REQUEST FOR PROPOSAL
FOR THE
Elderly Legal Assistance Program (ELAP)

Coastal Regional Commission
OF GEORGIA
AREA AGENCY ON AGING

RFP # 2017-05

For all questions about this RFP contact:

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Released On:
Monday, October 26, 2015

Due On:
12:00 p.m. Eastern Time on Friday, December 4, 2015

1. **INTRODUCTION**
    a) Purpose of Procurement Process
    b) AAA Vision, Mission, and Values
    c) Schedule of Events
    d) Restrictions on Communication with Staff
    e) Definition of Terms
    f) Contract Terms

2. **MANDATORY REQUIREMENTS**
    a) Offeror's Qualification Requirements
    b) Business Requirements
    c) Mandatory Submission Requirements
    d) Budget Requirements
    e) Hardware/Software Equipment Requirements

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

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

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) Evaluation Criteria Considered for All Current or Past AAA Providers
    e) Identification of Apparent Successful Offeror
    f) Rejection of Proposals/Cancellation of RFP

9. **APPENDICES**
    a) Scope of Services for the **Elderly Legal Assistance Program**
    b) Sample Contract
    c) CRC Anti-Fraud Policy
    d) Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion **–** To be signed and submitted with the proposal packet.
    e) Certification Regarding Lobbying - To be signed and submitted with the proposal packet.
    f) Health Insurance Portability and Accountability Business Associate Agreement **–** To be signed and submitted with the proposal packet.
    g) Revenue Plan, Units/Persons and Cost Chart – To be completed and submitted with the written proposal and electronically on a CD or USB drive
    h) Division of Aging Services - Fund Sources (SFY 2016-01) – Provided for reference.
    i) Uniform Cost Methodology – Contains instruction and the appropriate spreadsheet for Offeror to complete; a requirement for the Budget Proposal
    j) Proposal Checklist **–** To be completed and included in the proposal packet immediately following the Offeror’s Letter of Transmittal.
    k) Proposal Face Sheet – To be completed and included as the first page of each proposal being submitted.
    l) Blank SMART Objectives Form & Instructions

1. INTRODUCTION

The Coastal Regional Commission (CRC) as the Area Agency on Aging (AAA) is soliciting proposals from Offerors interested in providing the **Elderly Legal Assistance Program (ELAP).** Offerors must operate ELAP in all nine counties in PSA 12. Successful Offeror(s) will become a part of the service delivery system detailed in AAA's State Fiscal Year 2017-2020 Area Plan, which runs from July 1, 2016 to June 30, 2020. Offerors must complete this RFP to be considered.

a) ***Purpose of Procurement Process***

The Georgia Department of Human Services, Division of Aging Services has designated CRC as the Area Agency on Aging for the nine county Coastal region. As such, CRC receives funds through the Older Americans Act (Title III B, C1, C2, & E, and Title VII); the Social Services Block Grant (SSBG); the Community Care Services Program (CCSP); the Community Based Services (CBS) Program (a cost share program), Income Tax Check-off, Alzheimer's Grants, and, other fund sources to ensure that a comprehensive and coordinated service delivery system for older persons and their caregivers is available. CRC has the responsibility for developing an Area Plan (available online at http://www.crc.ga.gov/publications/aaa/Coastal%20AAA%20Area%20Plan.pdf) for aging services and programs which describes this service delivery system in detail and the impact the Area Plan has on older residents in the planning and service area. The Area Plan is implemented through contracts negotiated with providers to implement services for the benefit of older residents and their families/caregivers in the Coastal region. For more information related to the Older Americans Act go to: http://www.aoa.gov/AoA_programs/OAA/.

The aging programs solicited through this RFP shall be operated to assist older adults to achieve healthy, independent, and self-sufficient lives to the extent possible and to provide information and support to their family caregivers. This will be accomplished by providing a coordinated system of community services so older persons may remain independent as long as possible. Providers are to design a client focused program with a commitment to continuous improvement in the quality of services based on the outcome measures and standards as detailed for each program and service.

Program Legislation, Regulation, Program Standards and/or Guidelines:
The successful offeror will provide legal services in PSA 12 in accordance with the Older Americans Act and the 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. The ELAP Standards are available in the **Access to Services Manual 5400**, Chapter 2000 Elderly Legal Assistance Program on the ODIS website: http://odis.dhs.ga.gov/ChooseCategory.aspx?cid=811
Please see the Administration on Aging web page for Information about the Older Americans Act, http://www.aoa.gov/AOA_programs/OAA/oaa_full.asp

The CRC/AAA has the right to reject any and all proposals. Contracts will be awarded based on a careful objective review and evaluation process.

a) ***AAA Vision, Mission, and Values***

Vision - "All seniors, persons with disabilities, and family caregivers residing in Coastal Georgia will have access to information and services that promote physical health, mental well-being and options for living that ensure personal dignity and individual choice."

Mission - "The mission of the Coastal Georgia Area Agency on Aging is to foster the development and implementation of a comprehensive, coordinated system of services to promote the independence and continued well-being of coastal area older adults and those with disabilities, and to provide these individuals and their caregivers with information and access to these services."

Values

- **Respect** for seniors, persons with disabilities, caregivers, and our partners who serve them.
- **Creativity and a will to succeed** among our staff and our partners to capitalize on the unique qualities of our region.
- **Integrity and responsiveness** in our relationships with consumers and providers to ensure quality services are delivered timely, appropriately and in a cost-effective manner.
- **Innovation** to create opportunities that maximize the strengths, talents, knowledge and resources of our region's older residents as they age positively.
- **Accountability** to our consumers, service network of providers, and the Aging Services leadership in Georgia.

b) ***Overview of the RFP Process –*** The objective of this RFP is to select one (or more) qualified Offerors (as defined by Section - "Purpose of Procurement" to provide the services as outlined in the RFP to the Area Agency on Aging. This RFP process will be 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 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.

c) ***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.

Description	***Specific Date***	***Time (Eastern Standard)***
Public Hearings: *Savannah – Armstrong Center* *Richmond Hill – Richmond Hill City Center* *Brunswick – Glynn County Library* *Statesboro – Honey Bowen Building*	 *Tues., November 10, 2015* *Tues., November 17, 2015* *Tues., December 1, 2015* *Thur., December 3, 2015*	 *All hearings will be:* *10 AM – 12 noon*
Release of RFP	*October 26, 2015*	*5:00 PM*
Bidder's Conference ***Uniform Cost Methodology Training*** *Coastal Regional Commission,* *1181 Coastal Drive SW, Darien, GA 31305* *912-437-0800*	*November 12, 2015* *November 12, 2015*	*10 AM – 12noon* *12 noon – 2 PM*
Deadline for written questions sent via e-mail to Aging Services Director (dlovett@crc.ga.gov) *Subject line must read:* ***RFP QUESTION***	*November 19, 2015*	*12 noon*
Responses to written questions posted on CRC website	*November 20, 2015*	*5:00 PM*
Proposals Due/Close Date & Time	*December 4, 2015*	*12:00 PM*
Notice of Award (on or about)	*January 8, 2016*	

d) ***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 CRC/AAA staff, except through the Aging Services (AAA) Director named herein, or during the Offeror's conference, or as provided by existing work agreement(s). The CRC/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 AAA Director. No questions will be accepted except in written format. Only written responses will be binding upon the CRC/AAA.

e) ***Definition of Terms***

Administration on Aging (AoA): the federal agency within the U.S. Department of Health and Human Services responsible for the implementation of all services, programs, and provisions as outlined in the Older Americans Act and its amendments.

Area Agency on Aging (AAA): the regional entity designated by the Georgia Department of Human Services Division of Aging Services to carry out services and programs under their contracts and agreements with the U.S. Administration on Aging. The Coastal Georgia Region is comprised of the following nine counties: Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, and McIntosh.

Notice of Award: Official written communication from the Coastal AAA to the successful bidder(s) for the provision of one or more services. Notification will be made on or about January 8, 2016.

Service Area: All the land area within the incorporated boundaries of any given county in the Coastal Georgia region.

Uniform Cost Methodology: A detailed analysis of all costs associated with delivering services and/or goods which ensures that per unit costs are evaluated on a consistent basis.

f) ***Contract Terms*** - All contracts are awarded on a State of Georgia fiscal year (SFY) basis (July 1 – June 30). Contracts with successful bidder(s) will begin July 1, 2016. The contract will have options to renew annually between July 1, 2016 – June 30, 2020, for 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.

2. MANDATORY REQUIREMENTS

This section identifies all mandatory requirements which must be present in the proposal before further consideration will be given.

a) ***Offeror's Qualification Requirements*** - Offeror must have a minimum of three (3) years experience providing the service(s) being proposed or similar service (s).

b) ***Business Requirements*** - The Offeror must provide documentation verifying current business and operating licenses, proof of bonding, and insurance coverage required by law to carry out the service(s) being proposed.

c) ***Mandatory Submission Requirements*** – Offeror must complete all sections of the Request for Proposal, including the Technical and Budget Proposals for each service being proposed. All documents must be labeled as instructed and submitted by the date and time specified.

d) ***Budget Requirements*** – Funding allocation and budget forms can be found in appendices of this document or may be downloaded from the AAA website. Offeror must submit a narrative that addresses costs and/or revenue and persons/units served. Must have completed the UCM spreadsheet (either short form or long form).

e) ***Hardware/Software Equipment Requirements*** - Listed below are the minimum specifications for equipment, the operating systems, and software required for providers to use the Uniform Cost Methodology (UCM) and to comply with the recording requirements of the Division of Aging Services Aging Information Management System (AIMS):

PC Workstation:

- Intel Core i3, 500 GB Hard Drive (or better)
- 4 GB RAM (or higher)
- 17 " LCD Monitor
- Network card to support DSL or other high-speed Internet connection
- Good quality laser printer
- Keyboard
- Mouse
- Windows 7 Professional or higher Operating System (Must maintain updated versions and all patches for operating system.)

Connectivity: The Offeror ***must have the ability to connect to the Internet and the AIMS server through digital Service Line*** or other high-speed Internet connection. The Offer ***must also have at least one email address designated for each service site and the ability to receive referrals in an electronic format.***

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.

   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 three (3) full consecutive years experience as a provider of the service(s) being proposed, or similar service(s). The 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 three (3) 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) Contract Amount
         g) 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. Offeror will provide details of its experience, minimum of three 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. The individuals identified as the "Contact Person" on your letters of recommendation must be current employees of the recommending organization and authorized to make recommendations on behalf of the organization.
3. Said 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 Appendices for Scope of Services for specific program or service that the Offeror is bidding on in this RFP.**

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 the 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.

5. PROPOSAL SUBMISSION

a) ***Packaging of Proposals*** **–** The Applicant's proposal in response to this RFP must be clearly labeled and sealed, with a face sheet (provided in Appendices). ***<u>Proposals will not be accepted electronically</u>***. The mailing envelope must clearly identify the Offeror's name, name of agency, and mailing address. Do not include cost information in the technical proposal.

b) ***Number of Proposal Copies*** **–**Submit one original document with signatures marked "original" and <u>three (3) hard copies of the original</u>. Include electronic copies as follows:
   - One CD or USB drive containing the Technical Proposal in Microsoft Word format (2003 or later version), labeled "Technical," with the Offeror's name and proposal number clearly marked.
   - One CD or USB drive containing all parts of the Budget Proposal in Microsoft Excel format (2003 or later version), labeled "Budget," with the Offeror's name and proposal number clearly marked.

c) ***Submission of Proposals***

   1. ***Issuing Office*** - The Coastal Regional Commission Area Agency on Aging issues this Request for Proposal (RFP). The Area Agency on Aging is the sole point of contact for this RFP and subsequent revisions.
   2. ***Rejection of Proposal***: The Coastal Regional Commission 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, Dionne Lovett, 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 the Director of the Area Agency, Dionne Lovett. The AAA will transmit to all responders all questions and the Area Agency's responses according to the Schedule of Events.
   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 three (3) hard 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. 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 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:
   1. The general scope of work to be performed by the subcontractor;
   2. The subcontractor's willingness to perform the work indicated; and
   3. 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 Area Agency on Aging and the Department of Human Services. 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 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 Area Agency on Aging's sole right to alter the time tables for procurements as set forth in the RFP.
14. A statement that all responses become the property of the Area Agency on Aging and will not be returned to the offeror. The 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 Area Agency on Aging.
17. A statement that no contact, direct or otherwise, has occurred with any employee of the 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 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 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 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 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 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 it 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. EVALUATION PROCESS

a) ***Administrative Review*** **–** The proposals will be reviewed by the designated staff for the following administrative requirements: 1) Mandatory Requirements/Technical Proposal and Budget Proposal submissions. 2) Proposal packaging and submission requirements are met. 3) The Technical Proposal is submitted separate from the Budget Proposal. 4) All documents requiring an original signature have been signed and are included.

Administrative Review – (No points assigned for this section. Either yes or no, and <u>if not available, then Technical Proposal or Budget Proposal will not be reviewed</u>.	
Mandatory Requirements /Technical Proposal	
Offeror meets all of the stated Qualification Requirements	**Yes or No**
Offeror meets all stated Business Requirements	**Yes or No**
Offeror submitted all stated Submission Requirements	**Yes or No**
Offeror meets budget requirements	**Yes or No**
Budget Proposal	
Budget Narrative Submitted	**Yes or No**
Revenue Plan and Units/Persons	**Yes or No**
Uniform Cost Methodology Spreadsheet Completed	**Yes or No**
Proposal Submission	
Proposals Packaged and Delivered according to Requirements	**Yes or No**
Correct # of Proposal and Copies Submitted	**Yes or No**

Proposals Submitted on/by time specified	**Yes or No**
Assurances	
Letter of Transmittal with assurances provided and signed	**Yes or No**
Appendix	
All required documents are provided and signed	**Yes or No**

b) ***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 formula is **70% for technical** and 30% for budget of a maximum of 1000 total combined points for evaluation process.*

Technical Proposal (Total points not to exceed 700 pts.)	**Maximum # of Points**
Offeror described Company Structure including; ☐ Submitted Organizational Chart ☐ Identified Business Organization ☐ Submitted Board of Directors and/or Advisory Board	25
Offeror has background and capacity to provide this service effectively	25
Offeror meets all preferred Experience requirements	25
Offeror has demonstrated Financial Stability and positive Cash Flow	25
Offeror has demonstrated ability to provide quality services	50
Offeror has sufficient qualified staff and supervision as demonstrated on the organizational chart to provide the service	25
Offerror has described special initiatives, innovations that will enhance ELAP in the community	25
Offeror has described effective program awareness activities and marketing plans.	25
Offeror has a staff plan and assigned staff time to each program appropriately	25
Offeror's days and hours of operation are sufficient to deliver services effectively	25
ELAP Narrative	
Description of Service Delivery Model	25
Case Priorities	25
Description of Training Requested by the Legal Assistance Provider	25
Description of Coordination	25
Description of Non-English Speaking	25
Fee Generating Cases	25
Compliance with Standards	25
Staffing Patterns	25
Savings and Benefits History	25
Funding	25
Client Satisfaction	25

Unmet Need	25
Performance Goals, Objectives, and Performance Measures	
Offeror linked to appropriate AoA or DAS or AAA Priorities (goals, mission, vision and values)	25
Offeror stated the a broad focus for a program goal	25
Offeror proposed appropriate objectives to be accomplished, and when completed, will move the agency toward the goal and date of completion	25
Offeror clearly defines the action steps, who is responsible and when it will be completed	25
Offeror clearly stated how the result will be measured and the mechanism to collect this data	25
Offeror provided a numeric target amount that will be achieved for each performance measure	25
TOTAL SCORE	700

c) ***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 formula is 70% for technical and* ***30% for budget*** *of a maximum of 1000 total combined points for evaluation process.*

Budget Proposal Evaluation (total not to exceed 300 pts.)	**Maximum # of Points**
Narrative	
Offeror provided a budget narrative that is clear and concise in describing the proposed budget	20
Uniform Cost Methodology	
Level of additional funding support for proposed services is adequate to meet the needs of the services proposed	50
Offeror completed the UCM spreadsheet accurately based on administrative review of spreadsheet.	30
Offeror has sufficient staff to meet the program requirements/service provision.	30
Offeror has documented Donated Personnel and Non-cash Match to support the proposed services.	10
Revenue Plan, Units/Persons	
Offeror accurately identified services, units of services and unit costs as reflected on UCM Spreadsheet.	15
Offeror demonstrates exemplary capacity to expand services.	15
Offeror identified the correct allowable amount of Federal or State funds and/or required local match, additional local funding, program income and fees as appropriate.	15
Total Budget equals total cost as represented on UCM Spreadsheet	20
Funding requested does not exceed allocated funding by fund source.	15
Offeror has a reasonable cost for the services provided and amount persons	80

projected to receive services.	
TOTAL POINTS	300

d) ***Evaluation Criteria Considered for All Current or Past AAA Providers*** **–** As part of its evaluation process, the AAA Review Team(s) will have access to contract performance information for current or previous AAA provider (within the past five years). This information will be factored into the total points allowed in the Technical Proposal Evaluation in **Section 3.5 Capacity**. This section will only be scored by AAA staff. Every "YES" response in this section will yield 10 points, for a total possible score of 50 points. The criteria that will be considered can be found in the table below.

Historically, has this Offeror:	
▪ Submitted all required documentation in a timely manner?	Yes or No
▪ Submitted required documentation completely and accurately?	Yes or No
▪ Provided services in accordance with DAS/AAA standards?	Yes or No
▪ Worked cooperatively with the AAA to resolve issues?	Yes or No
▪ Conducted client assessments and reassessments on schedule?	Yes or No

e) ***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.

f) ***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.

Unsuccessful bidders have the right to request reconsideration or appeal the award decision. Such requests must be made in writing not more than 10 days following the award announcement, and must be directed to the Aging Services Director at the CRC stating the specific nature of the appeal. Response to all appeals will be made in writing within 10 days of receipt.

9. **APPENDICES**

a) Scope of Services – Elderly Legal Assistance Program

b) Sample Contract

c) CRC Anti-Fraud Policy

d) Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion – To be signed and submitted with the proposal packet.

e) Certification Regarding Lobbying - To be signed and submitted with the proposal packet.

f) Health Insurance Portability and Accountability Business Associate Agreement – To be signed and submitted with the proposal packet.

g) Revenue Plan, Units/Persons and Cost Chart – To be completed and submitted with the written proposal and electronically on a CD or USB drive

h) Division of Aging Services - Fund Sources (SFY 2016-01) – Provided for reference.

i) Uniform Cost Methodology – Contains instruction and the appropriate spreadsheet for Offeror to complete; a requirement for the Budget Proposal

j) Proposal Checklist – To be completed and included in the proposal packet immediately following the Offeror's Letter of Transmittal.

k) Proposal Face Sheet – To be completed and included as the first page of each proposal being submitted.

l) Blank SMART Objectives Form & Instructions

APPENDIX 9.1 Scope of services for the Elderly Legal Assistance Program (ELAP)

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 a 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. a 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. <u>CASE PRIORITIES</u>

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 in your area.

3. 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 ASSISTANCE

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 manner in which 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 with regard to 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 of 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 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 actually 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?

f) ***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 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 demonstrate 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.

f) ***Information and Referral***

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

g) ***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.

h) ***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.

i) ***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.

j) ***Client Confidentiality***

- Describe policy or procedures concerning client confidentiality

k) ***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.

l) ***Quality Assurance Program or Plan:***

a. State your agency's broad goal for providing a comprehensive legal assistance program. Explain how your agency's services goals relate to the Administration for Community Living (ACL)/ Administration on Aging (AOA), the Division of Aging Services and the Coastal Area Agency on Aging priorities for service, mission, vision and values.
b. Discuss your plan to evaluate the effectiveness of the services that will be provided. Describe how the client's satisfaction with services will be determined. Include a sample of any instrument or survey that will be used.
c. Describe how and what initiatives and best practices will be implemented to increase staff productive and the quality of service delivery and to ensure continuous quality improvement.

m) **PERFORMANCE GOALS OBJECTIVES AND PERFORMANCE MEASURES**

Complete one chart for each goal for the Elderly Legal Assistance Program, Goals and objectives can include short term and/or long-term commitments. Follow the sample format in the grid provided below. Be sure to complete all sections of the grid. A blank grid is provided in attached Appendices.

(Chart with generic definitions and examples for service goals and objectives)

Goal 4 - Objective # 1	**Annual Performance Measure**	**Action Steps**	**Annual Update on Objective**
The objective should state what will be accomplished; when it will happen and why the outcome is needed.	Describe quantifiable annual performance measure that assures stated objective/outcome will be achieved. If this is the first year for measuring this objective, then state how baseline is calculated.	Describe realistic and specific action steps needed and state date to be completed and person responsible to accomplish this task (When and Who).	Brief update on the progress toward meeting this objective. Was it met or not met? What was the measurable outcome at the end of fiscal year? (Reported in next Area Plan)
Goal 4 - Objective # 1 SFY 2017	**SFY 2017**	**SFY 2017**	**SFY 2017**
Increase services to seniors who provide care for minor children in an effort to assist their relatives by	**Increase cases by 2% over the 2016 baseline for resolving issues successfully for grandparents or other senior family relatives.**	**1. Develop a plan for outreach to potential clients** **To be completed by: Staff name and expected date(s).**	**Example of Annual Update:** **(Completed in SFY 2018 Area Plan)** **There was only a 1%**

5% by 2020.	**<u>Calculation for baseline:</u>** **Successful resolution of cases/total cases = % of successful cases in SFY 2016** **These cases have resulted in clients seeing issues resolved and as a result their income, housing, benefits and/or safety has been secured or enhanced.**	**2. Develop an educational/publicity plan or protocol to disseminate to targeted groups.** **To be completed by: Staff name and expected date(s).** **3. Host public forums or education session to provide group info.** **To be completed by: Staff name and expected date(s)** **4. Designate point person to receive calls or act as issue specialist.** **To be completed by: Staff name and expected dates(s).** **5. Conduct targeted satisfaction survey on this issue to determine impact upon the lives of the clients served to determine if the performance measure set was achieved.** **To be completed by: staff name(s) and expected date(s)**	**increase in the number of cases successfully handled from the previous year. Reasons include:** **1. Funding cuts resulted in loss of staff and circuit riding ability to conduct targeted education and public forums.** **2. An uptake in consumer debt cases inhibited the increased focus towards this objective.**
Goal 4 - Objective # 1 **SFY 2018**	**SFY 2018**	**SFY 2018**	**SFY 2018**
Increase services to seniors who provide care for minor children in an effort to assist their relatives by 5% by 2020.	**Increase cases by 3% over the 2016 baseline for resolving issues successfully for grandparents or other senior family relatives.** **<u>Calculation for baseline:</u>** **Successful resolution of cases/total cases = % of successful cases in SFY 2016** **These cases have resulted in clients seeing issues resolved and as a result their income, housing, benefits and/or safety has been secured**	**1. Review plan for outreach to potential clients to determine if changes are needed.** **To be completed by: Staff name and expected date(s).** **2. Review existing educational/publicity plan or protocol that is currently disseminated to targeted groups to see if changes are needed.** **To be completed by: Staff name and expected date(s).** **3. Continue to host public forums or education session to provide group**	**Example of Annual Update:** **(Completed in SFY 2019 Area Plan)** **There was only a 0% increase in the number of cases successfully handled from the previous year. Reasons include:** **1. Additional funding cuts resulted in loss of staff and circuit riding ability to conduct targeted education and public forums.** **2. An uptake in consumer debt**

	or enhanced.	**info but evaluate the groups where these are held to see if these are the best venues and audiences.** **To be completed by: Staff name and expected date(s)** **4. If structure permits, evaluate the point person receiving calls or acting as issue specialist.** **To be completed by: Staff name and expected dates(s).** **5. Conduct targeted satisfaction survey on this issue to determine impact upon the lives of the clients served to determine if the performance measure set was achieved.** **To be completed by: staff name(s) and expected date(s)**	**cases inhibited the increased focus towards this objective.**
Goal 4 - Objective # 1 **SFY 2019**	**SFY 2019**	**SFY 2019**	**SFY 2019**
Increase services to seniors who provide care for minor children in an effort to assist their relatives by 5% by 2020.	**Increase cases by 4% over the 2016 baseline for resolving issues successfully for grandparents or other senior family relatives.** **<u>Calculation for baseline:</u>** **Successful resolution of cases/total cases = % of successful cases in SFY 2016** **These cases have resulted in clients seeing issues resolved and as a result their income, housing, benefits and/or safety has been secured or enhanced.**	**1. Review plan for outreach to potential clients to determine if changes are needed.** **To be completed by: Staff name and expected date(s).** **2. Review existing educational/publicity plan or protocol that is currently disseminated to targeted groups to see if changes are needed.** **To be completed by: Staff name and expected date(s).** **3. Continue to host public forums or education session to provide group info but evaluate the groups where these are held to see if these are the best venues and audiences.** **To be completed by: Staff**	**Example of Annual Update:** **(Completed in SFY 2020 Area Plan)** **There was only a 0% increase in the number of cases successfully handled from the previous year. Reasons include:** **1. Additional funding cuts resulted in loss of staff and circuit riding ability to conduct targeted education and public forums.** **2. An uptake in consumer debt cases inhibited the increased focus towards this objective.**

		name and expected date(s) 4. If structure permits, evaluate the point person receiving calls or acting as issue specialist. To be completed by: Staff name and expected dates(s). 5. Conduct targeted satisfaction survey on this issue to determine impact upon the lives of the clients served to determine if the performance measure set was achieved. To be completed by: staff name(s) and expected date(s)	
Goal 4 - Objective # 1 SFY 2020	**SFY 2020**	**SFY 2020**	**SFY 2020**
Increase services to seniors who provide care for minor children in an effort to assist their relatives by 5% by 2020.	**Increase cases by 5% over the 2016 baseline for resolving issues successfully for grandparents or other senior family relatives. <u>Calculation for baseline:</u> Successful resolution of cases/total cases = % of successful cases in SFY 2016 These cases have resulted in clients seeing issues resolved and as a result their income, housing, benefits and/or safety has been secured or enhanced.**	**1. Review plan for outreach to potential clients to determine if changes are needed. To be completed by: Staff name and expected date(s). 2. Review existing educational/publicity plan or protocol that is currently disseminated to targeted groups to see if changes are needed. To be completed by: Staff name and expected date(s). 3. Continue to host public forums or education session to provide group info but evaluate the groups where these are held to see if these are the best venues and audiences. To be completed by: 4. If structure permits, evaluate the point person receiving calls or acting as issue specialist. To be completed by: Staff**	**Example of Annual Update: (Completed in SFY 2021 Area Plan) This goal was discontinued because priorities had to be streamlined due to the funding situation. A new objective was devised to target consumer debt cases. Materials will only be mailed for information purposes and referrals to private attorneys and pro bono attorneys will be provided.**

		name and expected dates(s). **5. Conduct targeted satisfaction survey on this issue to determine impact upon the lives of the clients served to determine if the performance measure set was achieved. To be completed by: staff name(s) and expected date(s)**	