



Aging SERVICES

INCLUDES TITLE III B SUPPORTIVE SERVICES – HOME MANAGEMENT,
PERSONAL CARE, ESCORT, AND RESPITE

TITLE III C HOME DELIVERED AND CONGREGATE MEALS,

IIIB SENIOR CENTER SERVICES – EDUCATION, HEALTH PROMOTION,
RECREATION, INFORMATION AND ASSISTANCE, OUTREACH, AND
TRANSPORTATION

REQUEST FOR PROPOSAL (RFP) **July 1, 2023 – June 30, 2026**

FOR SERVICES FUNDED UNDER TITLE III-B OF THE UNITED STATES
ADMINISTRATION FOR COMMUNITY LIVING (ACL), ADMINISTRATION ON
AGING (AOA), PURSUANT TO THE OLDER AMERICANS ACT
OF 1965, AS AMENDED IN 2016

Submission Deadline: June 21, 2023

Purchase Area Development District (PADD)
1002 Medical Center Dr.
Mayfield, KY 42066
Phone: (270) 247-7171
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**Serving the counties of Ballard, Calloway, Carlisle, Fulton, Graves,
Hickman, Marshall and McCracken**

Bidder's Meeting: June 14, 2023, 10:00 am Central Time.

The Bidder's Meeting will be held via zoom meeting. An inquiry period is open for all questions to registered vendors who attend the Bidder's Meeting. Registration and questions must be submitted to cissy.fox@purchaseadd.org We suggest two or more staff members register for each interested agency.

PURCHASE AREA DEVELOPMENT DISTRICT

1002 Medical Center Dr.

Mayfield, KY 42066

Phone: (270) 247-7171

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www.purchaseadd.org

REQUEST FOR PROPOSAL for Aging Services

Mission Statement: The Mission of the Purchase Area Development District is to improve the quality of life for the residents of the Purchase Area through planning, programs, and partnerships.

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I. INTRODUCTION AND STATEMENT OF PURPOSE

Purchase Area Development District (PADD) has been designated the Area Agency on Aging and Independent Living (AAAIL) in accordance with Administration for Community Living (ACL), Administration on Aging (AOA), pursuant to the Older American's Act of 1965 (amended 2016) and Regulations thereto. As the Area Agency on Aging and Independent Living (AAAIL), PADD is responsible for administering federal and state funded programs for the citizens of the Kentucky counties of Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall, and McCracken which comprise the PADD AAAIL service area. In this capacity, PADD will support a network of service providers whose mission is to establish and develop services for older adults throughout the Purchase region.

Additionally, 906 KAR 1:180 requires agencies providing personal care services to become certified according to standards to be set by the Cabinet for Health and Family Services.

PADD is seeking proposals from multiple organizations experienced and qualified to provide services for individuals aged 60 and over. The period in which services are to be performed is **July 1, 2023 – June 30, 2026**. PADD has the option to extend the provision of services for subsequent fiscal year(s) through the procurement period referenced below, contingent upon the availability of funding, satisfactory performance of services, compliance with the provisions of the awarded contract and mutual agreement by both parties. PADD reserves the right to extend the procurement period as necessary to ensure the continuous delivery of services for seniors in its region. PADD will give priority to low-income minority seniors in the delivery of its services. Applicants must meet the minimum requirements and complete the proposal document in its entirety, with submission of the documents as requested, to be eligible for consideration of funding. PADD anticipates selecting one or more vendors to provide the necessary products that will help support the safety and welfare of the older adults served.

Procurement Period: FY2023 – FY2026

Fiscal Year	Period of Contracts
FY2024	July 1, 2023 – June 30, 2024
FY2025	July 1, 2024 – June 30, 2025
FY2026	July 1, 2025 – June 30, 2026

PADD is issuing this Request for Proposal for the following services:

- Title III B In home services
 - Homemaker Services
 - Chore Services
 - Escort
 - Personal Care
 - Respite

Title III B Supportive Services

- Education
- Transportation
- Health Promotion
- Information and Assistance
- Outreach
- Recreation
- Telephone Reassurance

Title III C

- Title III C-1 Congregate meals
- Title III C-2 Home delivered meals

PADD allocates the funds it receives for Aging services for the direct services to clients through a network of providers established through the procurement process. Successful applicants will be expected to offer a high-quality service and carry out the services as represented in the proposal while meeting expected outcomes. PADD reserves the right to negotiate with eligible applicants regarding the scope of work, service area, budget, and special provisions. All applicants eligible for consideration and meeting specified standards for a successful proposal will be given equal opportunity for negotiation. PADD reserves the right to accept or reject any or all proposals meeting minimum requirements for consideration. In the event a modification occurs after the bidder's meeting, only those entities who signed in at the bidder's meeting or recorded on the call-in bidder's meeting will receive the final addendum, if applicable.

Applicants will be required to support these programs with the following minimum match: Title III-B Federal Funds require a minimum **15%** match (In-Home Services) match. Match may be cash (agency non-federal resources) to support the cost of services or in-kind which would be the value of donated space, volunteer time for legal services or other allowable, PADD approved, in-kind resources to support the cost of conducting business as described in this RFP.

To be allowable, match must be provided through non-federal sources, used to conduct allowable services, may not be used for match toward any other program, and must be verifiable. Match must be reported monthly with records to substantiate activity and sources. Match may be provided as follows:

1. **In-Kind Match:** This is the value of a third-party contribution such as the value of volunteer time, value of space utilized, or the value of supplies contributed to conduct III B in home services. Documentation of in-kind match must be provided.
2. **Cash Match:** Cash match is the value of a contribution provided by the Second Party to carry out the III B in home services. This form of match may be supplies, personnel contributing outside the course of normal duties, space, cash.

3. Match Calculation:

Total Project Cost (gross total) x .15 = Match Amount; or

PADD Request / .85 = Total Project Budget
Total Project Budget – PADD Request = Match Amount

II. PADD REGIONAL INFORMATION

The PADD Area Agency on Aging and Independent Living service area is comprised of the following counties: Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall and McCracken. According to the Kentucky Data Center, Population data provided in the 2016 projection data using the 2010 census indicates 21.2% of all persons living in the PADD Region are 60 years old and above and 17.1% of all persons in Kentucky are 60 and above. Further, 25.8% of all people in Kentucky who are 60 and above live in Hickman County.

As the demographics of our communities continue to shift and change, our programs and service network must adjust to meet the needs and provide opportunities for its citizens. In particular, the senior service network must continue to develop and evolve into a system that has the ability to reach all of its older adults who currently need or potentially need services in the home and community setting.

As more individuals choose to remain in the community and their homes, it is the responsibility of the provider network to offer services in a manner that will allow for continued independence. Applicants shall consider if the current services, programs, and activities that exist within the community and provider network are appropriate to meet the needs of older individuals utilizing services over the next ten to twenty years. Applicants are encouraged to evaluate the effectiveness and quality of the current system and offer progressive services to meet the current and changing environment of the future. It is necessary to maintain the momentum of creating a progressive network of opportunities and assure the availability of services to all members of a community and particularly its older members.

III. ELIGIBLE POPULATION TO BE SERVED

Individuals, age 60 and older, who reside in the PADD region, meeting the eligibility guidelines of the III-B and III-C, programs may receive services upon completion of an assessment, approval for services and determination of service needs. The eligibility guidelines are outlined as a part of this proposal and shall be considered in planning and development of the proposal. Individuals determined eligible for services upon completion of an assessment of needs, may select among a network of providers approved to implement services through the PADD In-Home Services Program.

IV. MINIMUM REQUIREMENTS TO APPLY

Organizations may submit proposals for consideration of funding contingent upon meeting the following conditions:

- A. Financial Capability – Organizations must demonstrate financial solvency and be capable of supporting the programs and services described in their proposal. Organization must have a financial management system established and capable of tracking revenue and expenditures by funding stream or program.
- B. Eligible to Conduct Business in Kentucky and with the Federal Government – Organizations must either be registered with the Secretary of State's Office if incorporated, possess a current 501(C)(3) certificate to conduct business as a not-for-profit organization, or must possess a Business License issued by the Commonwealth of Kentucky. Additionally, organizations must not be barred from conducting business with the Federal Government as presented on the Federal Debarment and Suspension list. Organizations must possess a Federal and Kentucky State tax identification number. Providers must ensure that proper certification by OIG as a personal service agency must be completed with evidence of certification provided to PADD by the implementation date.
- C. Experience – Organization must be experienced in the delivery of human services and particularly providing in-home services for eligible individuals and be able to provide evidence of sustainability in providing proposed services and programs. At least three years' experience is preferred.
- D. Reporting and Computer Systems – Organization possesses computer hardware and software that meets the minimum standards established by PADD for purposes of reporting and communicating electronically. Organization can develop or currently has in place a reporting system to provide information regarding the units of service, number of PADD participants served, demographic data regarding those served, record of outcomes and time records for each service delivered. Organization will utilize regional information data system when it is fully implemented.
- E. Service Delivery Area- Organizations providing III B in home services, must be capable of providing service throughout the 8 county Purchase region that include: Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall, and McCracken.
- F. Match – Organization can provide the minimum required match toward the overall cost of the program. Match can be either cash or in-kind third-party contribution.
- G. Partnership - Accessing additional funds including fundraising to supplement public funding is encouraged. Details regarding planned events or methods of collecting and usage of additional funds is at the discretion of the organization, but mandatory for review during the procurement process.
- H. Facilities – Organization facilities where services are to be performed meet federal accessibility requirements and OSHA standards for safety and cleanliness.
- H. Staffing – Staff are available to deliver the services as proposed, have completed a criminal record check with a clean record prior to hire, and are licensed or trained as necessary to complete the service to be delivered.

V. TIMELINES

PADD will attempt to adhere to the evaluation and decision schedule but reserves the right to modify timeframes if in the best interest of the Agency and satisfactory completion of the procurement process.

June 7, 2023	Request for Proposals released.
June 14, 2023	Bidder's Meeting 10:00 a.m. Central Time. The Bidder's Meeting will be held virtually
June 16, 2023	Applicant inquiry period concludes on June 16, 2023 by close of business. This period allows written contact with PADD for asking questions regarding the application and process. Questions must be submitted at via email to cissy.fox@purchaseadd.org
June 21, 2023	Proposal must be received by PADD at https://purchaseadd-my.sharepoint.com/:f:/g/personal/cissy_fox_purchaseadd_org/EuqVMOrjfzhCrZitpOCKC1gBAQAoHKmpIkoCi50iVhtlBA by 12:00 Noon (Central Time).
June 28, 2023	Evaluation Team reviews and scores proposals
July 12, 2023	Aging Committee meets
July 23, 2023	PADD Board considers proposals

Submission Instructions:

All Responses must be received before the Closing Time at the designated electronic location, as identified in the Timelines section above.

Responses submitted by hard copy, mail, facsimile, or e-mail will not be accepted. Responses received after the Closing Time will not be considered.

Upload your submission at: https://purchaseadd-my.sharepoint.com/:f:/g/personal/cissy_fox_purchaseadd_org/EuqVMOrjfzhCrZitpOCKC1gBAQAoHKmpIkoCi50iVhtlBA

Important Notes:

- You will receive an email confirmation once you finalize your submission. This will confirm that you have successfully submitted your proposal.
- Each submitted item of requested information will only be visible to PADD after the Closing Time.
- Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.
- Minimum system requirements: Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. Java Script must be enabled.

Inquiries:

Inquiries must be submitted by close of business **June 16, 2023**.

Proposals submitted after the established deadline will not be accepted.

Upon completion of the opening, proposals will be reviewed for general responsiveness. Non-responsive proposals will not be reviewed with applicants notified in writing of non-responsiveness and non-review of proposal. Responsive proposals will be reviewed according to the established schedule and criteria with final consideration of proposals by the PADD Board of Directors.

VI. GUIDELINES FOR SUBMITTING PROPOSALS

A. Procurement Process and Requirements

Rules of Procurement

To facilitate this procurement, various rules have been established. These are described in the following paragraphs. The Second Party (Provider)s should review and comply with the General Conditions and Instructions for submission of proposals and utilize the inquiry period to ask questions. After the inquiry period has elapsed, subsequent questions will not be addressed by PADD management, staff, or council members.

The procurement process will provide for the evaluation of proposals and selection of the proposals to be selected for award. PADD anticipates the selection of multiple organizations to serve in the capacity of a III B in home services provider, and clients will be able to choose among a pool of eligible and contracted organizations to provide In-Home care as prescribed in the care plan.

Approach

The Purchase Regional Planning and Development Agency (PADD), in the exercise of its lawful duties, has determined that the services outlined in this proposal are necessary for the performance of the statutory and regulatory requirements of the PADD. The PADD has concluded that if either state personnel are not available to perform these services, or it

would not be feasible to utilize state personnel to perform these services. Additionally, a Second Party (Provider) is available and qualified to perform these services; and, for the before-stated reasons, the state agency desires to avail itself of the services of a Second Party (Provider).

The procurement process will provide for the evaluation of proposals and selection of the winning proposal in accordance with State law and regulations. KRS Chapter 45A of the Kentucky Model Procurement Code provides the regulatory framework for the procurement of services by State agencies.

Independent Price Determination

A proposal shall not be considered for award if the price in the proposal was not arrived at independently without collusion, consultation, communication, or agreement as to any matter relating to such prices with any other bidding entity or with any competitor. In addition, the bidding entity is prohibited from making multiple proposals in a different form.

The bidding entity must include a certified statement in the proposal that the price was arrived at without any conflict of interest, as described above (Assurances Section). Should a conflict of interest be detected at any time during the contract, the contract shall be null and void and the Second Party (Provider) shall assume all costs of the project until such a time that a new Second Party (Provider) is selected.

No Contingent Fees

No person or selling agency shall be employed or retained or given anything of monetary value to solicit or secure this contract, except bona fide employees of the bidding organization or bona fide established commercial or selling agencies maintained by the Offeror for the purpose of securing business. For breach or violation of this provision, PADD shall have the right to reject the proposal or cancel the contract without liability.

Cancellation of This Solicitation

In accordance with KRS 45A.105 and PADD policies and procedures, this Request for Proposals may be canceled at any time and for any reason, or all bids or proposals rejected, if it is determined in writing that such action is in the best interest of PADD. Receipt of proposal materials by PADD or submission of a proposal to PADD confers no rights upon the Proposer nor obligates PADD in any manner.

Cost of Preparing Proposal

Costs for developing the proposals are solely the responsibility of the Offerors. PADD will provide no reimbursement for such costs.

EEO Requirements

The Kentucky EEO Act, KRS 45.560-45.640, applies to all State government projects with an estimated value exceeding \$500,000.00. The Second Party (Provider) shall comply with all terms and conditions of the Act. Organizations submitting proposals will be required to certify in the assurances that it has complied with and adheres to the provisions of KRS 45.560 – 45.640.

Waiver of Minor Irregularities

PADD reserves the right to reject any offers and to waive informalities and minor irregularities in offers received providing such action is in the best interest of PADD. Where PADD may waive minor irregularities, such waiver shall in no way modify the RFP requirements or excuse the bidding organization from full compliance with the RFP specifications and other requirements if the bidding organization is awarded the contract.

Clarifications of Proposal

PADD reserves the right to request additional information as may reasonably be required for selection, and to reject any proposals for failure to provide additional information on a timely basis. PADD reserves the right to conduct discussions with any bidding organization who has submitted a proposal to determine the bidding organization's qualifications for further consideration. Discussions shall not disclose any information derived from proposals submitted by other offerors.

Best and Final Offers

PADD reserves the right at its discretion to request a Best and Final Offer (BAFO) for technical and/or cost proposals. Bidding organizations are cautioned to propose their best possible offers at the outset of the process, as there is no guarantee that any Offeror will be allowed an opportunity to submit a Best and Final technical and/or cost offer.

Rules of Withdrawal of Proposals

Prior to the date specified for receipt of offers, a submitted proposal may be withdrawn by submitting a signed written request for its withdrawal to the Sole Point of Contact listed on the Title Page.

Disposition of Proposals

All proposals become the property of PADD. The successful entities' proposals will be incorporated into the resulting contract by reference. Disposal of unsuccessful proposals shall be at the discretion of the Director of Social Services.

PADD's Right to Use Proposal Ideas

PADD shall have the right to use all system ideas, or adaptations of those ideas, contained in any proposals received in response to the RFP. Selection or rejection of the proposal will not affect this right.

Confidentiality of Contract Terms

The Second Party (Provider) and PADD agree that all information communicated between them before the effective date of the Contract shall be received in strict confidence and shall not be necessarily disclosed by the receiving party, its agents, or employees without prior written consent of the other party. Such material will be kept confidential subject to Commonwealth and Federal public information disclosure laws.

Upon signing of the Contract by all Parties, terms of the contract become available to the public, pursuant to the provisions of the Kentucky Revised Statutes. The Second Party (Provider) shall have an appropriate agreement with its Subcontractors extending these confidential requirements to all Subcontractors' employees.

Prohibitions of Certain Conflicts of Interest

In accordance with KRS 45A.340, the Second Party (Provider) represents and warrants, and PADD relies upon such representation and warranty, that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of its services. The Second Party (Provider) further represents and warrants that in the performance of the contract, no person, including any subcontractor, having any such interest shall be employed.

In accordance with KRS 45A.340 and KRS 11A.040 (4), the Second Party (Provider) agrees that it shall not knowingly allow any official or employee of PADD who exercises any function or responsibility in the review or approval of the undertaking or carrying out of this contract to voluntarily acquire any ownership interest, direct or indirect, in the company prior to the completion of the contract.

Sworn Statement Regarding Violations of Kentucky Revised Statutes

Pursuant to KRS 45A.485, Second Party (Provider)s are required to reveal final determinations of violation of certain statutes incurred within the last five years and be in continuous compliance with those statutes during the contract. Where applicable, the Second Party (Provider) is required to complete and submit the Sworn Statement Regarding Violations of Kentucky Revised Statutes with the Technical Proposal.

Open Records Law

Requests for bid/contract information shall comply with the Kentucky Open Records Act (KRS 61.870 to 61.884).

Deviations to Provisions of the Solicitation

The provisions appearing elsewhere in this Request for Proposals (RFP) shall become a part of any resulting contract. Any deviations from the provisions of the RFP must be specifically identified by the Second Party (Provider) in its proposal, which if successful, shall become a part of the Contract. Such deviations shall not be in conflict with the basic nature of the technical and cost requirements of this RFP. Deviations must be submitted as stated in Section 4 of this Solicitation. PADD reserves the right to reject any and/or all deviations in whole or in part.

Second Party (Provider) Response and Public Inspection

The RFP specifies the format, required information, and general content of proposals submitted in response to the RFP. The PADD will not disclose any portions of the proposals prior to contract award to anyone outside the PADD, representatives of the agency for whose benefit the contract is proposed, representatives of the Federal Government, if required, and the members of the evaluation committees. After a contract

is awarded in whole or in part, the PADD shall have the right to duplicate, use, or disclose all proposal data submitted by Second Party (Provider)s in response to this RFP as a matter of public record.

Any and all documents submitted by a Second Party (Provider) in response to the RFP shall be available for public inspection after contract award and in accordance with the Kentucky Open Records Act (KRS 61.870 to KRS 61.884).

The PADD shall have the right to use all system ideas, or adaptations of those ideas, contained in any proposal received in response to this RFP. Selection or rejection of the proposal will not affect this right.

B. Communications and Proposal Submission Criteria

Issuing Office

Purchase Area Development district (PADD) is issuing this RFP on behalf of the Area Agency on Aging and Independent Living. PADD is the only entity authorized to change, modify, amend, alter, or clarify the specifications, terms and conditions of this RFP.

Restrictions on Communications

The sole point of contact throughout the procurement process is to email Cissy.Fox@purchaseadd.org. All communications, oral and written (regular mail, express mail, electronic mail, or fax), concerning this procurement must be submitted only in this format. From the issue date of this RFP until a Second Party (Provider) is selected and the selection is announced, offerors are not allowed to communicate with any staff, Board or Advisory Council members concerning this RFP.

PADD reserves the right to reject the proposal response for any violation of this provision.

VII. SCOPE OF WORK SERVICES:

Title III B In-Home Services

PADD is seeking applications from organizations capable of providing In-Home Services as one package of available services for eligible clients. Services will be offered by the provider as a cluster of available services to individuals approved and authorized to receive III-B in Home Services. Pending continued authorization by DAAL, all subcontractors must be approved by PADD in advance of a contract and monitored by providers quarterly (with written monitoring report). Each client's care plan will designate the type of service authorized, the number of approved units of service and frequency services are to be delivered based on the individual need as a result of the assessment conducted by the PADD Case Management staff. Providers are expected to carry out the

services designated by case management staff. PADD reserves the right to modify the services or inclusion of services in this component for subsequent fiscal years if in the best interest of PADD and III-B clients. To complete a responsive application for PADD III-B In home Services, PADD is requesting that applicants make available all the following services to eligible clients in the Purchase area (with the exception of home delivered and congregate meals):

- A. **Homemaker Services:** Homemaker/Home Management – General household activities, including but not limited to non-medical personal care, shopping, meals preparation and routine household care, provided by a trained homemaker when the person regularly responsible for these activities is temporarily absent or unable to manage the come and care for themselves or others in the home.

Components of the Service: One unit of homemaker service is the provision of one hour of one or more of the following services:

1. Assistance with day-to-day household tasks necessary to maintain a person in their home.
 2. Teaching, instructing, and assisting with meal planning and preparation, nutrition, budgeting, shopping, laundry and general household management.
 3. Shopping for groceries and other necessities.
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- B. **Chore Services:** The performance of heavy housecleaning, yard tasks, and other activities needed to assist in the maintenance of a functionally impaired elderly person in his or her own home. All services are ordered by PADD and providers will be expected to provide the service, not to exceed the units authorized without prior authorization. The client will make available the tools and supplies necessary to complete chore requests.

Components of the Service: One (1) unit consists of one hour of chore service, which includes performance of tasks around the client's home.

1. Special chore services pending prior approval include assistance with heavy household tasks such as heavy cleaning and minor repairs needed to maintain a person in their home. These services may include lawn care, minor repairs, heavy cleaning, and snow removal.
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- C. **Personal Care:** Providing personal assistance with Activities of Daily Living (ADLs) For example: eating, dressing, bathing, toileting, transferring in and out of bed/chair and walking.

Components of Service: One (1) unit of Personal Care is the provision of one (1) hour of the following (in the client's home):

1. Instructing, teaching and assisting in the provision of routine and supportive tasks related to activities of daily living
2. Reporting changes in client's condition to supervisor or case manager;

3. Performance of tasks to maintain the health and safety of the client, including the living environment;
 4. Completion of appropriate records.
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D. **Respite:** Care provided by an approved caregiver or agency for a designated time period because of absence or need for relief of a primary caregiver. Respite care requires that all care giving activities provided by the usual caregiver to the client during the period of relief be performed by the respite worker, without exceeding the respite worker's capabilities or training.

Components of the Service: One (1) unit of Respite shall equal one (1) hour of respite service that could entail any of the above-defined activities.

E. **Escort (Assisted Transportation):** (1 way trip) The transportation of clients to medical-related appointments, treatment and therapy. This service does not include transportation for the purpose of errands, picking up prescriptions and shopping. Staff providing this service must receive appropriate training related to escorting and transporting clients in a safe manner. This service is considered a door to door service.

Components of the Service: One (1) unit is one (1) hour of escort services from the time the client is picked-up to the time the client is dropped off to destination (a one-way trip will be no less than one unit). The provider is not paid for driving time while client is not present. All trips authorized by PADD will be deemed to be at least 1 hour (one unit).

IN-HOME SERVICES PROVIDER RESPONSIBILITIES: Organizations funded to provide In-Home services will be responsible for the following:

1. Assure the provision of services throughout the geographic area covered under its plan or proposal.
2. Employers of III B in home services workers must assure that III B in home services workers are paid a livable wage and mileage payments at no less than the State mileage rate (changes quarterly) for work performed under this contract.
3. Assure that a staff person knowledgeable about III B in home services will answer telephone calls from clients, caregivers, PADD and other providers during normal business hours specified in the application response.
4. Treat clients in a respectful and dignified manner, involve the client and caregiver in the delivery of services and provide services in a timely and safe manner.
5. Permit staff of PADD and the Cabinet for Health and Family Services to monitor and evaluate services delivered. Request technical assistance when needed.
6. Assure that each paid or voluntary staff member meets minimum qualifications and training standards established by the Cabinet for Health and Family Services.

7. Assure supervisors of III B in home service workers participate in training arranged through PADD or an established subcontractor that meets the same standards for training as required for Homecare aides established in 910 KAR 1:180.
8. Maintain written job descriptions for staff and volunteer positions involved in direct service delivery and maintain written personnel policies and wage scales for each job.
9. Designate a supervisor to ensure staff providing In-Home services are provided professional supervision and monitor the timeliness and quality of service delivery. Supervisor needs to be available to PADD for client concerns during working hours.
10. Notify a client's designated PADD Case Manger when the client refuses or is unavailable for a particular service(s). Further, indicate the number of times the client has refused services. PADD reserves the right to close services that were cancelled by a client in compliance with PADD policies and procedures.
11. Notify client's PADD case manager when services are unable to be delivered by the service provider.
12. Transfer of Client Records – In the event an agreement with PADD is terminated, copies of all appropriate records of all active clients and/or participant data must be provided to PADD in order to best facilitate the client transition process.
13. Provide or arrange for appropriate insurance coverage to protect volunteers from personal liabilities.
14. Adhere to the guidelines set forth in the *PADD Policy and Procedures Manual*. The General Administrative and III B sections of the PADD Policy and Procedures Manual will be available at the bidder's meeting. Successful applicants will receive a hard copy and electronic copy of the most current version of PADD Policies and Procedures for implementation prior to July 1, 2023.
15. Initiate new client services within 5 business days of receipt of the request for services.
16. Provide and/or secure appropriate orientation prior to the delivery of services and continued in-service training annually for staff responsible for the provision of In-Home services in accordance with PADD Policies and Procedures.
17. Utilize the electronic data system specified by PADD and follow PADD procedures for accurate and timely input and maintenance of client data, case notes and communication with PADD case management staff. New PADD In-Home Services providers agree to implement and utilize the electronic data and reporting system. Annual service agreement charges and licenses will be covered by PADD, up to a maximum of one license established annually.
18. In the event the data system is temporarily inoperable, other methods to communicate and submit billing between the provider and PADD must include fax, e-mail, or telephone, at the direction of PADD.
19. Follow PADD procedures for reporting units of service in the electronic data system and adjustments to III B in home services units and charges for the delivery of services in the event an error is identified. Providers are expected to complete data entry of client information and units to be billed no later than two (2) weeks following the date of service or contact. PADD reserves the right to adjust its policy on adjustments to units of service, if necessary, to comply with its data and reporting requirements to the Cabinet for Health and Family Services.
20. When service is missed or rescheduled, providers must document missed or rescheduled services in the case notes section of the electronic data system utilized

- by PADD and its providers. PADD case management staff must also be notified. All client requests and/or comments must be documented in the electronic data system.
21. Ensure the accuracy of reports, units of service, and clients served on a monthly basis. Provide signed original invoices to PADD monthly by the date specified in the contract.
 22. Ensure that all staff and supervisors who have direct contact with clients complete a criminal background check in accordance with KRS 216.293. Participation in the Kentucky's National Background Check Program (KARES) as defined in 906 KAR 1:190E is optional. This system provides for a national background check which also includes fingerprinting.
 23. Subcontracting is prohibited without prior written approval of PADD.
 24. Notify Adult Protective Services and PADD when potentially unsafe and/or hazardous conditions exist that may place the client, case managers, aides or others in imminent danger.
 25. Notify Adult Protective Services and PADD Case Manager when there are suspicions of abuse, neglect or exploitation regardless of suspected perpetrator in accordance with KRS 209.
 26. Implement a plan that addresses how clients will be served and the procedures that will be instituted in the event an emergency or disaster occurs. Particularly events that occur while a III B in home services worker is in the home of a client. Plan should include coordination of III B in home services with PADD case management staff. It should also institute protocols for III B in home services worker communications with his/her employer and how clients will be assisted during the emergency or unexpected event. Emergency preparedness and service plans must include services for homebound persons during pandemic illness and for reducing the spread of disease through protocols established for the delivery of service. Ensure all staff have a copy of and/or understanding of the organization's emergency preparedness plan.
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VIII. SCOPE OF WORK SERVICES:

Title III C Congregate and Home Delivered Meals

PADD will select and contract with a meal provider for the delivery of this service. Entities selected to provide In-home Services will not be responsible for this service but must communicate with the PADD case manager in the event a problem with the meal service occurs and the III B- in home services PADD staff are made aware of the problem.

All meals provided for eligible PADD meal clients shall be delivered and, on a schedule, consistent with the client's care plan as ordered by PADD Case Managers.

Home Delivered Meals

Service Delivery Area -The service delivery area for congregate and/or home delivered meals shall be the Kentucky counties of Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall or McCracken Counties, any single county or any combination of those counties.

Provide hot meals for the period July 1, 2023 –June 30, 2026, with the option for PADD to extend meal preparation and delivery services through June 30, 2027. A total of 44,550 Homecare and NSIP-funded meals were served in FY 2019. The number of meals each year may vary depending on the needs of clients, future expansion and availability of funding. PADD reserves the right to extend this service agreement after completion of the first fiscal year contingent upon the availability of funding and satisfactory performance of services awarded.

1. The PADD's meals program offers modified texture meals, to include lunch and shelf stable meals or frozen meals (for emergencies) to eligible clients based on the results of an assessment.
2. PADD is implementing an expansion of the meals program by offering vegetarian meals. PADD reserves the right to extend or discontinue this service in subsequent contracts in the period covered by this request for quotes contingent upon the availability of funding and satisfactory performance of services awarded.
3. PADD is implementing a beverage choice in the meals program by offering (1) Calcium fortified juice and/or (2) Calcium fortified plant-based beverage for any client who cannot tolerate cow's milk.
4. Specify fixed cost quote based on the definition of a unit. One unit is equal to one meal. A meal means a portion of food that provides the equivalent of one-third of the dietary reference intakes (DRI); and the most recent Dietary Guidelines for Americans, published by the Secretary of Agriculture. All meals require certification of the above standard by a Registered Dietitian licensed in the Commonwealth of Kentucky (RD/LD).
5. Substitutions (or other menu changes) to the approved menus shall be minimal and all changes shall be reported to the PADD and shall be made only after receiving approval from the PADD.
6. Provide one meal per day and shelf stable meals or frozen meals (for emergencies) for each client as authorized and ordered by PADD case managers
7. Manufacture and package meals in a food preparation facility that complies with state and local fire, health, sanitation and safety. Use a foodservice system that assures microbial safety, nutrient retention, and sensory qualities of the food products during preparation and delivery. Meals shall comply with the most recent guidelines of the U.S. Department of Agriculture (US Food Code). Note: Products manufactured and packaged under USDA inspection are preferred.
8. Obtain comprehensive general liability insurance, which includes premises liability and product liability. Adequately insure all vehicles, equipment and facilities utilized in this program.
9. Appoint a contact person knowledgeable in program operations that shall be available to PADD for handling problems and answering questions that may arise. Employ adequate numbers of qualified staff to ensure satisfactory conduct of meals services. This includes qualified manager(s), professionals, kitchen/delivery staff,

- substitutes, subcontractors, and volunteers. Plan for the recruitment and retention of qualified staff.
10. Plan menus at least monthly and submit a copy to PADD. If DAIL approved menus are not utilized, a registered and Kentucky licensed dietitian (R.D./L.D.) shall certify, in writing, that menus meet the nutritional requirements through computer assisted nutrient analysis.
 11. The applicant shall distribute monthly a schedule of menus for meals to be served the following month to each congregate nutrition site and to homebound persons receiving home delivered meals.
 12. Package meals in containers that ensure safe and high-quality meals capable of re-thermalization in the clients' oven or microwave.
 13. Monitor meal preparation to determine that food production standards are being met and safe temperatures are maintained through the entire food service operation. Make time and temperature records available, as requested, for monitoring purposes.
 14. Report the number of units delivered into PADD's electronic data and reporting system. PADD requires the vendor to implement a system of client signature and safety check as delivery verification.
 15. Services provided outside the terms of this agreement and specifications will not be the responsibility of PADD.
 16. Plan for the transition of services. Program participants shall experience no interruption in services as a result of a change in provider.
 17. Home delivered meals shall be made for delivery during emergencies caused by inclement weather conditions, power failure, or disasters. Such meals shall be fresh, shelf stable, frozen, freeze dried, dehydrated, or a combination of these, provided they meet the nutritional requirements of the program. The type of meal and content of meal shall be submitted to the PADD for approval before delivery. The requirements for composition of the menu, distribution of meals, and reporting requirements are outlined in Administrative Regulations as provided in this RFP. All above requirements also apply to meals provided on holidays to home delivered meal clients when congregate or kitchen sites are closed.

The applicant shall provide condiments appropriate for serving with the meal as approved by the registered dietician and included on the menu. Condiment(s) that are on the menu shall be included in the unit cost. Condiment(s) shall be served in place of butter or margarine on days when the bread item is used to make a sandwich. Condiments listed below and any other condiments the nutrition service provider is willing to provide shall be listed in the proposal. Condiments shall include, but not be limited to: butter or margarine, ketchup, mustard, tartar sauce, salad dressing, sour cream, mayonnaise, dressings for tossed salads, and vinegar. In addition to the above condiments, the applicant shall provide pickle and onions for menu items when appropriate.

Coffee, tea and other beverages not included in the menu approved by the Registered Dietician shall not be eligible for reimbursement but may be offered to participants for a fee or as a donated service.

Congregate Meals

Service Delivery Area -The service delivery area for congregate and/or home delivered meals shall be the Kentucky counties of Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall or McCracken Counties, any single county or any combination of those counties.

Provide meals for the period July 1, 2023 –June 30, 2026, with the option for PADD to extend meal preparation and delivery services through June 30, 2027. A total of 44,550 Homecare and NSIP-funded meals were served in FY 2019. The number of meals each year may vary depending on the needs of clients, future expansion and availability of funding. PADD reserves the right to extend this service agreement after completion of the first fiscal year contingent upon the availability of funding and satisfactory performance of services awarded.

1. The PADD's congregate meals program offers modified texture meals, to include lunch and shelf stable meals or frozen meals (for emergencies) to eligible clients based on the results of an assessment.
2. PADD is implementing an expansion of the meals program by offering vegetarian meals. PADD reserves the right to extend or discontinue this service in subsequent contracts in the period covered by this request for quotes contingent upon the availability of funding and satisfactory performance of services awarded.
3. PADD is implementing a beverage choice in the meals program by offering (1) Calcium fortified juice and/or (2) Calcium fortified plant-based beverage for any client who cannot tolerate cow's milk.
4. Specify fixed cost quote based on the definition of a unit. One unit is equal to one meal. A meal means a portion of food that provides the equivalent of one-third of the dietary reference intakes (DRI); and the most recent Dietary Guidelines for Americans, published by the Secretary of Agriculture. All meals require certification of the above standard by a Registered Dietitian licensed in the Commonwealth of Kentucky (RD/LD).
5. Substitutions (or other menu changes) to the approved menus shall be minimal and all changes shall be reported to the PADD and shall be made only after receiving approval from the PADD.
6. Provide one meal per day and shelf stable meals or frozen meals (for emergencies) for each client as authorized and ordered by PADD case managers
7. Manufacture and package meals in a food preparation facility that complies with state and local fire, health, sanitation and safety. Use a foodservice system that assures microbial safety, nutrient retention, and sensory qualities of the food products during preparation and delivery. Meals shall comply with the most recent guidelines of the U.S. Department of Agriculture (US Food Code). Note: Products manufactured and packaged under USDA inspection are preferred.

8. Obtain comprehensive general liability insurance, which includes premises liability and product liability. Adequately insure all vehicles, equipment and facilities utilized in this program.
9. Appoint a contact person knowledgeable in program operations that shall be available to PADD for handling problems and answering questions that may arise. Employ adequate numbers of qualified staff to ensure satisfactory conduct of meals services. This includes qualified manager(s), professionals, kitchen/delivery staff, substitutes, subcontractors, and volunteers. Plan for the recruitment and retention of qualified staff.
10. Plan menus at least monthly and submit a copy to PADD. If DAIL approved menus are not utilized, a registered and Kentucky licensed dietitian (R.D./L.D.) shall certify, in writing, that menus meet the nutritional requirements through computer assisted nutrient analysis.
11. The applicant shall distribute monthly a schedule of menus for meals to be served the following month to each congregate nutrition site and to homebound persons receiving home delivered meals.
12. Package meals in containers that ensure safe and high-quality meals capable of re-thermalization in the clients' oven or microwave.
13. Provide orientation and training for staff and volunteers working in the meal preparation and delivery program.
14. Monitor meal preparation to determine that food production standards are being met and safe temperatures are maintained through the entire food service operation. Make time and temperature records available, as requested, for monitoring purposes.
15. Use equipment in the preparation and delivery of food that meets standards set by all applicable laws and regulations of the State Health Department.
16. Report the number of units delivered into PADD's electronic data and reporting system. PADD requires the vendor to implement a system of client signature and safety check as delivery verification.
17. Services provided outside the terms of this agreement and specifications will not be the responsibility of PADD.
18. Plan for the transition of services. Program participants shall experience no interruption in services as a result of a change in provider.
19. Home delivered meals shall be made for delivery during emergencies caused by inclement weather conditions, power failure, or disasters. Such meals shall be fresh, shelf stable, frozen, freeze dried, dehydrated, or a combination of these, provided they meet the nutritional requirements of the program. The type of meal and content of meal shall be submitted to the PADD for approval before delivery. The requirements for composition of the menu, distribution of meals, and reporting requirements are outlined in Administrative Regulations as provided in this RFP. All above requirements also apply to meals provided on holidays to home delivered meal clients when congregate or kitchen sites are closed.

The applicant shall provide condiments appropriate for serving with the meal as approved by the registered dietician and included on the menu. Condiment(s) that are on the menu shall be included in the unit cost. Condiment(s) shall be served in place of butter or margarine on days when the bread item is used to make a sandwich. Condiments listed below and any other condiments the nutrition service provider is willing to provide shall be listed in the proposal. Condiments shall include, but not be limited to: butter or margarine, ketchup, mustard, tartar sauce, salad dressing, sour cream, mayonnaise, dressings for

tossed salads, and vinegar. In addition to the above condiments, the applicant shall provide pickle and onions for menu items when appropriate.

Coffee, tea and other beverages not included in the menu approved by the Registered Dietician shall not be eligible for reimbursement but may be offered to participants for a fee or as a donated service.

HOME DELIVERED MEALS – PROVIDER RESPONSIBILITIES: Organizations funded to provide Home Delivered Meal services will be responsible for the following:

1. Provide PADD Area Agency on Aging with statistical and other information necessary for State reporting requirements (number of meals and clients served, match, program income, etc.).
2. Employ an adequate number of qualified staff to ensure satisfactory delivery of the service;
3. Permit the staff of PADD Area Agency on Aging, the Department of Aging and Independent Living and federal representatives to monitor and inspect the operation;
4. Participate in meetings as scheduled by PADD;
5. Monitor quality of meals delivered to clients and report to PADD in required format and consistency to ensure quality and compliance;
6. Provide the minimum required match toward the overall cost of the program.

IX. SCOPE OF WORK SERVICES:

III B Supportive Services

PADD is seeking applications from organizations capable of providing IIIB supportive services as one package of available services for eligible clients. Services will be offered by the provider as a cluster of available services to individuals approved and authorized to receive III-B Supportive Services. Pending continued authorization by DAIL, all subcontractors must be approved by PADD in advance of a contract and monitored by providers annually (with written monitoring report). To complete a responsive application for PADD III-B In home Services, PADD is requesting that applicants make available all of the following services to eligible clients in the Purchase area (with the exception of home delivered and congregate meals):

-
- A. **Education (Senior Center Services) 1 unit:** Providing formal or informal

opportunities for individuals to acquire knowledge, experience, or skills. Includes individual or group events designed to increase awareness in such areas as nutrition, crime, scams, or accident prevention; promote personal enrichment, for example through continuing education; to increase or gain skills in a specific craft, trade, job, or occupation. One unit of education is one hour.

- B. **Transportation (Access) 1 One-way trip:** Transportation from one location to another (curb to curb). Transportation does not include any other activity. The following applies for transportation. Transportation services shall be: provided by a trained individual, transportation older persons to or from community resources to access or receive needed services, comply with federal, state, and local regulations, and use vehicles safe and accessible to older persons and properly insured to protect the participants in accordance with state regulation.
- C. **Health Promotion (Senior Center Services) 1 session:** Services which include health screenings and assessments; organized physical fitness activities, evidence-based health promotion programs; medication management; home injury control services; and/or information, education, and prevention strategies for chronic disease and other health conditions that would reduce the length or quality of life of the person aged sixty (60) or older.
- D. **Information and Assistance (Access) 1 contact:** Providing a service for individuals to provide current information about services available within the community. It can link individuals to the services and opportunities that are available to the maximum extent and establish adequate follow-up procedures. Internet website hits are to be counted only if information is requested and supplied.
- E. **Outreach (Access) 1 contact:** Interventions with individuals initiated by an agency or organization for the purpose of identifying potential clients (or their caregivers) and encouraging their use of existing services and benefits.
- F. **Recreation (Senior Center Services) 1 contact:** Provision of activities which foster the health or social wellbeing of individuals through social interaction and the satisfying of leisure time. Activities should not exclude ADA or ESL individuals.
- G. **Telephone reassurance (In-home services) 1 contact:** Phoning a client to provide comfort or help. Backup documentation must be included.

Title III-B Supportive SERVICES PROVIDER RESPONSIBILITIES: Organizations funded to provide Title III B supportive services will be responsible for the following:

1. Health (including mental health), education and training, welfare, informational, recreational, homemaker, counseling, or referral services;
2. Services designed to enable older individuals to attain and maintain physical and mental well-being through programs of regular physical activity, exercise, music therapy, art therapy, and dance-movement therapy;
3. Services designed to provide health screening (including mental health screening) to detect or prevent illnesses, or both, that occur most frequently in older individuals;
4. Effective referral to existing health (including mental health) services; and

5. Health and nutrition education services, including information concerning prevention, diagnosis, treatment, and rehabilitation of age-related diseases and chronic disabling conditions.

X. CONTRACT INFORMATION FOR SUCCESSFUL ENTITIES

A. Basis of Contract

Applicants will be selected to be awarded a contract based on the best evaluated bid price and final and best offer by PADD. PADD anticipates selecting more than one provider of service, as clients will be provided the opportunity to select a provider, they believe will best meet his/her needs (client choice). Agreements will be awarded through the period July 1, 2023 – June 30, 2026, the first year of this procurement period. PADD has the option to extend the contract throughout the procurement period contingent upon satisfactory performance of services, availability of funding, and authorization to provide services. PADD reserves the right to negotiate any terms, conditions, and payment methods with successful applicants as appropriate. The type of contract and payment method will be a fixed unit price, which may vary per service.

PADD reserves the right to modify unit pricing to ensure reasonableness of cost for services and to address external factors that affect pricing and the cost of delivering services. The line-item budget submitted for In-Home Services will be utilized as the initial basis of establishing unit prices for In-Home services. Payment is based on services authorized by PADD and delivered by the successful provider(s) or its subcontractor(s).

PADD reserves the right to refuse any and all proposals and to accept those proposals that are most advantageous to PADD in carrying out the goal of the program. Applicants will be notified in writing of approval or denial of funding. Services are to be provided to people, age 60 or over, based on the eligibility criteria to receive IIIB in-home services. Clients of the III B in home services program must reside in the PADD region and applicants may serve multiple counties. Identify the counties to be served by the applying organization on the coversheet of the proposal package. Upon final selection of successful proposals submitted in response to the RFP, all proposals, with the exception of proprietary information, must become public documents of PADD and must be open for review by the public.

B. Subcontracting

Subcontracting of **In-Home** services in whole or in part will be permitted, only with prior approval from PADD. Applicants must submit a draft copy of all subcontracts, memoranda of understanding or agreements applicable to the services to be delivered with the submission of the proposal. Subcontractors, if applicable for specific services, must be monitored quarterly by service providers that are

successful and awarded a contract by PADD. PADD will prohibit any entity from requesting a subcontractor to complete major components of the services for which it is submitting a proposal. It is anticipated that if allowable through PADD's funder, that entities subcontracted are those that perform intermittent (emergency) or ancillary services to the primary in-home service delivery.

C. Post-Contract Audit

Organizations receiving State General Funds will be required to certify its final closeout report and invoice, including the number of the final service units delivered, amounts paid by PADD and all match. Entities required to complete a single audit must complete the audit and submit to PADD as specified in 2 CFR, Part 200 and A-133 as applicable. The Cabinet may require specific entities complete an audit in compliance with Governmental Auditing Standards under certain conditions, such as amount of revenue received or types of services delivered.

D. Pre-Contract Costs

All costs incurred prior to the date of the contract award are not allowable for reimbursement from PADD through this process.

E. Availability of Funds

PADD has no legal liability for payment of funds or award of a contract until funds are made available to PADD for this procurement and notice of such availability, to be confirmed in writing by the Executive Director of PADD, is provided to the Contractor.

F. ExParte Contact

ExParte contact with any member of the PADD Aging Advisory Council, PADD staff and/or PADD Board of Directors in an effort to provide information or influence a recommendation outside a scheduled public meeting established by PADD must be grounds for disqualification of the proposal from further consideration of funding.

G. Reporting Requirements: In-Home Services ONLY

Successful applicants will be expected to complete monthly and quarterly program and financial reporting documents. Further, client intake forms containing information necessary to meet Federal reporting requirements will be necessary for each client served. As service units are delivered throughout each month, successful applicants will be required to maintain documentation to validate service units (time records per day), and complete data entry of service units and client information by the 5th business day of each month following the month when activity is reported. Quarterly reports will contain statistical and program summary information to evaluate the continued effectiveness of services. Reporting requirements will include the following:

1. Number of unduplicated clients served, and service units delivered monthly;
2. Signed billing reports submitted to PADD upon completion of specific projects;

3. Document, retain and submit match (minimum match requirement) and program income source documentation to validate allowable match and program income;

4. Final program performance report to document services delivered and final outcomes in accordance with the final negotiated project and include results of client satisfaction or evaluation results. The final report must contain a summary of services and units of service delivered, performance data, and other information related to the delivery of services;

Additional information may be requested as necessary for PADD to meet its reporting requirements to DAIL and Federal Authorities.

H. Performance-Based Penalties:

PADD reviews performance on a regular basis. In the event of underperformance or non-performance, PADD will work with the contracted organization to resolve the performance issue. PADD reserves the right to amend and revise provider contracts including the recoument of or reduction in funding.

XI. PROTEST

Pursuant to KRS 45A.285, The Secretary of the Finance and Administration Cabinet, or his/her designee, must have authority to determine protests and other controversies of actual or prospective parties in connection with the solicitation or selection for award of an Agreement or Contract.

Any actual or prospective party, who is aggrieved in connection with the solicitation or selection for award of an Agreement or Contract, may file protest with PADD in accordance with its grievance policies, with state level grievances to be conducted in accordance with KRS 13B. A protest or notice of other controversy must be filed promptly and in any event within two (2) calendar weeks after such aggrieved person knows or should have known of the facts giving rise thereto. All protests or notices of other controversies must be in writing and must be addressed to:

Jeremy Buchanan
Executive Director
Purchase Area Development District
1002 Medical Center Dr.
Mayfield, KY 42066

PADD will follow its local resolution process and if satisfactory resolution to a grievance is not established at the local level, state level fair hearing procedures must be followed. A copy of that decision must be mailed or otherwise furnished to the aggrieved party and must state the reasons for the action taken.

All disputes escalated to a State Level review or hearing will receive a decision by the Secretary of the Finance and Administration Cabinet and shall be final and conclusive.



XII. PROPOSAL APPLICATION INSTRUCTIONS

GENERAL INSTRUCTIONS

The following is a list of documents to be included in the completed proposal package submitted to PADD for consideration of funding.

- Letter of Application including signed assurances and certifications
- Organization Capability and Experience
- Proposal Application – General Section and Scope of Work (***Specific to type of service being provided***)
 - ***Title III B Supportive services only***
 - Description of services and programming that will be provided to include estimated number of units of service
 - Program goals and objectives
 - Staff/volunteer training plan
 - ***Escort only***
 - Scheduling procedures
 - Days and hours escort will be available
 - Description and number of vehicles that will be used
 - Make and model of vehicles, Agency or private-owned
 - Accessibility of vehicles
 - Driver qualifications and auto insurance requirements
- Attachment B
- Programmatic and Budget Worksheets (specific to each program)

- Application summary
- Program Budget and Backup
- Resources Used for Match Form
- Staffing plan
- Certification of Current Cost and Pricing Data

ADDITIONAL INSTRUCTIONS

LETTER OF APPLICATION

The Letter of Application and the attached Assurances and Certifications (Attachments to Be Completed and Submitted With Application) must be signed and dated by the person authorized to legally bind the Applicant to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor of a sole proprietorship. Along with introductory remarks, the Letter of Application is to include the following information about the applicant any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and email of legal entity or individual with whom final contract, if awarded, would be executed.
2. Name, address, telephone number and email address of each principal officer (president, chairperson of the board of directors, CFO, etc.).
3. Legal Status of the Applicant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number.
5. Location of the facility from which the applicant would operate.
6. Identify any Purchase Area Development District employee(s), Aging Committee member(s) or Purchase Area Development District Board of Directors who may have conflict of interest related to the evaluation, selection and/or award of this application due to their relationship with the Applicant. Include his/her position and responsibilities within the Applicant's organization. If following a review of this information, it is determined by the Agency that conflict of interest information has not been disclosed, the Applicant's proposal will immediately be disqualified and any further consideration by the Agency will be terminated.
7. List all services/programs that are being applied

ORGANIZATION CAPABILITY AND EXPERIENCE

The Applicant's organizational capability and experience should be completed only one time regardless of the number of services Applicant is proposing to deliver.

1. Describe the following:
 - a. Attach Applicant's organizational chart;
 - b. Applicant's organization which would include current mission statement, overall goals and objectives, and how the organization has successfully provided services to older adults in a similar manner as being requested for each Service/Program in the RFP;
 - c. If the Applicant does not currently provide services in the Purchase District, fully describe the planning steps (including milestones) leading up to how

these services will be provided to clients with a start date of July 1, 2023, and thereafter (if awarded contract).

2. Describe any service/program innovation and/or any awards received for the services/programs listed above.
3. Personnel records shall be maintained for all staff and volunteers. Records for each must contain, but not be limited to, application for employment form and/or resume, job description, TB screening documents (as applicable), criminal records check, and all job specific training received by staff and volunteers along with any other agency required documents.
4. Provide job descriptions for all Service/Program related positions, including those of volunteers.
 - a. Provide a resume or list the qualifications of staff and volunteers in each program including supervisors, managers and all direct service staff. Include a copy of applicable licensing and/or certifications.
 - b. Indicate starting salary range for each new staff position/job category. List benefits provided to staff (i.e., mileage pay and rate per mile, sick/vacation days per year, provision of uniforms, retirement plans, health insurance, etc.).
 - c. Submit Applicant's plan to recruit and retain quality staff.
5. Describe your agency's contingency plan for when regular staff are unavailable and include back-up arrangements to insure consistent and quality service delivery. List for all services/programs applied for:
 - a. Maximum length of time worker is off before replacement of worker.
 - b. Maximum length of time worker is off before client receives services.
 - c. Method used by agency to provide replacement worker as quickly as possible.
 - d. How client is notified of situation when a worker is absence.
 - e. How and when Case Manager (if applicable) is notified of worker's absence.
 - f. Plan to continue services to client in absence of regular staff.
 - g. Indicate if agency employs PRN staff to cover absences and describe how long the agency has used PRN staff including a description of the success or failure of serving clients using this method.
 - h. Indicate how long, on average, clients in the agency's client files, have gone without (ordered) services due to lack of staff over the last two full fiscal years. Also, provide the longest of time a client has gone without service due to lack of staffing. Provide documentation which may include letters from other contractors (if not a current contractor of Agency) employing the applicant agency to perform the same service(s) as being applied for in the Purchase ADD.
6. Describe how staff will be properly identifiable when seeing clients/participants (use of official agency badges or uniform, etc.)
7. Describe the Applicant's plan to utilize staff for each of the Services/Programs (as applicable) that Applicant is applying for. Staff must meet the requirements of the DAIL SOP's and all other requirements.
8. Describe current use of staff. Be specific as to the number of staff used per county and per site, and an approximate number of hours worked.
9. Provide written policies and procedures for the following for staff (provide as an attachment):

- a. Means of recruitment;
- b. Application
- c. Position Description
- d. Screening methods including:
 - i. TB Skin Test documents (as applicable)
 - ii. Criminal Records Check
 - iii. Training
 - 1. Include a new volunteer orientation agenda with applicable attachments
 - 2. Include agenda of training for specific position staff is assigned
 - 3. Describe ongoing Training. Be specific as to: Frequency, Resource Providing Training, Sample topics,

10. Supervision

11. Monitoring

- a. Evaluation of staff performance (provide evaluation tool)
 - i. Include who will conduct monitoring staff performance
 - ii. What tool(s)/documentation will be used to monitor performance
 - iii. Frequency staff performance will be monitored
 - iv. Time keeping of work and services provided
 - v. Reimbursement for expenses

12. Retention/Recognition methods

13. Employee/Volunteer Code of Conduct

14. Use of volunteers: Describe the Applicant's plan to utilize volunteers for each of the Services/Programs (as applicable) Applicant is applying for. However, volunteers are considered unpaid staff and as such, they must meet the requirements of the DAIL SOP's and all other requirements of regular staff.

- a. Describe current use of volunteers. Be specific as to number of volunteers used per county and per site, and an approximate number of hours worked.
- b. Provide written policies and procedures for the following for volunteers (provide as an attachment):
 - i. Means of recruitment;
 - ii. Application
 - iii. Position Description
 - iv. Screening methods including:
 - 1. TB Skin Test documents (as applicable)
 - 2. Criminal Records Check
 - v. Training
 - 1. Include a new volunteer orientation agenda with applicable attachments
 - 2. Include agenda of training for specific position volunteer is assigned
 - 3. Describe ongoing Training. Be specific as to: Frequency, Resource Providing Training, Sample topics, and Supervision
 - vi. Monitoring
 - 1. Evaluation of volunteer performance (provide evaluation tool)
 - a. Include who will conduct monitoring volunteer performance

- b. What tool(s)/documentation will be used to monitor performance
- c. Frequency volunteer performance will be monitored
- d. Time keeping of work and services provided
- e. Reimbursement for expenses

Retention/Recognition methods

1. Describe the Applicant’s provision of, or arrangements to provide, adequate liability insurance to protect employee/volunteer from personal liability.
2. Describe all fundraising activities Applicant plans to undertake, the amount of funds anticipated to be raised, the services to which those funds will be targeted and if the funds collected will be used as match. If fundraising is not utilized please indicate.
3. Has the Applicant organization ever been cited, sanctioned debarred, suspended or had audit exceptions from a Federal or State or local government contract? If yes, describe infraction and date, name and address of monitoring entity, and final outcome.
4. Has the Applicant organization filed for bankruptcy or restructuring under the U.S. bankruptcy code? If yes, when?
5. Include applicant’s internal incident reporting policy regarding client and staff incidents and describe how the Applicant’s organization will comply with the Agencies Incident Reporting Policy as listed in Attachment A Reference Materials,
6. Name the Internet Service Provider Applicant is using. High speed internet connectivity with regard to local (Purchase Area) administration and delivery of the services noted in this RFP is a requirement of the Agency. Individually describe the Applicant’s disaster, bioterrorism and flu pandemic plans or attach a copy of each. Include the name, title and contact information relative to the Applicant’s designated disaster/bio-terrorism/flu pandemic staff member.

ATTACHMENTS TO BE COMPLETED AND SUBMITTED WITH APPLICATION

Complete each Service or Program Proposal, Cost Proposal attachment as identified in the Letter of Application. If a question is not applicable to an Applicant’s organization please mark with an N/A. The Service or Program section should be no more than 7-10 pages per attachment.

- | | |
|--------------|---|
| Attachment A | Reference Materials |
| | Code of Conduct for the Award and Allocation of Aging Funds |
| | FY 2022 Current Subcontractor Funding Levels |
| | FY 2022 Fixed Price unit Costs by Program |
| | Geographical and Volume Information |
| | Population Statistics from 2020 Census |
| | Local Administrative Review Procedures |
| | Purchase Area Development District |
| | Area on Aging and Independent Living |
| | Policies and Procedures FY 2022 |

Sample Contract

Attachment B Attachments to Be Completed and Submitted With Application
Application Submission Cover Sheet
Verification of Intent
Assurance of Program Administration Compliance
Certification of Assurances and Compliance with General Provisions
Department of Health and Human Services Assurance of Compliance
with Section 504 of the Rehabilitation Act of 1973 as Amended
Assurance of Compliance with the Department of Health and Human
Services Regulation Under Title VI of the Civil Right Act of 1964
Assurance of Compliance with the Americans with Disabilities Act of 1990
Certification Regarding Drug-Free Workplace and the Requirements
Contractor Certification of Designated Program Administrator
Procurement Requirements
Invoice Authorization
Legal Document Authorization
Terms and conditions for Official Application
Certification of Prohibited Employee Activities
Board Membership List
Applicant Staffing Plan

Attachment C Title III B In-Home Services
Escorted Transportation
In-home Respite
Homemaker Services
Personal Care Assistance
Home Repair-Modification
Complete and submit all documentation indicated in this attachment

Attachment E Title III B Supportive Services
Health Promotion
Telephone Reassurance
Transportation
Education
Recreation
Information and Assistance
Outreach
Complete and submit all documentation indicated in this attachment

Attachment F Title III C Nutrition
Title III C1 Congregate Meals
Title III C2 Home Delivered Meals

Complete and submit all documentation indicated in this attachment

The cost submitted under this proposal if accepted will be the contracted rate for the time period of July 1, 2023 through June 30, 2026.

INSTRUCTIONS

1. The Bidder's Meeting requirement for this RFP will be held June 14, 2023, 10:00 am Central Time, and may be attended via conference call if requested in advance by emailing Cissy.Fox@PADD.org for details. Organizations are permitted to submit inquiries up to Close of Business, June 16, 2023. Proposals may be viewed on the PADD website and downloaded from www.purchaseadd.org.
2. Applicants may submit a completed proposal electronically to https://purchaseadd-my.sharepoint.com/:f/g/personal/cissy_fox_purchaseadd_org/EuqVMOrjzhCrZitpOCKC1gBAQAoHKmplkoCi50iVhtlbA. Attachments and addenda must be clearly identified and labeled in the proposals. Proposals are due to PADD no later than **12:00 Noon (Central Time) June 21, 2023. Proposals not completed in the format outlined or with questions unanswered will not be considered for funding. PADD reserves the right to accept or reject any or all proposals and to obtain additional information from applicants to consider final recommendations for funding if this information is deemed necessary and will benefit the agency.**
3. Submit completed forms following the checklist above by uploading into the appropriate requested documents slots in https://purchaseadd-my.sharepoint.com/:f/g/personal/cissy_fox_purchaseadd_org/EuqVMOrjzhCrZitpOCKC1gBAQAoHKmplkoCi50iVhtlbA
4. Proposals will be reviewed for reasonableness of cost for the services, completeness of responses in the application, past performance as an entity serving older adults (statistical data), proposed services that address the needs of older adults and the changing population, and other criteria as established by PADD.
5. Applicants that fail to respond to any section or topic may be declared non-responsive and will not be considered for funding during the procurement cycle. Applicants that submitted non-responsive applications may submit applications for future procurements. Questions that do not pertain to the services proposed or not applicable to the applicant organization should be marked "not applicable" or NA.
6. It is expected that all required forms and information requested are signed and submitted with the application to be considered for review. **The proposal will not be scored if the forms are not complete.**
7. **Electronic proposals must be submitted to https://purchaseadd-my.sharepoint.com/:f/g/personal/cissy_fox_purchaseadd_org/EuqVMOrjzhCrZitpOCKC1gBAQAoHKmplkoCi50iVhtlbA. All proposals are due no later than 12:00 noon, (Central Time) June 21, 2023. Proposals received after that time and date must not be considered for review.**

