Request for Proposal

for

Home & Community Based Services
In-Home Services: Homemaker, Personal Care and Respite Services

RFP # **2017-02**

For all questions about this RFP contact:

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   l) Blank SMART Objectives Form & Instructions

1. INTRODUCTION

a) *Purpose of Procurement Process*

Through this Request for Proposal (RFP), the Coastal Regional Commission (CRC), in its capacity as the Area Agency on Aging (AAA), is soliciting proposals from potential Offerors interested in operating aging programs in one or more of the following counties: Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, and McIntosh from July 1, 2016 to June 30, 2020. Offerors must complete this RFP to be considered. CRC has the right to reject any and all proposals. If there is more than one qualified provider, contracts will be awarded based on a review and evaluation process by CRC. Selected providers will become a part of the service delivery system detailed in AAA's State Fiscal Year 2017-2020 Area Plan.

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.

b) *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.

c) ***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.

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.

Description	***Specific Date***	***Time (Eastern Standard)***
Public Hearings:		
Savannah – Armstrong Center	*Tues., November 10, 2015*	*All hearings will be:*
Richmond Hill – Richmond Hill City Center	*Tues., November 17, 2015*	*10 AM – 12 noon*
Brunswick – Glynn County Library	*Tues., December 1, 2015*	
Statesboro – Honey Bowen Building	*Thur., December 3, 2015*	
Release of RFP	*October 26, 2015*	*5:00 PM*

Description	***Specific Date***	***Time (Eastern Standard)***
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*	

e) ***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.

f) ***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.

g) ***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 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). ***Proposals will not be accepted electronically***. 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 three (3) hard copies of the original. 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:
   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 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 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) 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. If required documents are not provided, the Proposal will not be reviewed.	
2.0 Mandatory Requirements Satisfied	
▪ 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
▪ Offeror meets the hardware/software/internet requirements outlined.	Yes or No
4.0 Budget Proposal	
▪ Budget Narrative Submitted	Yes or No
▪ Revenue Plan and Units/Persons Served:	Yes or No
▪ Uniform Cost Methodology Spreadsheet Completed	Yes or No
5.0 Proposal Submission	

▪Proposals Packaged and Delivered according to Requirements	Yes or No
▪Correct # of Proposals Submitted	Yes or No
▪Proposals Submitted in a timely matter	Yes or No
6.0 Assurances	
▪Letter of Transmittal with assurances provided and signed	Yes or No
9.0 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 receive a score of not more than 700 points. This will account for 70% of the total score possible.

Section 3.0 Technical Proposal (Total points not to exceed 700 pts.)	Maximum # of Points
3.1 Offeror described Company Structure including: ▪ Submitted Organizational Chart ▪ Identified Business Organization ▪ Submitted Board of Directors and/or Advisory Board	25
3.2 Offeror meets all preferred Experience requirements	50
3.3 Offeror has demonstrated Financial Stability and positive Cash Flow	50
3.4 Offeror has adequately explained any Business Litigation over the past five years	25
3.5 Scope of Program and Services	
▪ Offeror demonstrates ability to serve multiple counties effectively (for all services being proposed EXCEPT for Congregate Meals).*	30
▪ Offeror has effectively described the method of provision of services	50
Capacity Historical Performance (for current or returning Offerors only, past performance will be considered). See Section 8.4 below.	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	50
▪ Offeror has a staff plan and assigned staff time to each program appropriately	45
▪ Offeror's days and hours of operation are sufficient to deliver services effectively	25
Plan of Service	
▪ Offeror's Plan for delivery of services indicates the ability to provide services effectively	
▪ Information and Referral	10
▪ Service Plan for Individual Services	10
▪ Special Initiatives, Collaborations, and fund-raising	20
▪ Outreach or Marketing Plan	10
▪ Professional Staff and Volunteer Development	20

▪ Client Confidentiality & Contributions	10
▪ Technology and Ability to Meet Reporting Requirements	10
▪ Quality Assurance Program	5
▪ Accreditation from Health or Human Services Accrediting Agency, or Accreditation from National Institute of Senior Centers (NISC)	5
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 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 they will be completed	25
▪ Offeror clearly stated how the result will be measured and the mechanism to collect this data	50
▪ The 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 receive a score of not more than 300 points. This will account for 30% of the total score possible.

Section 4.0 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	15

State funds and/or required local match, additional local funding, program income and fees as appropriate.	
▪ 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 unit cost for the # of services provided and persons projected to receive services.	80
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 regarding any application being submitted by a 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 Service for Home and Community Based Services – Adult Day Care & Mobile Adult Day Care

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 a) Scope of Services for In-Home Services: Homemaker, Personal Care and Respite Services

A. Purpose of Procurement

The Area Agency on Aging is requesting proposals from qualified offerors capable of providing one or more of the following in-home services in one or more of the nine counties in the Coastal Georgia region.

1. Homemaker services and related home management activities;
2. Personal care services
3. In-home respite care

These services are provided in the home to persons 60 years of age or older, who are functionally impaired in their ability to perform regular activities of daily living. Services are designed to capitalize on the client's remaining strengths, lessen the burden of impairment, or to lessen the caregiver's burden. The successful Offeror will:

1. Provide in-home service activities including but not limited to housekeeping and home management activities, meal preparation, escort assistance, chore/errand services, client education, assistance with personal grooming and health, and temporary substitute care.
2. Conduct client assessments and reassessments.
3. Conduct supervisory visits monitoring aides performance.
4. Develop and revise individualized service plans.
5. Maintain adequate staffing to manage

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

- Administration for Community Living (ACL)/ Administration on Aging (AOA) Older Americans Act: http://www.aoa.gov/AOA_programs/OAA/oaa_full.asp
- DHR/DAS General Service Requirements, HCBS Manual 5300 http://odis.dhs.ga.gov/Main/Default.aspx and other rules, regulations, standards and transmittals promulgated by the State of Georgia and the Area Agency on Aging program directives.
- DHR/DAS Individual Service Requirements, HCBS Manual 5300, Section §306 Homemaker Services, Section §308 Personal Care Services, and Section §310 Respite Care Services http://odis.dhs.ga.gov/Main/Default.aspx

C. 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.

D. 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 *(provided in Section 3.1)* 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.

E. 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.
- 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.

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

.

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 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.

J. 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.

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:

- State your agency's broad goal for providing a comprehensive in-home services 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.
- Discuss your plan to evaluate the effectiveness of the in-home 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.
- Describe how and what initiatives and best practices will be implemented to increase staff productivity and the quality of service delivery and to ensure continuous quality improvement.

M. Performance Goals, Objectives, and Performance Measures

List all goals, objectives, and performance measures for the service(s) being proposed. Follow the sample format in the grid provided below. Be sure to complete all sections of the grid. A blank grid is provided in Appendices.

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

Name of Service or Program: In Home Services Homemaker, Personal Care or Respite - Objective # 1

Goal 3 - 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 2017? (Reported in next Area Plan)
Goal 3 - Objective # 1 SFY 2017	**SFY 2017**	**SFY 2017**	**SFY 2017**
Increase customer/caregiver satisfaction with in home services by 2020 by 10% to assure services improve program participant's quality of live.	**Establish a baseline for customer satisfaction by surveying 25% of IN HOME SERVICES clients by June, 2017 to determine if clients were not satisfied, somewhat satisfied, satisfied, very satisfied or extremely satisfied with the services they received.**	**1. Provider will review and update customer satisfaction survey by September, 2016.** **2. 3. Surveys will be administered between February – March, 2017** **4. Provider will compile and report on the baseline data for SFY 2017**	**Example of Annual Update:** **In SFY 2017, of the 300 IN HOME SERVICES clients, 25% were surveyed. Of the 75 clients surveyed, 70% expressed very satisfied or extremely satisfied with the services they received.**
Goal 3 - Objective # 1 SFY 2018	**SFY 2018**	**SFY 2018**	**SFY 2018**
Increase customer/caregiver satisfaction with IN HOME SERVICES by 2020 by 10% to assure services improve program participant's quality of live.	**IN HOME SERVICES clients will increase customer satisfaction by 5% over established baseline in SFY 2017**	**1. Provider will follow-up with those clients who expressed not satisfied, somewhat satisfied with IN HOME SERVICES by September, 2017 to determine the root cause.** **2. Surveys will be administered between February-March, 2018.** **3. Provider will compile the report for**	**Example of Annual Update:** **In SFY 2018, 78% of clients expressed very satisfied or extremely satisfied with services they received.**

		SFY 2018 and determine the percentage of increase when compared to the baseline data by June 30, 2018.	
Goal 3 - Objective # 1 SFY 2019	**SFY 2019**	**SFY 2019**	**SFY 2019**
Increase customer/caregiver satisfaction with IN HOME SERVICES by 2020 by 10% to assure services improve program participant's quality of live.	**IN HOME SERVICES clients will increase customer satisfaction by 5% over established baseline in SFY 2017**	**1. Provider will follow-up to those clients who expressed not satisfied, somewhat satisfied with IN HOME SERVICES by September, 2018 to determine the root cause.** **2. Provider will meet with IN HOME SERVICES staff to address the quality issues by October, 2018.** **3. Surveys will be administered between February- March, 2019.** **5. Provider will compile the report for SFY 2019 and determine the percentage of increase when compared to the baseline data by June 30, 2019.**	**Example of Annual Update:** **In SFY 2019, 85% of clients expressed very satisfied or extremely satisfied with the services they received.**
Goal 3 - Objective # 1 SFY 2020	**SFY 2020**	**SFY 2020**	**SFY 2020**
Increase customer/caregiver satisfaction with IN HOME SERVICES by 2020 by 10% to assure services improve program participant's quality of live.	**90% of IN HOME SERVICES clients surveyed will indicate satisfaction with IN HOME SERVICES services rendered during 2020, an 10% increase over the baseline data collected**	**1. Provider will follow-up with those clients who expressed not satisfied, somewhat satisfied with services by September, 20119 to determine the root cause.**	**Example of Annual Update:** **In SFY 2020, 92% of clients expressed very satisfied or extremely satisfied for the IN HOME**

	in SFY 2017	**2. Provider will meet with IN HOME SERVICES staff to address the quality issues by October, 2019.** **3. Surveys will be administered between February- March, 2020.** **5. Provider will compile the report for SFY 2020 and determine the percentage of increase when compared to the baseline data by June 30, 2020.**	**SERVICES they received.**