mandatory Requirements/Technical Proposal and Budget Proposal submissions. 2) All required documentation has been submitted. 3) The Technical Proposal does not include any information from the Budget Proposal. 4) All documents requiring an original signature have been signed and are included.

There are no points assigned to this section. Either yes or no. If not available, proposal will not be reviewed.

<table>
<thead>
<tr>
<th>Administrative Review – (No points assigned for this section. Either yes or no, and if not available, then Technical Proposal or Budget Proposal will not be reviewed.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2.0 Mandatory Requirements Satisfied</strong></td>
</tr>
<tr>
<td>▪ Offeror meets all the stated Qualification Requirements</td>
</tr>
<tr>
<td>▪ Offeror meets all stated Business Requirements</td>
</tr>
<tr>
<td>▪ Offeror submitted all stated Submission Requirements</td>
</tr>
<tr>
<td>▪ Offeror meets budget requirements</td>
</tr>
<tr>
<td>▪ Offeror meets the hardware/software/internet requirements outlined.</td>
</tr>
<tr>
<td><strong>4.0 Budget Proposal</strong></td>
</tr>
<tr>
<td>▪ Budget Narrative Submitted</td>
</tr>
<tr>
<td>▪ Revenue Plan and Units/Persons for:</td>
</tr>
<tr>
<td>▪ Uniform Cost Methodology Spreadsheet Completed</td>
</tr>
<tr>
<td><strong>5.0 Proposal Submission</strong></td>
</tr>
<tr>
<td>▪ Proposals Packaged and Delivered according to Requirements</td>
</tr>
<tr>
<td>▪ Correct # of Proposals Submitted</td>
</tr>
<tr>
<td>▪ Proposals Submitted in a timely matter</td>
</tr>
</tbody>
</table>
a) **Technical Proposal Evaluation** – Mandatory Requirements Review and Scope of Services will be reviewed by the Technical Evaluation Team for quality. Technical proposal will be evaluated and scored based on a ratio of the total points available for both technical and budget sections. The Maximum Number of Points assigned to this section is 700.

b) **Budget Proposal Evaluation** – Offeror will use only the Budget Proposal forms provided with this RFP. Budget proposals will be evaluated and scored based on a ratio of total points available for both technical and budget sections. The Maximum Allowable Points for the Budget Proposal is 300.

The review committee will evaluate responses and assign points based on the following criteria:

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>MAXIMUM POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Administration Review</td>
<td>0</td>
</tr>
<tr>
<td>B. Technical Proposal Evaluation</td>
<td>700</td>
</tr>
<tr>
<td>C. Budget Proposal</td>
<td>300</td>
</tr>
<tr>
<td>TOTAL POINTS</td>
<td>1,000</td>
</tr>
</tbody>
</table>

b) **Identification of Apparent Successful Offeror** – The resulting Budget Proposal scores will be combined with the Technical Proposal score. The Applicant with the highest combined technical and budget score will be identified as the apparent successful Applicant.

c) **Rejection of Proposals/Cancellation of RFP** – The Area Agency reserve the right to reject any and all proposals, to waive any irregularity or informality in a proposal, and to accept or reject any item or combination of items, when to do so would be to the advantage of the Area Agency. It is also within the right of the Area Agency to reject proposals that do not contain all elements and information requested in this document. The Area Agency reserves the right to cancel this RFP at any time. The Area Agency will not be liable for any cost/losses incurred by the Offerors throughout this process.

9. **APPENDICES (Provide Other Forms and Documents as needed)**

a) **Scope of Services by Program** –
   1. Elderly Legal Services Program
   2. Home and Community Based Services
   3. Senior Center Recreation
   
   **Note:** Congregate/Home Delivered Meals, LTCO and SCSEP have a separate Request for Proposal
b) **Revenue Plan, Units/Persons and Cost Chart** – AAA provides the chart for the Offeror to complete and include in the Budget proposal (Excel Spreadsheet)

c) **Uniform Cost Methodology Training Manual and Spreadsheet** – AAA provides the UCM Training Manual and Excel spreadsheet for Offeror to complete this budget requirement for the Budget Proposal

d) **AAA to provide SMART Objectives form from Area Plan Format & Instructions for appropriate for each goal and service in the Request for Proposal**

e) **AAA to provide Sample AAA Sub-contract agreement**
APPENDIX A-3 – ELDERLY LEGAL SERVICES PROGRAM (ELAP)

A. Purpose of Procurement

The River Valley Area Agency on Aging is requesting proposals from qualified offerors capable of providing Elderly Legal Assistance Program Services

The successful offeror will provide: Elderly Legal Assistance Program

B. Program Legislation, Regulation, Program Standards and/or Guidelines:

- Administration on Aging web page for Older Americans Act, USCA § 3058(j); 42 CFR § 1321.51 (c) and §1321.71 (http://www.aoa.gov/about/legbudg/oaa/OAA-compilation-unofficial.pdf)
- DHS/DAS Georgia Elderly Legal Assistance Program Standards and other rules, regulations, standards and transmittals promulgated by the State of Georgia and the River Valley Area Agency on Aging program directives.

C. Capacity - Outline offeror’s background and capacity to provide this service effectively. Address sustainability and the qualifications of Offeror’s organization and staff to provide services as proposed.

- Describe how the Offeror will interface with the River Valley Area Agency on Aging and/or Division of Aging Services to resolve issues effectively related to service delivery and clients.
- Discuss the qualifications and capability to provide effective services that will meet all program standards.
- Organizational chart (provided in Section 3.1) which demonstrates effective lines of communication and program responsibility, and detail percent of staff time assigned to each service or program.
- State when (days and hours of operation) and where services will be provided, and if alternate delivery sites are used, identify each site and days and hours of operation.

D. Information and Referral

- Describe how Offeror will interface with the River Valley Area Agency on Aging (AAA) Gateway/ADRC Information and Assistance and their management of the waiting list.

E. Special Initiatives or Collaborations:

- Describe any special initiatives, innovations that will enhance Offeror’s program in the community.
- Describe any new or on-going plans to obtain additional financial support or resources for this program.
- Describe any partnerships or collaborations with other community organizations or private businesses that will strengthen the services provided by Offeror.

F. Outreach or Marketing Plan

- Describe the program awareness activities or marketing plan for agency.
- Describe the methods Offeror will use to provide outreach to persons in the community as well as minorities, homebound or otherwise isolated individuals.
REQUEST FOR PROPOSAL (RFP)  
Fiscal Years 2021-2025

- Describe any special materials or techniques Offeror has developed to reach special populations.
- Describe any specific populations Offeror will target, if any.
- Describe methods to be used to provide services to Limited English Proficiency/Sensory Impaired (LEP/SI) clients.

G. Professional Staff Development

- Describe how Offeror will provide new staff orientation and training and provide an outline of the orientation schedule and topics.
- Describe Offeror’s plan for conducting on-going staff training including topics and number of training sessions to be held.
- Describe method Offeror will use to determine the training needs of staff.
- Describe the agency’s staff recruiting practices and retention strategies. Indicate the annual staff turnover rate from the most recent fiscal year.

H. Client Confidentiality

- Describe policy or procedures concerning client confidentiality

I. Technology and Ability to Meet Reporting Requirements

- Describe agency’s capacity for and use of technology, both in agency administration and delivering services.
- Describe agency’s strategic plan for maintaining adequate stock including hardware, software and voice/data services.
- Indicate capacity or plan to interface with the Division of Aging Services Aging Information Management System (AIMS) for reporting.
- Detail person(s) responsible for data validation, data entry and reporting.

J. Quality Assurance Program or Plan:

- Describe how Offeror will ensure the quality of the program or services to clients.
- Describe how Offeror will measure the effectiveness of your program.
- Describe how Offeror will determine if the program had an impact on the clients.
- Describe how Offeror will determine the client’s satisfaction with services.
K. ELDERLY LEGAL ASSISTANCE PROGRAM NARRATIVE

A. DESCRIPTION OF SERVICE DELIVERY MODEL

1. What qualifies this provider to be the entity best able to provide legal assistance to the elderly in this planning and service area? Your response should be more specific than the history of your office, practice or organization. That response is requested in Question #2. Tailor your response so that it clearly indicates that your office, practice and/or staff have experience in the provision of legal assistance to older Georgians in a defined service area, like the planning and service area that would be served and the current capacity to provide that service.

2. DESCRIPTION OF PROVIDER – Identify specifically, what office, practice or organization. Give a brief narrative description of the legal assistance program (e.g., a legal service corporation grantee, non-profit agency or private lawyer). Discuss who among attorneys, paralegal, interns, clerical support, students, etc. will provide which services and whether these persons will be full time or part time. What will be the regular hours of operation?

3. CLIENT INTAKE METHODS - Briefly describe the client intake process at the legal service office and at intake/outreach sites. Address whether standardized intake forms will be used and if the intake process is done on a "face to face" basis. Please describe how and who conducts the intake interview. Include in the description, the hours of intake and how potential clients are made aware of these specialized hours, if they differ from regular office hours. How will potential clients be notified of the availability of legal assistance? This description should detail the notification process that is to be used for each of the target populations. What is the specific plan for reaching the potentially eligible homebound?

4. COORDINATION & COUNTY COVERAGE - If you are not a Legal Services Corporation (LSC) grantee, describe how you will coordinate your efforts with the program in your area should you operate this Elderly Legal Assistance Program (ELAP). Regardless of whether you are an LSC grantee, discuss your coordination procedures with other ELAP providers if your client should have a legal problem outside of your planning and service area. How often does the provider conduct intake in each county of the planning and service area? Are there any counties in which legal assistance (intake or community education) is not provided? If so, how are seniors afforded an opportunity to access legal assistance? Describe any factors, which limit the ability of this provider to fully serve clients in every county, such as geographic location, subject matter of certain priorities or lack of access to an attorney.

5. METHOD OF CASE ACCEPTANCE - Describe the method by which the ELAP decides which cases to accept and which to reject. If a case acceptance meeting method is used, describe how often the meetings are held, with whom, and who makes the ultimate decision as to whether a case should be handled. Discuss how the case acceptance for Older Americans Act Title IIIB cases is or would be different or similar to case acceptance for cases normally addressed by your office, organization or practice.

6. METHOD OF ATTORNEY SUPERVISION - Describe whether supervising attorneys for paralegals and staff attorneys are available on a regular or as-needed basis. Discuss whether contact between the supervising attorney and supervisees is made in person or by phone; whether and how often the supervising attorney is present during the client intake process; and,
whether the supervising attorney reviews all advice given to a client or just the advice about which the provider thinks supervising attorney review is necessary. Discuss the situations that are normally subject to supervisory review and any specific time parameters. (i.e. all actions by a staff attorney during his/her first 3, 6, 9 (?) months of employment) Please provide the name and business address of the attorney who is responsible for supervision.

6. ATTORNEYS NOT LICENSED IN GEORGIA - If the direct providers of legal assistance are attorneys but are not licensed to practice in Georgia, discuss the method by which they are supervised by a Georgia licensed attorney. Discuss how clients with problems requiring the expertise of an attorney are handled in these specific situations.

7. ATTORNEY AND NON-ATTORNEY SERVICE DELIVERY – Discuss the timeframes for the client actually having access to the attorney and what types of information, legal assistance or other matters are provided by the non-attorney. In what instances or under what circumstances does the non-attorney provide legal assistance to clients without first discussing the issue with the supervising attorney?

8. METHOD OF CASE REFERRAL - Discuss how clients are referred to pro bono or reduced fee assistance programs. Does ELAP staff conduct follow-up for quality assurance purposes? If so, detail the follow-up process utilized.

9. METHOD FOR IDENTIFYING AND RESOLVING CONFLICTS OF INTEREST
   Describe each system and/or safeguard in place to identify and resolve conflicts of interest (e.g., adverse party files, review of outside employment by ELAP staff, possibility of opposing counsel in the same office, etc.)

10. DESCRIPTION OF QUALITY ASSURANCE SYSTEMS - Describe any office or organizational quality control systems in place or under development. This discussion may include details of case reviews, case limitations, internal monitoring, programmatic and/or fiscal audits or other systems in place to ensure quality services are being provided.

B. CASE PRIORITIES

1. METHOD OF SERVING CLIENTS IN THE TARGET POPULATIONS: GREATEST SOCIAL OR ECONOMIC NEED, RURAL AND LOW-INCOME MINORITIES, LIMITED ENGLISH PROFICIENCY - Describe systems for meeting needs of clients in the target population. Include in the discussion, in what way(s) your office, practice or organization would factor in the fact that a potential client has neither a social or economic need when considering whether or not to provide services to them.

2. RANKING OF CASE PRIORITIES - Describe any particular system of ranking that you may have prescribed or plan to prescribe to the mandated priorities. If you have no such system, indicate whether or not you have elected to handle all cases on a first come, first served basis. Discuss any systems of preferences utilized and their correlation to and potential affect upon the types of cases accepted or potential clients. What changes have you implemented, if any, to balance the requests for the preparation of Last Will and Testaments with the restrictions on the number of Last Will and Testaments that may be prepared in a fiscal year?
3. **PROCEDURE FOR TREATMENT OF POTENTIAL CLIENTS WHO'S CASES FALL OUTSIDE OF CASE PRIORITIES LISTING** - Describe how potential clients are to be handled if their case falls outside of priority listing or cannot be handled by the program. Include in this discussion, how individuals are or will be informed of this determination and what if any advice or assistance is or will be provided.

4. **INABILITY TO HANDLE CERTAIN CASE PRIORITIES** - Discuss your office, program, organization or practice’s inability to handle certain case priorities and/or inability to handle certain case priorities in the manner prescribed by the program, including but not limited to defense of guardianship, assistance to grandparents raising grandchildren, Miller’s Trusts, nursing home discharge, etc. Indicate upon what your inability is based (i.e. inexperience, lack of staff, disagreement that the case type should be handled by ELAP, conflict with other funding sources, etc.). Discuss what provisions you will implement or have in place that will assure potential clients still have access to legal assistance.

5. **OUTREACH**

   a. Describe the capacity and method for effective outreach and assistance to institutionalized, isolated and homebound individuals. (Incumbent Providers Only)
   
   b. Discuss previously used methods of outreach and substantiate an assessment of their utility, benefit and an indication of whether any of the methods used are recommended for replication by other providers in other planning and service areas.
   
   c. Discuss any coalitions, teams, task forces, community groups or other entities with which the provider has partnered and relate any beneficial experiences realized.
   
   d. Discuss in detail any method of outreach that the provider would like to utilize but is unable to for some reason.

C. **DESCRIPTION OF TRAINING REQUESTED BY THE LEGAL ASSISTANCE PROVIDER**

1. (For Incumbent Providers Only) Indicate the last year that the provider’s staff attended a training/conference provided by the Division of Aging Services for ELAP.

2. **TRAINING** - Briefly describe any anticipated legal training needs of the ELAP provider for the coming year. Discuss in what particular substantive or skill areas training is needed or desired and how it not having that training is currently impacting staff in their ability to provide quality legal services to clients.

D. **DESCRIPTION OF COORDINATION WITH OTHER ELDER RIGHTS SYSTEM PROGRAMS**

1. **LTCO** - Briefly describe the capacity and method for providing legal backup to the Long-Term Care Ombudsman program in your planning and service area. Include in the description whether or not there are regular meetings with LTCO; a set referral process; a process for apprising LTCO whether or not a referral has been accepted, denied and/or acted upon; a time frame for acting upon a referral from LTCO; opportunities for joint training or projects with LTCO; or whether a legal worker within your program has been appointed with whom LTCO can always reach and discuss a case.
2. GeorgiaCares - Briefly describe the capacity and method for providing legal support to the GeorgiaCares program in your planning and service area. Describe the process by which GeorgiaCares volunteers can make referrals. Describe any plans for ongoing interaction with the GeorgiaCares program.

3. Elder Abuse Prevention – If you are not the elder abuse prevention provider, discuss how backup and support will be provided to the elder abuse prevention provider. If you are the elder abuse prevention provider, indicate how you will ensure that there will be no supplanting or duplicating of services.

4. Adult Protective Services – Discuss your plan to coordinate with Adult Protective Services (APS). Include any initiatives planned to increase awareness and understanding between the two programs with a specific focus on the legal needs of “wards” of APS.

E. DESCRIPTION OF NON-ENGLISH SPEAKING ELDERLY

1. ASSISTANCE TO NON-ENGLISH SPEAKING - Describe capacity and method for providing legal assistance for clients in your service area who do not speak English as their principal language. Add in this description, the way the public is made aware of this assistance.

F. FEE GENERATING CASE

1. EMERGENCY SITUATION - Describe the method for identifying whether adequate representation is unavailable, or an emergency situation exists which requires immediate action in a fee generating case as defined by 45 CFR Section 1321.71 (g) (1). Describe screening and intake processes regarding this requirement.

2. REFERRAL - Describe how referrals for fee generating cases are made. List types and numbers of referral attorneys provided to clients. On what basis are the referrals selected to provide to persons presenting fee-generating cases? Are those persons to whom referrals are given invited or instructed to return to the provider if their case is rejected by all the referrals?

G. COMPLIANCE WITH STANDARDS

1. Discuss any inability to comply with the Georgia Elderly Legal Assistance Program Standards. Cite the section and paragraph or specific requirement that cannot or will not be met. Discuss how this has been brought to the attention of the State Legal Services Developer and/or the River Valley Area Agency on Aging.

2. Discuss any inability to meet or comply with the reporting requirements of the Georgia Elderly Legal Assistance Program. Identify who is responsible for completing the Quarterly Narrative Report, entering data in AIMS and ensuring the accuracy of the data reported.

3. Discuss any subcontractor agreements in place for another entity to provide services to any counties or areas within the planning and service area that you are serving. If you believe that you would only be able to serve a planning and service area with the assistance of another entity, detail that need. If arrangements have been made with another office, individual,
program or entity to assist with providing legal services under the ELAP contract, detail those arrangements and explain why they should not be reflected in a subcontractor agreement as required by the Georgia ELAP Standards.

H. **STAFFING PATTERN**

1. Include a staffing pattern for the proposed Elderly Legal Assistance Program. Complete a table that includes names, titles, and percentages of time devoted to the program. Detail the roles and responsibilities of each staff member. This should include assignments to certain counties, case types or subject matter.

I. **SAVINGS AND BENEFITS HISTORY**

1. (For Incumbent Providers Only) What is the dollar amount of previous fiscal years savings and benefits to clients served by case representation? Include worksheet indicating how this figure was derived for specific case type categories.

J. **FUNDING**

1. (For Incumbent Providers Only) Has there been an increase or decrease in funding received to provide services in the past fiscal year? Provide details on this funding change and how it affected program.

2. Based upon your plan to provide services, how much of the services will the current level of funding provide?

3. How much additional funding would be required to increase services in all areas (legal information, community education and case representation) by 20%?

K. **CLIENT SATISFACTION**

1. What method is used, or do you plan to use to measure client satisfaction and what elements of legal services do you expect to measure?

L. **UNMET NEED**

1. To what extent does the provider have the capacity to track the numbers of persons who must be denied services because of the ELAP provider’s inability to meet their needs?
APPENDIX A – 4 – HOME AND COMMUNITY BASED SERVICES – SCOPE OF SERVICES

A. **Purpose of Procurement**
   The River Valley Area Agency is requesting proposals from qualified offerors capable of providing Home and Community Based Services to include homemaker aide, personal care aide, in-home respite, and respite voucher program.

   The successful offeror will provide homemaker aide, personal care aide, in-home respite, and respite voucher program.

   **Program Legislation, Regulation, Program Standards and/or Guidelines:**
   - Administration on Aging web page for Older Americans Act ([http://www.aoa.gov/about/legbudg/oaa/OAA-compilation-unofficial.pdf](http://www.aoa.gov/about/legbudg/oaa/OAA-compilation-unofficial.pdf))
   - DHS/DAS HCBS Manual (web page available at [http://aging.DHS.gov](http://aging.DHS.gov) and look under Publications – HCBS) and other rules, regulations, standards and transmittals promulgated by the State of Georgia and the Area Agency on Aging program directives.

B. **Program Description** - Offeror to describe fully the method of provision for Home and Community Based Services:
   - Detail how the specific service or services will be provided.
   - Describe how priority for services to clients will be determined.
   - Indicate if all counties in AAA will be covered.
   - Indicate the target population that will receive services.

C. **Capacity** - Outline offeror’s background and capacity to provide this service effectively.
   Address sustainability and the qualifications of Offeror’s organization and staff to provide services as proposed.
   - Describe how the Offeror will interface with the River Valley Area Agency on Aging and/or Division of Aging Services to resolve issues effectively related to service delivery and clients.
   - Discuss the qualifications and capability to provide effective services that will meet all program standards.
   - Organizational chart demonstrates effective lines of communication and program responsibility, and detail percent of staff time assigned to each service or program.
   - State when (days and hours of operation) and where services will be provided, and if alternate delivery sites are used, identify each site and days and hours of operation.

D. **Information and Referral**
   - Describe how Offeror will interface with the River Valley Area Agency on Aging (AAA) Gateway/ADRC Information and Assistance and their management of the waiting list.
   - Describe how Offeror will handle clients that contact the agency directly.
   - Describe how Offeror will follow up on referrals made to other agencies.
   - Describe how Offeror will know that the client received the information requested.

E. **Service Plan for Individual Services**
   - Describe individual client service admission and discharge policies, procedures and criteria.
   - Describe how individualized service plans are designed for each person receiving HCBS services.
REQUEST FOR PROPOSAL (RFP)
Fiscal Years 2021-2025

- Describe how the Offeror will resolve client issues effectively and timely.

F. Special Initiatives or Collaborations:
- Describe any special initiatives, innovations that will enhance Offeror’s program in the community.
- Describe any new or on-going plans to obtain additional financial support or resources for this program.
- Describe any partnerships or collaborations with other community organizations or private businesses that will strengthen the services provided by Offeror.

G. Outreach or Marketing Plan
- Describe the program awareness activities or marketing plan for agency.
- Describe the methods Offeror will use to provide outreach to persons in the community as well as minorities, homebound or otherwise isolated individuals.
- Describe any special materials or techniques Offeror has developed to reach special populations.
- Describe any specific populations Offeror will target, if any.
- Describe methods to be used to provide services to Limited English Proficiency/Sensory Impaired (LEP/SI) clients.

H. Professional and/or Volunteer Development
- Describe how Offeror will provide new staff orientation and training and provide an outline of the orientation schedule and topics.
- Describe Offeror’s plan for conducting on-going staff training including topics and number of training sessions to be held.
- Describe method Offeror will use to determine the training needs of staff and/or volunteers.
- Describe the agency’s staff recruiting practices and retention strategies. Indicate the annual staff turnover rate from the most recent fiscal year.

I. Client Confidentiality and Contributions
- Describe policy or procedures concerning client confidentiality.
- Describe process for soliciting and handling client contributions toward the cost of the services and/or fees. Describe how Offeror will account for cash contributions. Describe the billing procedures for fees. Attach copies of any materials used to solicit fees.
J. Technology and Ability to Meet Reporting Requirements
   - Describe agency’s capacity for and use of technology, both in agency administration and delivering services.
   - Describe agency’s strategic plan for maintaining adequate stock including hardware, software and voice/data services.
   - Indicate capacity or plan to interface with the Division of Aging Services Aging Information Management System (AIMS) for reporting.
   - Detail person(s) responsible for data validation, data entry and reporting.

K. Quality Assurance Program or Plan:
   - Describe how Offeror will ensure the quality of the program or services to clients.
   - Describe how Offeror will measure the effectiveness of your program.
   - Describe how Offeror will determine if the program had an impact on the clients.
   - Describe how Offeror will determine the client’s satisfaction with services.

APPENDIX A-5 - SENIOR CENTER RECREATION

a. Purpose of Procurement

The River Valley Area Agency on Aging is seeking proposals from qualified offerors capable of providing Senior Center Recreation. *There are twelve (12) senior centers located in twelve (12) of the sixteen (16) counties that we serve. All senior centers are open five days a week for a minimum of 4 hours per day. (See Appendices)*

The Division of Aging Services has implemented Senior Center Redesign. (See Section 206 – Senior Center Requirements) as listed in the Program Standards and/or Guidelines. The River Valley Regional Commission Area Agency on Agency recommends that offerors use one of the senior center models listed below:

Traditional Senior Center: A community focal point where older adults come together for services and activities that reflect their experience and skills, respond to their diverse needs and interests, enhance their dignity, support their independence, and encourage their involvement in and with the center and the community.

Collaborative-Style Center: An identified natural gathering place for older adults who have the same minimum services and programs as a senior center, but without a center manager. Services and programs are organized by volunteers.

Center Without Walls: A community-based option for participants to access programs and services outside of a traditional senior center. All activities, including meals, occur in the community.

Senior Centers will provide a broad spectrum of group and individual activities which reflect the needs and interests of the participants and other older persons in the designated service area.
Georgia Division of Aging Services Senior Center Requirements state that a “minimum of one (1) hour of planned activities per day, in addition to any nutrition education services, must be provided.

Each center must serve an average of at least twenty (20) participants per day, based on the average number of meals served per day during any given month, considering all meals served through all fund sources. Centers are encouraged to provide activities and services to attract older adults of all interest levels, not just older adults wishing to consume a congregate meal. Participant(s) may also choose to private pay the cost of the meal, should said participant(s) not wish to be assessed and placed on the River Valley Area Agency on Aging’s waiting list for services funded through the Older Americans Act and other applicable funding sources.

Nutrition education must be provided at least once each month to all senior center/congregate meal participants.

Outreach must be done throughout the service area to identify and refer older adults requiring services to the River Valley Area Agency on Aging for assessment.

Offeror’s must maintain and update client records, including administering the NSI-D checklist, for each program participant and reassessing need for service annually or when the client condition changes.

Offeror’s must complete program monitoring and evaluation (i.e. customer satisfaction).

Each senior center must be a meal site for a congregate nutrition program.

Each senior center shall provide directly or make arrangements for the provision of the following services: Socialization/Recreation; Outreach; Information and Referral; Volunteer Opportunities, etc.

Each senior center must DOCUMENT that it is in compliance with fire safety standards and applicable Georgia and local public health codes regulating to food service establishments.

Each senior center must document that appropriate preparation has taken place for procedures to be followed in case of an emergency including:

e) an annual fire drill;

b) posting of procedures and training of staff and regular volunteers on procedures to be followed in the event of severe weather or a natural disaster; and

c) posting of procedures and training of staff and regular volunteers on procedures to be followed in the event of a medical emergency.

1. Each senior center must provide an opportunity for center participants to have input regarding the governance of the center in in daily operations.
APPENDIX A-6 MENU PLANNING SERVICES

Describe how you will develop a four-week cycle menu (regular and special diets) which will change quarterly. Provide copies of a four-week cycle menu (regular and special diets). Also, include Holiday menus separately. Also include samples of choice menu items for clients in the four-week cycle.

Describe how you will develop (or coordinate the development of) menus considering input from program participants and nutrition service providers. The dietitian may get this information through quarterly menu-planning meetings with senior center managers and on-site kitchen staff and quarterly meal evaluation forms.

Describe how you will assure that the menus conform to the Division of Aging Services Standards for Nutrition Services.

Describe how you will provide a copy of the quarterly menus and provide standardized recipes as needed and appropriate. A nutrient analysis for each meal served per menu cycle should be available.

Training and Monitoring:

Describe how you will conduct quarterly in-service training to on-site kitchen staff and senior center staff on such topics as food sanitation and safety; portion control; quality control; cost control; special nutritional needs of the elderly; planning low-cost, nutritious meals for one or two people; other health related topics.

Describe how you will develop and/or disseminate approved nutrition education materials to food service personnel (for use with kitchen staff) and to senior center managers.

Describe how you will promptly send to AAA menus planned at the quarterly meetings, the sign-in sheet for the quarterly meetings and copies of nutritional education hand-outs distributed in meeting.

Describe how you will monitor all Food Kitchens where food is prepared on-site at least once annually and perform follow-ups in deficiencies as needed. Reports of finding and follow-ups must be furnished to the AAA.

Please provide a four-week cycle of proposed menus for clients (Spring, Summer, Fall, Winter and Holiday) to include menu choice.

Describe how you will develop and disseminate approved nutrition education materials to be used for Congregate and Home Delivered Meals participants on a monthly basis. (A twelve-month list of materials can be distributed on an annual basis or distributed on a monthly basis to Site Managers for distribution to clients.)
REQUEST FOR PROPOSAL (RFP)
Fiscal Years 2021-2025

Describe how you will provide technical assistance in the areas of food management and nutrition program management to Area Agency Staff, Food Service Personnel, and Site Managers.