



The Heritage Agency™

Request for Proposal (RFP) Application Overview Fiscal Year 2018

The Heritage Area Agency on Aging/Kirkwood Community College is seeking applications from any non-profit agency or private organization to provide and/or expand home and community based services to individuals, age 60 and older, in Benton, Cedar, Iowa, Johnson, Jones, Linn and/or Washington counties.

Benton	Linn	Jones
	-	
Iowa	Johnson	Cedar
	Washington	

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Request for Proposal (RFP) Overview

The Heritage Area Agency on Aging, a department of Kirkwood Community College, is seeking applications from any non-profit agency or private organization to provide and/or expand home and community based services to individuals, age 60 and older, in Benton, Cedar, Iowa, Johnson, Jones, Linn and/or Washington counties for the following services (taxonomies):

- Adult Day
- Assisted Transportation
- Caregiver Respite
 - In-home
 - Facility Based
- Chore Services
- Congregate Meals
- Home Delivered Meals
- Information & Assistance
- Legal Assistance
- Nutrition Counseling
- Transportation

The purpose of the request for proposal (RFP) is to obtain a service provider(s) that can demonstrate the ability to provide quality services through the utilization of a cost effective and efficiently managed service delivery system. Proposals are being accepted that serve the entire seven county Heritage region or individual communities or counties.

The selected providers will operate under a contract contingent upon continued Older Americans Act funding and funding from other sources to Heritage, in addition to the subcontractor's successful fulfillment of contract requirements. Applications are for the period of July 1, 2017 through June 30, 2018, with a possible additional year. Heritage will award up to two-year contracts.

Services delivered through Heritage funding are required to meet all federal and state obligations of the proposed service, including the Older Americans Act of 1965 (revised), funding source(s) and Heritage contractual terms.

Organizations that apply for funding and are successful in being selected as a provider will need to have the ability to do the following:

- RFP application must be completed electronically and in the format provided
 - The application is a fillable pdf form
 - The budget is in excel format
- In order to retain the integrity of the documents, it is recommended the Applicant uses Adobe Acrobat Reader DC and Microsoft Office 2007 or newer.
 - You can access a free download of Adobe Acrobat Reader DC here:
<https://get.adobe.com/reader/?promoid=KLXME>
- Achieve a score of 60 points or greater on the Scoring Rubric and in the event of a competitive bid, earn the highest point total.
- Comply with all pertinent and prevailing laws and fulfill the guidelines as set in the Heritage contract, the Older Americans Act, and taxonomy definitions.
- Deliver services as described in the RFP.
- Support the program by committing resources to fulfill program match requirements of 25%. This match requirement can be met in a variety of ways including other organizational funding sources and/or in-kind services and supports (see Budget section of these instructions)
- Conduct outreach to seniors and their caregivers to inform eligible individuals about services and where additional information on community resources can be obtained (see taxonomy definitions for outreach).
- Distribute nutrition education information provided by HAAA (applicable to Congregate and Home Delivered Meals – see taxonomy definitions for nutrition education).
- Fulfill the reporting requirements as described in the sample contract (subject to change)

- Consumer intake forms are required for all individuals receiving services with the exception of legal assistance and outreach as described in the sample contract (subject to change)
- Partner with Heritage to achieve successful outcomes for the following program goals:
 - To provide access to services/meals that specifically meet the unique needs of at-risk and frail older adults
 - To provide the greatest number of services/meals possible to older adults in the service area by maximizing resources allocated
 - To achieve program sustainability and fiscal stability while operating within the guidelines of the Older Americans Act and those requirements specific to the program and funding source(s)
 - To build a delivery system that, as required by the Older Americans Act, specifically supports low-income, rural, minority, and at-risk seniors
 - To avoid the duplication of services or service areas to maximize program efficiency
 - To ensure fiscal responsibility, program compliance and transparency in the funding of services/meals

RFP Timeline

November 17, 2016	RFP release announced
January 5, 2017	RFP Application released through the Heritage website
January 10, 2017	Bidder's Conference – 9:00 AM (opportunity #1) Bidder's Conference – 11:30 AM (opportunity #2)
February 9, 2017	Last day for questions with guaranteed response
February 16, 2017	RFP Applications due at 12:00 PM (noon)
March 2017	RFP Applications reviewed and scored
May 2017	Anticipated award notification letters issued
June 2017	Anticipated contracts issued/acceptance
June 30, 2017	Signed and dated contracts due to Heritage
July 1, 2017	Anticipated contract start date

RFP Release

The RFP documents can be accessed from the Heritage website at www.heritageaaa.org on or after Thursday, January 5, 2017.

Bidders Conference Details

HAAA will be hosting two Bidders Conferences to provide assistance in understanding the directions for completing the RFP application. In addition, the RFP Applicants will have the opportunity to ask questions. Attendance at one or both of the Bidder's Conference is not required, but **strongly encouraged**.

The Bidders Conferences will be held on:

Tuesday, January 10, 2017
#1 9:00 AM – 10:30 AM
#2 11:30 AM – 1:00 PM
Amana Room, Third Floor of Iowa Hall
6301 Kirkwood Blvd. SW
Cedar Rapids, IA 52404

The RFP application and supporting documentation is due no later than
12:00 p.m. (Noon) on Thursday, February 16, 2017

Method for additional questions

All questions regarding the Application or RFP Process must be submitted via email to Kellie Elliott-Kapparos, Director of Operations Policy, Contracts, and Quality, at kelliot@kirkwood.edu. A summary of questions and answers will be posted on the Heritage website, www.heritageaaa.org. The last opportunity for a guaranteed response to questions will be Thursday, February 9, 2017.

Points of Clarification/Disclaimer

This procurement is through a bidding process, with competition obtained to the maximum extent practicable in conformance with the Iowa Administrative Code and Federal guidelines. Where other factors are equal, preference will be given to Iowa contractors of goods and services over out-of-state contractors, in compliance with State law, IAC 321-5.14(2). Applicants may be contacted for additional information or presentation while bids are reviewed.

Heritage reserves the right to refuse any or all proposals deemed not acceptable and may request new bids or negotiate if competition is inadequate. Any reasonable request to compete will be honored to the maximum extent practical.

Heritage reserves the right to reject any or all proposals if such a rejection is in the best interest of Heritage. This RFP is a solicitation for offers and is not to be construed as an offer, guarantee or a promise that the solicited services will be purchased by Heritage. Heritage may withdraw this request for proposal at any time and for any reason without liability for damages, including, but not limited to, bid preparation costs.

Heritage reserves the right to negotiate with any potentially successful Applicant(s) and may request additional information or modifications.

Heritage reserves the right to arrange an on-site interview and review to determine the Applicant's ability to meet the terms and conditions of the potential contract.

Applicants may request a summary copy of their RFP Scoring after awards have been issued by sending a written request to:

Joe Sample
Executive Director
The Heritage Area Agency on Aging
Kirkwood Community College
6301 Kirkwood Blvd. SW
Cedar Rapids, Iowa 52404

Requests will be honored within 30 days of receipt of the request

Who is The Heritage Area Agency on Aging?

Area Agencies on Aging (AAAs) are agencies established under federal law, the Older Americans Act of 1965 (revised), to respond to the needs of Americans age 60 and over in every local community, with the goal of keeping seniors living independently in their own homes.

The Heritage Area Agency on Aging (“HAAA”), a department of Kirkwood Community College, is designated by the Iowa Department on Aging to carry out these and other duties of an Area Agency on Aging in Benton, Cedar, Iowa, Johnson, Jones, Linn and Washington counties.

HAAA plans, coordinates and funds a variety of human services programs that serve the 87,426 older adults who reside in the seven county region (*U.C. Census Bureau, 2011-2015 American Community Survey Estimates*).

Heritage serves people age 60 and older and adults with disabilities, age 18 – 59, as well as their families, communities, and governments. The Heritage Agency is one of six Area Agencies on Aging in Iowa that serve as a physical point of access to LifeLong Links, Iowa’s Aging and Disability Resource Center, and we offer services throughout the region.

Our staff is dedicated to educating professionals, employers, volunteers and community residents to meet the challenges that face older adults and their families in our ever-changing and aging world.

Mission

The Heritage Area Agency on Aging serves the needs of older adults, caregivers, their families and people with disabilities in the following ways:

- **Planning:** Developing and implementing plans that identify and meet the needs of older adults in our service area.
- **Funding:** Obtaining federal, state, and other (ie; grants, etc.) funding for older-adult programs.
- **Advocating:** Standing strong for older adults’ needs at the national, state and local levels.

Vision

- To secure and maintain maximum independence and dignity in a home environment for older persons capable of self-care with appropriate supportive services; and,
- To remove individual and social barriers to economic and personal independence for older persons.

Area Plan Goals

Each Area Agency on Aging in Iowa must complete an Area Plan that is prescribed by the Iowa Department on Aging (IDA). IDA uses these plans to create the state plan on aging. The Heritage Area Agency on Aging does work and service in addition to the Area Plan, however, our subcontractors are a large part of how the Area Plan goals are accomplished. Potential subcontractors need to be aware of these goals and address their ability to contribute through the RFP narrative. Taxonomies that are open for proposal that Heritage expects to have an impact on each goal are listed below to assist bidders to focus their narrative.

Goal 1 Iowa Aging Network will protect and enhance the rights; and prevent the abuse, neglect, and exploitation of older Iowans.

*The agency utilizes a combination of service provision, advocacy, and partnerships to protect and enhance the rights of older Iowans and to prevent their abuse, neglect and exploitation via **Elder Abuse Prevention & Awareness and Legal Assistance**.*

Goal 2 Iowa Aging Network will work with older Iowans, Iowans with disabilities, and caregivers as they fully engage and participate in their communities, make informed decisions, and exercise self-determination and control about their independence, well-being, and health.

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The agency utilizes a combination of service provision, advocacy, and partnerships to ensure older lowans, lowans with disabilities, and caregivers have appropriate and adequate information and referrals so that they are able to make informed decisions, and exercise self-determination and control about their independence, well-being, and health. Goal 2 will be accomplished via the following services: **LifeLong Links (Information & Referral/Access Assistance and Options Counseling), Nutrition Education, Nutrition Counseling, Outreach, Training & Education, and Caregiver Information Services.**

Goal 3 Iowa Aging Network will enable Older lowans to remain in their own residence and community of choice

The agency utilizes a combination of home and community-based service provision, advocacy, and partnerships to enable older lowans to remain in their own residence and community of choice with high quality of life for as long as possible. **Goal 3 will be accomplished via the following services: Case Management, Nutrition & Wellness Services (Congregate Meals, Home Delivered Meals, Evidence-Based Health Activities, Health Promotion & Disease Prevention), In Home Services, Community Based Services, Caregiver Services (Counseling and Respite Care) and Material Aid.**

Demographics

	60+ Total	%	60+ Minority*	%	60+ Poverty*	%	75+ Total	%	75+ Lives Alone	%
Benton	5,702	6.5%	26	1.1%	348	6.9%	2,013	7.1%	1,210	6.8%
Cedar	4,539	5.2%	31	1.3%	396	7.9%	1,617	5.7%	1,047	5.9%
Iowa	3,972	4.5%	39	1.7%	263	5.2%	1,536	5.4%	701	3.9%
Johnson	19,939	22.8%	782	34.0%	878	17.5%	5,577	19.6%	3,876	21.8%
Jones	5,161	5.9%	35	1.5%	418	8.3%	1,809	6.4%	1,048	5.9%
Linn	42,895	49.1%	1,278	55.6%	2,317	46.1%	13,865	48.7%	8,669	48.8%
Washington	5,218	6.0%	107	4.7%	402	8.0%	2,048	7.2%	1,229	6.9%
Heritage Region	87,426		2,298		5,022		28,465		17,780	

Source: U.C. Census Bureau, 2011-2015 American Community Survey Estimates

*Data has been generalized to 60+ Total Population using 65+ percentages.

Taxonomy Definitions

Adult Day Care/Adult Day Health	
Unit Measure	1 Hour
Definition	Provision of personal care for dependent adults in a supervised, protective, congregate setting during some portion of a twenty-four hour day. Services offered in conjunction with adult day care/adult day health typically include social and recreational activities, training, counseling, meals for adult day care, and services such as rehabilitation, medications assistance, and home health aide services for adult day health.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	Yes

Assisted Transportation	
Unit Measure	1 one-way trip
Definition	Provision of assistance, including escort, to a person who has difficulties (physical or cognitive) using regular vehicular transportation.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	Yes

Caregiver Respite	
Unit Measure	1 hour
Definition	Services which offer temporary, substitute supports or living arrangements for care recipients in order to provide a brief period of relief or rest for caregivers. Respite Care includes: (a) In-home respite (personal care, homemaker, and other in-home respite); (b) respite provided by attendance of the care recipient at a senior center or other nonresidential program; (c) institutional respite provided by placing the care recipient in an institutional setting such as a nursing home for a short period of time as a respite service to the caregiver; and (for grandparents caring for children) summer camps. If the specific service units purchased via a direct payment (cash or voucher) can be tracked or estimated, report those service unit hours. If not, a unit of service in a direct payment is one payment.
Available Funding Source	Title IIIE, Elderly Services
Registered Service	Yes

Chore	
Unit Measure	1 hour
Definition	Providing assistance to persons having difficulty with but not limited to one or more of the following instrumental activities of daily living: doing heavy housework, yard work, or sidewalk maintenance and home repair.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	Yes

Congregate Meals	
Unit Measure	1 meal
Definition	A meal provided to a qualified individual in a congregate or group setting. The meal as served meets all of the requirements of the Older American Act and State/Local laws. Meals provided to individuals through means tested programs such as Medicaid Title XIX Waiver Meals or other programs such as state-funded means tested programs are excluded from NSIP Meals. NOTE: A meal shall: (a) comply with the Dietary Guidelines for Americans (published by the Secretaries of the Department of Health and Human Services and the United States Department of Agriculture); (b) provide, if one meal is served, a minimum of 33 and 1/3 percent of the current Dietary Reference Intake (DRI) as established by the Food and Nutrition Board of the National Institute of Medicine of the National Academy Sciences; (c) provide, if two meals are served, together, a minimum of 66 and 2/3 percent of the current daily DRI, although there is no requirement regarding the percentage of the current daily DRI which an individual meal must provide, a second meal shall be balanced

	and proportional in calories and nutrients; and (d) provide, if three meals are served, together, 100 percent of the current daily DRI, although there is no requirement regarding the percentage of the current daily DRI which an individual meal must provide, <i>the</i> second and third meals shall be balanced and proportional in calories and nutrients.
Available Funding Source	Title IIIC, Elderly Services, NSIP
Registered Service	Yes

Home Delivered Meals	
Unit Measure	1 meal
Definition	A meal provided to an eligible consumer or other eligible participant at the consumer's place of residence. A meal which: (a) complies with the Dietary Guidelines for Americans (published by the Secretaries of the Department of Health and Human Services and the United States Department of Agriculture); (b) provides, if one meal is served, a minimum of 33 and 1/3 percent of the current Dietary Reference Intake (DRI) as established by the Food and Nutrition Board of the Institute of Medicine of the National Academy Sciences; (c) provides, if two meals are served, together, a minimum of 66 and 2/3 percent of the current daily DRI, although there is no requirement regarding the percentage of the current daily DRI which an individual meal must provide, a second meal shall be balanced and proportional in calories and nutrients; and (d) provides, if three meals are served, together, 100 percent of the current daily DRI, although there is no requirement regarding the percentage of the current daily DRI which an individual meal must provide, a second and third meal shall be balanced and proportional in calories and nutrients. Meals provided to individuals through means tested programs such as Medicaid Title XIX Waiver Meals or other programs such as state-funded means tested programs are excluded from NSIP Meals.
Available Funding Source	Title IIIC, Elderly Services, NSIP
Registered Service	Yes

Information & Assistance	
Unit Measure	1 consumer contact
Definition	A service for older individuals or individuals age 18 or older with a disability that (a) provides the individual with current information on opportunities and services available to the individual within his or her community, including information relating to assistive technology; (b) assesses the problems and capacities of the individual; (c) links the individual to the opportunities and services that are available; (d) to the maximum extent practicable, ensures that the individual receives the services needed by the individual, and are aware of the opportunities available to the individual, by establishing adequate follow-up procedures. NOTE: Information & Assistance is an individual, one-on-one contact between a service provider. An activity that involves a contact with several consumers or potential consumers (group services) should not be counted as a unit of I&A, instead it should be considered Training & Education. Per ACL guidance (4-5-16): ... <i>it is possible that the I&A provider might not know the exact age of callers / email users of I&A services. It is reasonable that the OAA-funded I & A provider would still serve these individuals [under age 60] & accordingly report such number of individuals served/units of service even though this is not the identified audience for OAA-funded I & A.</i>
Available Funding Source	Title IIIB, Elderly Services
Registered Service	Yes

Legal Assistance	
Unit Measure	1 hour
Definition	Provision of legal advice, counseling, and representation by an attorney or other person acting under the supervision of an attorney.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	No

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Nutrition Counseling	
Unit Measure	1 session per consumer
Definition	Provision of individualized advice and guidance to individuals, who are at nutritional risk, because of their health or nutritional history, dietary intake, medications use or chronic illnesses, about options and methods for improving their nutritional status, performed by a licensed registered dietician in accordance with state law and policy.
Available Funding Source	Title IIIB, Title IIIC, Elderly Services
Registered Service	Yes

Nutrition Education	
Unit Measure	1 session per consumer
Definition	A program to promote better health by providing accurate and culturally sensitive nutrition, physical fitness, or health (as it relates to nutrition) information and instruction to participants and caregivers in a group or individual setting overseen by a dietitian or individual of comparable expertise.
Available Funding Source	Title IIIB, Title IIIC, Elderly Services
Registered Service	Yes

Outreach	
Unit Measure	1 consumer contact
Definition	One on one interventions initiated by an agency or organization for the purpose of identifying potential consumers and encouraging their use of existing services and benefits.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	No

Transportation	
Unit Measure	1 one-way trip
Definition	Provision of a means of transportation for a person who requires help in going from one location to another, using a vehicle. Does not include any other activity.
Available Funding Source	Title IIIB, Elderly Services
Registered Service	Yes

Source: IDA Area Agencies on Aging Reporting Manual State Fiscal Year 2018

Registered Service – services that require collection and reporting of a detailed consumer profile

RFP Application Instructions

Application Requirements

The RFP application is a culmination of open services. Only one application needs to be submitted however, each taxonomy that is being proposed needs to have its corresponding section completed. For example, if an agency is proposing a Chore and Adult Day program, they only need to complete one RFP but will need to address all questions in the Chore and Adult Day sections. All other sections they are not applying for would be left blank.

Prior to starting the application, it is highly recommended the Applicant reviews these instructions in their entirety and also confirms they have at a minimum Adobe Acrobat Reader DC and Microsoft Office 2007 or newer.

To access the application:

1. Go to Heritage's website – <http://heritageaaa.org>
2. Hover over the Home tab and select Public Notices
3. Right click on the RFP Application and select either "save link as" or "save target as"
4. Select the location where you want the file to be saved
5. Close the internet browser
6. Open Windows Explorer and go to the location where the application was saved
7. Right click on the Application and select Open With > Adobe
8. The Applicant can now complete the fillable form
9. The Applicant can save the file and come back to it whenever needed.

Application Cover Page

- Top Section All items must be addressed
- Bottom Section Once the Applicant has determined which service(s) they propose to serve, they will need to determine if they will provide said service(s) region wide (all seven counties), county wide (F), or within a partial county (P). Place a checkmark to reflect service(s) and applicable service area(s).
- Input the number of units you propose to serve for each service in FY 2018 (based on the taxonomy definition)
 - Input the FY 2018 funding request
 - Confirm your ability to fulfill program match requirements of 25%
 - o The match value is automatically calculated

Section 1: General Information

- All items must be addressed
- Applicant's current Board of Directors roster with contact information – labeled as **Attachment #1**
- Applicant's Organizational Chart that shows key staff and volunteer positions – labeled as **Attachment #2**
- See the RFP checklist for the number of required copies

Section 2: Compliance

- Discrimination/Affirmative Action policy – labeled as **Attachment #3**
- Grievance Policy – labeled as **Attachment #4**

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- Emergency/Disaster Plan or Policies – labeled as **Attachment #5**
- Conflict of Interest Statement or Policy – labeled as **Attachment #6**
- Confidentiality Policy – labeled as **Attachment #7**
- See the RFP checklist for the number of required copies

Section 3: Program Information

- All items must be addressed for each service the Applicant is applying for
- If applicable, provide samples of screening tools the Applicant may have used or developed for participant eligibility and prioritizing service delivery to funding limitations and label as **Attachment #8 – applicable taxonomy**.
- See the RFP checklist for the number of required copies

Section 4: Budget

Items to consider before completing the Budget Forms

- Complete a detailed budget for each taxonomy you are applying for using the provided excel template titled RFP Budget Forms.
- The Heritage projected revenue on the budget forms must match the requested funding amount on page 1 of the application.
- An itemized detail of revenues and expenditures are required
- “Zero Balance” budgets are a must for OAA revenues. OAA projected program revenues must equal projected program expenditures.
- Include the non-cash fair market value of all third party in-kind resources and expenditures, such as donated equipment, premise, supplies, or services of individuals.
- Applicants who receive funding from Heritage are required to provide 25% matching funds. The required match is calculated on page 1 of the application packet and also on the Budget Summary of the budget forms. The 25% match requirement for the purpose of this request for proposal is defined as **cash and the fair market value of non-cash third party in-kind resources** used to support the Applicant’s share of the program expenditures.

Cash includes other state, local public funds, other local cash, and program income (voluntary contributions).

The fair market value of non-cash third party in-kind contributions include resources such as donated equipment, space, supplies, services, goods, volunteer support, or other support.

To qualify as match, the allowable match funding must be expended in the same service as the funding to be matched. For example, voluntary contributions received from a Home Delivered Meal cannot be used for the match requirement for Transportation. Other Federal Funds cannot be used to match OAA funds.

The following is an example of how to correctly calculate required match:

Older American’s Act funding requested	\$10,000.00
Divide OAA requested funding by 75% (.75)	<u>÷ 75% (.75)</u>
	\$13,333.33

Total amount of service to be delivered	\$13,333.33
Subtract OAA funding requested	<u>-\$10,000.00</u>
Amount of Match Funding required	\$3,333.33

This calculation is to be used to determine Required Match Funding for all services.

- Heritage will not reimburse Applicants at a rate higher than the Applicant's established Governmental or Private Pay Rates.
- See the RFP checklist for the number of required copies

XXX – Detailed Data tab (xxx denotes the taxonomy)

Section 1: Volunteer Support

- Provide the estimated number of volunteer hours to support the applicable taxonomy.
- Please use the rate supplied.
- Do not edit the amounts/formulas in the Rate/Hour and Value columns. Please ensure formula accuracy.

Section 2: Personnel Detail

- Provide personnel detail by position and work location for all the agency's or program's regular and temporary employees. Required information includes hours per day, days per week, hourly wage, employer paid insurance and retirement (if offered). Do not include fees paid to consultants or contract fees.
- Do not edit the formulas in the Total Annual Salary, FICA and Total Salary & Benefits columns. Please ensure formula accuracy.
- Please add additional rows if necessary.

Section 3: Route Delivery Mileage Detail

- All mileage related to the delivery of service, please provide detail
- Mileage reimbursement shall not exceed the IRS Standard Mileage Rate of \$0.54 per mile (as of 1/4/17)

Section 4: Other Mileage Detail

- All mileage related to the organizations management of the program (for example: site managers meetings, conducting or attending meetings, etc.), please provide detail
- Mileage reimbursement shall not exceed the IRS Standard Mileage Rate of \$0.54 per mile (as of 1/4/17)

Section 5: POS Rates

- Identify any public purchase of service or contracted rates that your agency has in place for FY 2017 (i.e. Private Pay, Public Health, VA, LTC insurance, etc).
- Funding Source Name
 - List the funding source that correlates you're your agency's contracted/established rates.
- POS/Contracted/Private Pay Rate
 - List the negotiated rate of reimbursement for various funding sources.
- Unit Measure

- The unit of measure for the identified POS/Contracted/Private Pay Rate (i.e. ½ hour, 1 hour, 1 day, etc).

XXX – Detailed Data tab (xxx denotes the taxonomy)

The Applicant will be responsible for completing the tan colored cells. The procedures below will aid in the completion of the requested data.

Revenues

- Heritage
 - The total amount of funding requested from Heritage. If completing a budget for Nutrition, it is required the amount be broken out between Home Delivered and Congregate Meals.
- Other Federal
 - Funds received from other Federal agencies or the United States government. (non-Medicaid dollars).
- Other State
 - Funds received from other State agencies such as the Iowa Department of Public Health or the Iowa Department of Transportation. This does not include Medicaid funds received through the Iowa Department of Human Services.
- Local Public Funds
 - Funds generated from taxes established by local taxing bodies such as County Boards of Supervisors, City Councils, and Area Community Colleges. Funds received by the city, county or counties in which the Applicant or program operates.
- Other Local Cash
 - Funds from charitable organizations, such as United Way, private foundations, gifts, bequests, and donations from individuals.
- Program Income
 - Grant related income or gross income earned by the Applicant from activities, part or all of the cost of which is borne as a direct cost by a grant, or counted as a direct cost toward meeting a cost sharing or matching requirement of a grant, such as fees for services performed during the grant. General contributions which the agency keeps; i.e. voluntary contributions, personal memberships, proceeds from the sale of tangible property, usage or rental fees, and patent or copyright royalties.
- Medicaid Managed Care
 - Funds received from the MCO's.
- Non-Cash Revenues
 - Volunteer Support – formula from Detailed Data tab
 - All other in-kind resources – the fair market value of all third-party in-kind resources such as donated equipment, space, supplies and services of individuals etc.
- Total Revenues
 - The sum of all itemized revenues attributable to the program.
- Minimum match requirement

- The sum of Applicant's required match. This amount should equal the match amount on page 1 of the application.

Expenditures – Direct Costs (For Nutrition Only)

- Input the projected number of meals the Applicant anticipates serving, paying attention to the type of meal listed.
- Input the cost per meal for both supplies/packaging and raw food, paying attention to the type of meal listed.
- The gray cells will automatically populate the correlated expenses.

Expenditures – Indirect Prorated (For Nutrition Only)

- Row 38 represents a proration percentage based on the type of meal and the anticipated number of meals. This percent will then be used to calculate the applicable program expenses below.

Section: Personnel

- Salaries – formula from Detailed Data tab
- Employer Paid Insurance – formula from Detailed Data tab
- FICA – formula from Detailed Data tab
- Retirement – formula from Detailed Data tab
- Workmen's Compensation
 - Amounts paid by employer to cover workmen's compensation insurance.

Section: Premise

- Garbage
 - Costs to remove/dispose of garbage
- Insurance
 - All costs of insurance except employee benefits and other payroll related insurance. This includes general liability insurance, professional liability insurance, D & O insurance, etc.
- Laundry
 - Costs of nutrition program-related laundry services.
- Occupancy/Utilities
 - Costs to agency or program for occupying owned or leased land, buildings and/or offices
- Telephone/Internet
 - Expenses related to telephone and internet utilized by program staff to implement the program and comply with Heritage reporting.

Section: Professional Fees/Dues

- Professional Fees
 - Professional fees and expenses of professional consultants and practitioners who are not employees of the organization
- Dues
 - Amounts paid for memberships in other organizations that provide benefits and services

Section: Travel/Meetings

- Route Delivery Mileage – formula from Detailed Data tab
- Program Management Mileage – formula from Detailed Data tab

Section: Equipment

- Purchase

- Cost of purchasing equipment
- Rental or Lease
 - Cost of renting or leasing equipment
- Maintenance
 - Cost of maintaining equipment

Section: Supplies

- Program Supplies
 - Includes the cost of materials related to program activities (including kitchen supplies for the nutrition program)
- General Supplies
 - Includes the cost of materials related to general office supplies

Section: Other

- Outreach
 - Costs of marketing and advertising program
- Postage
 - Postage, parcel post, trucking and delivery costs
- Printing
 - Costs of printing program related materials
- Advertising
 - The amount of money spent on marketing
- Admin/Indirect
 - Expenditures related to the day-to-day operations of a business. General and administrative expenses pertain to operation expenses rather than to expenses that can be directly related to the production of any goods or services

Total Expenditures – The sum of all itemized expenditures attributable to the program

The sum of Match will be carried down from the revenues section to offset the expenditures. The “Net Program Surplus (Deficit) must be zero (\$0) for the OAA program.

Cost per Meal – formula based on the sum of expenditures and the number of proposed units

Expenditures – For Non-Nutrition Programs

*****Once the expenditures are inputted into column B, the Applicant will need to break them out/allocate based on their funding stream. Please ensure formula/data input accuracy. The sum of columns C thru G should total to column B.*****

Section: Personnel

- Salaries – formula from Detailed Data tab
- Employer Paid Insurance – formula from Detailed Data tab
- FICA – formula from Detailed Data tab
- Retirement – formula from Detailed Data tab
- Workmen’s Compensation
 - Amounts paid by employer to cover workmen’s compensation insurance.

Section: Premise

- Garbage
 - Costs to remove/dispose of garbage
- Insurance

- All costs of insurance except employee benefits and other payroll related insurance. This includes general liability insurance, professional liability insurance, D & O insurance, etc.
- Laundry
 - Costs of nutrition program-related laundry services.
- Occupancy/Utilities
 - Costs to agency or program for occupying owned or leased land, buildings and/or offices
- Telephone/Internet
 - Expenses related to telephone and internet utilized by program staff to implement the program and comply with Heritage reporting.

Section: Professional Fees/Dues

- Professional Fees
 - Professional fees and expenses of professional consultants and practitioners who are not employees of the organization
- Dues
 - Amounts paid for memberships in other organizations that provide benefits and services

Section: Travel/Meetings

- Route Delivery Mileage – formula from Detailed Data tab
- Program Management Mileage – formula from Detailed Data tab

Section: Equipment

- Purchase
 - Cost of purchasing equipment
- Rental or Lease
 - Cost of renting or leasing equipment
- Maintenance
 - Cost of maintaining equipment

Section: Supplies

- Program Supplies
 - Includes the cost of materials related to program activities (including kitchen supplies for the nutrition program)
- General Supplies
 - Includes the cost of materials related to general office supplies

Section: Other

- Outreach
 - Costs of marketing and advertising program
- Postage
 - Postage, parcel post, trucking and delivery costs
- Printing
 - Costs of printing program related materials
- Advertising
 - The amount of money spent on marketing
- Admin/Indirect
 - Expenditures related to the day-to-day operations of a business. General and administrative expenses pertain to operation expenses rather than to

expenses that can be directly related to the production of any goods or services

Total Expenditures – The sum of all itemized expenditures attributable to the program

The sum of Match will be carried down from the revenues section to offset the expenditures. The “Net Program Surplus (Deficit) must be zero (\$0) for the OAA program.

Cost per Unit – formula based on the sum of expenditures and the number of proposed units

Due Date

RFP Applications, including required attachments and copies, must be delivered to the office of The Heritage Area Agency on Aging, East Building, Kirkwood Community College main campus, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404 (or mailed to and received by The Heritage Area Agency on Aging, 6301 Kirkwood Blvd. SW, Cedar Rapids, Iowa 52404) by 12:00 p.m. (Noon) on Thursday, February 16, 2017. Electronic copies must also be sent to and received by kelliott@kirkwood.edu by 12:00 p.m. (Noon) on Thursday, February 16, 2017.

Submission

Incomplete RFPs or those with gross errors will not be considered. Applications may be returned for correction, possibly delaying or causing an Applicant to be ineligible for funding. HAAA staff will not make corrections or “guesses” on behalf of Applicants.

Applicants must address all of the questions and topics using the format provided. Applications that have had questions removed or altered will be returned.

There is no minimum or maximum word limit in responding to questions. It is critical that responses answer the questions asked completely and demonstrate the complete proposal for the program.

RFP Checklist

Required Attachments with Application Submission

When submitting the application packet, please provide Heritage with one original and nine (9) copies, two (2) copies of the compliance packet, all three hole punched. An electronic copy of all required forms must also be emailed to kelliott@kirkwood.edu by the due date and time. The electronic copy needs to be sent in the format it was completed. Do not print, scan, and convert to pdf. Make sure all attachments are clearly marked.

Application Packet – (One (1) Original & Nine (9) copies of each document/attachment, appropriately labeled and three hole punched).

- Completed RFP Application
- Attachment #1: Board of Directors
- Attachment #2: Organizational Chart
- Attachment #8: Samples of Screening Tools for Participant Eligibility for each taxonomy
- Budget – Detailed Data tab for each taxonomy
- Budget – Budget Summary tab for each taxonomy

Compliance Packet (Two (2) copies of each attachment, appropriately labeled and three hole punched)

- Attachment #3: Discrimination/Affirmative Action policy
- Attachment #4: Grievance Policy
- Attachment #5: Emergency/Disaster Plan or Policies
- Attachment #6: Conflict of Interest Statement or Policy
- Attachment #7: Confidentiality Policy

The RFP application and supporting documentation is due no later than
12:00 p.m. (Noon) on Thursday, February 16, 2017

Review process and Scoring

The contract(s) will be awarded to a responsible bidder(s) whose proposal is determined to be most advantageous to the program's vision, cost effectiveness, and Heritage. Applicants are strongly encouraged to consider Heritage's Mission, Vision, and Area Plan Goals when responding to this RFP.

Applications are first reviewed for accuracy and scored by a Review Team that consists of Kirkwood Community College/Heritage staff and volunteers.

The Planning, Program and Budget committee of the Heritage Advisory Council will review the Applications and make recommendations to the Heritage Advisory Council. Upon approval of the Heritage Advisory Council, Kirkwood Community College Board of Trustees (or their designee) will review with the Heritage Executive Director. Final judgment in determination rests within the legal relationship and structure of The Heritage Area Agency on Aging/Kirkwood Community College organizational oversight and departmental agreement.

All significant evaluation factors and their relative importance are included in this packet. Proposals will be scored by a Review Team and reviewed by volunteer leadership described through a point system. Reviewers will assign points to each section based on the quality of the answer. Total points available are 100 with a minimum of 60 points to move forward for consideration.

Scoring Rubric

Each proposal accepted for review will be evaluated and scored using the following criteria:

Category	Points Available	Scoring Methodology	Points Awarded
Complete Proposal (including attachments)	20	<p>20 = Exemplary and complete. Purpose of the document is clear, well-structured and thorough. No errors in document.</p> <p>10 = Adequate and needs improvement. Purpose of the document is somewhat clear and has a few areas that need additional supporting information. 1-3 errors in document.</p> <p>0 = Poor and incomplete. Items and attachments missing. Document is unclear and incomplete. Offers several errors in document.</p>	
Section 1: Agency Information <ul style="list-style-type: none"> • Overview of Applicant (5 pts.) • Applicant Organizational Structure (5 pts.) • Financial Stability & Program Impact (5 pts.) • Partners in the Aging Network (5 pts.) • Outreach (5 pts.) 	25	<p>25 = Exemplary and complete. Strong and fully explained and left reader with no questions about organization, organization's capabilities and history of financial stability. Clear staffing structure and vast program partnerships and supporters. Demonstrated level of commitment to outreach to participants.</p> <p>12 = Adequate and needs improvement. Information was readable, left reader unclear information related to experience of Agency structure, capabilities and/or financial stability. Need to build partnerships, program structure and outreach plan.</p> <p>0 = Poor and incomplete. Left reader with numerous questions, concerns, missing data points. Did not describe level of management or provide information about staffing, and partnerships. Does not demonstrate financial stability nor plan to expand program through outreach.</p>	

Category	Points Available	Scoring Methodology	Points Awarded
<p>Section 3: Program information</p> <ul style="list-style-type: none"> • Proposed Strategies for Service Delivery (15 pts.) • Expectations of Staff and Training (15 pts.) 	30	<p>30 = Exemplary and complete. Strong and fully explained and left reader with clear information about proposal. Innovative program with clearly linked project to goals of Area Plan. Used data to support proposed program. Program sustainable. Staff clearly trained and offers no vacant positions. Shows ability to expand program and past successful initiatives.</p> <p>15 = Adequate and needs improvement. Proposed project left reader with needing supportive information. Some areas not properly explained. Some staffing positions yet to be determined or filled or left reader questioning expertise of staff. Places focus on program need but does not visibly have programmatic structure, composition and ability to expand outreach. Has limited ability with successful initiatives.</p> <p>0 = Poor and incomplete. Program is vague and unclear. Project/plan has no structure and is deficient in staff expertise and knowledge, vague goals for service delivery and not capable to offer expansion or innovation. No has no prior experience with past successful initiatives.</p>	
Section 4: Budget	25	<p>25 = Exemplary. All formulas are correct. Cost effective. Exceeds match requirement. Proven diversified funding. Provides reasonable and necessary expenditures for the plan. Shows no overextending of units or under projecting of units and program narrative supports this.</p> <p>12 = Adequate. Complete, but reader was left with questions about cost and associated budget line items. Provides most of the reasonable and necessary expenditures. Meets match requirement. Identifies areas and explains excessive expenditures. Program narrative and budget may not support one another or leaves reader questioning this.</p> <p>0 = Poor. Budget lacks required information or includes unallowable expenses. Expenditures are unreasonable or unnecessary or leaves reader to make assumptions. Errors exist and does not meet minimum match requirement.</p>	
Total Score	100		