



**REQUEST FOR PROPOSAL (RFP)**

**RFP: 003-21**

**TITLE III-D OF THE OLDER AMERICANS ACT: Evidence-Based Health Education  
Wellness Programs**

**Council on Aging of Southwestern Ohio  
175 Tri County Parkway  
Cincinnati, Ohio 45246**

**Proposal Due Date: May 14, 2021**

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## Section One: GENERAL INFORMATION

### Bid Overview

Council on Aging of Southwestern Ohio (COA) is Ohio's designated Area Agency on Aging (AAA) serving seniors in Butler, Clermont, Clinton, Hamilton, and Warren counties. In this capacity, COA receives Title III-D Older Americans Act funds from the Ohio Department of Aging to provide evidence-based health education Wellness Programs to seniors in our 5-county region. Title III funded services are generally available only to individuals 60 years of age and older, unless otherwise specified in the Older Americans Act (OAA), or state policy. The Ohio Department of Aging currently holds the license for the Area Agencies on Aging to use to conduct Healthy U Programs owned by The Self-Management Resource Center (SMRC). MaineHealth owns the Steady U Programs and provides licenses to each organization.

Currently COA operates the Wellness Programs through a hybrid model. In this hybrid model, COA provides the program oversight and management and is responsible for program performance. The programs are facilitated with the help of community host sites and community volunteer leaders. Our Wellness Programs are available in-person, online and by phone.

COA is seeking one organization to be the administrative entity for the Wellness Programs and therefore assuming responsibility for program oversight, management, and performance in our 5-county region. Our program year begins on October 1, 2021 and ends on September 30, 2022. The selected entity will contract with COA effective October 1, 2021. This is a one-year contract due to expire on September 30, 2022 with no opportunity for renewal. The federal Title III funds available to provide program oversight, management and performance is \$89,900 for the program year. This Title III funding requires matching funds. The sub-recipient is responsible for providing the match funding of \$22,300. This program is dependent on funding and will end immediately upon notification that funding is not available.

The goal of this RFP is to attract the highest quality providers for the lowest cost who can meet the requirements and demand for services in each county in the AAA-1 Service area which includes Butler, Clermont, Clinton, Hamilton and Warren Counties.

All Bidders must meet the Service Specifications, and all terms and conditions within this document, including appendices and attachments, if selected to receive a Contract. Please read this document in its entirety.

### Important Dates

Request For Proposal Number	Proposal Name
RFP: 003-21	Title III-D Evidence-Based Health Education Wellness Programs
Important Dates	
Bidders Conference (Optional)	Wednesday, April 28, 2021 at 1:00 p.m.
Last Day to Submit Questions	May 3, 2021
Last Day for COA to Answer Questions Submitted	May 7, 2021
Proposal Due Date	Friday, May 14, 2021 @ 12pm EST
Estimated Award Date	July 16, 2021
Contract Start Date	October 1, 2021

All questions regarding the RFP must be put in writing and submitted to:

[provider\\_services@help4seniors.org](mailto:provider_services@help4seniors.org)

Submitted questions must reference: **RFP: 003-21 Title III-D Program**

Only questions submitted in writing to this e-mail address will receive a response. All questions must be submitted no later than May 3, 2021. Responses to questions submitted will be posted on COA's website at <https://www.help4seniors.org/Service-Providers/Title-III/Title-III-Requests-Proposals.aspx> no later than May 7, 2021.

### **Bidders Meeting**

A virtual, online Bidders Conference regarding this RFP will be held **Wednesday, April 28, 2021 at 1:00 p.m.**

COA will conduct a bidders meeting to review the RFP and answer questions from prospective applicants. We recommend a member of the prospective applicant's administrative staff and the person who will be preparing the proposal attend this meeting. Attendance at the bidders meeting is not required to submit a proposal for this RFP.

Anyone interested in learning more about this RFP should send an email of interest to [provider\\_services@help4seniors.org](mailto:provider_services@help4seniors.org). An email link to the Bidders Conference then will be sent to the inquiring Bidders. **Emails of interest to attend the Conference must be received no later than Tuesday, April 27, 2021.**

### **Proposal Delivery**

Each submission must include **one (1) signed original, (1) copy, and one (1) flash drive** containing an electronic version (\*.doc or \*.pdf) of the original proposal document with all responses and forms scanned as a single document. For confidentiality purposes, on the electronic version, financial information can be marked "proprietary" or "confidential," scanned, and included as a separate file. **All bids must be received no later than NOON Eastern Standard Time on Friday, May 14, 2021.** Bids may be submitted by hand, via delivery service, or via United States mail. The bidder is responsible for ensuring the bid arrives at COA's office prior to the submission deadline. Bids must be sent to:

Council on Aging of Southwestern Ohio  
Attention: Randy Quisenberry  
175 Tri County Parkway  
Cincinnati, Ohio 45246

**No late Bids will be accepted.** COA is not responsible for and will not open or consider Bids arriving after the deadline because of missed delivery, improper address, insufficient postage, accident, or any other cause. **COA's building is open to receive bids from 8:00 A.M. to 12:00 P.M., Monday, Wednesday, and Friday.**

## **Integrity of the Procurement Process**

During the procurement process, bidders interested in responding to the solicitation may submit questions via email only to the Provider Services team regarding procedural matters related to the RFP, or requests for clarification or modification of this solicitation, no later than the due date and time as set forth in the RFP. Questions or requests submitted after the due date and time will not be answered.

Prospective service providers shall not contact any Council on Aging personnel (with the exception of the Provider Services team), board or advisory council members, or program funders, including elected officials, for meetings, conferences, or discussions that are specifically related to this RFP at any time prior to any Notice of Intent to Award a contract. Unauthorized contact with any Council on Aging personnel, board or advisory council members, or its funders, including elected officials, may be cause for rejection of the vendor's proposal.

## **Agency and Program Background**

COA was established in 1970 and was incorporated as a nonprofit agency in December 1971. In 1974, COA was designated by the Ohio Commission of Aging, now the Ohio Department of Aging (ODA), as the Area Agency on Aging (AAA) for Butler, Clermont, Clinton, Hamilton, and Warren counties. These five counties comprise Planning and Service Area Number 1 (PSA-1) in the State of Ohio.

COA receives Title III funds through the Older Americans Act of 1965, as amended (42 U.S.C.A. § 3001 et seq.) and State of Ohio Senior Community Services State Subsidy Funds (state block) to advocate for older adults and help them remain in their own homes and communities. The allocation of such funds to Area Agencies on Aging is based upon the population and needs of persons 60 years of age and over in each Planning and Service Area.

COA, providing service to older adults for 50 years, is Southwestern Ohio's AAA. Our mission: Enhance lives by assisting people to remain independent through a range of quality services. These include advocacy, caregiver support, counseling, health promotion, home and community-based services, legal assistance, nutrition, senior centers, and transportation.

ODA is a unit of State government designated as the focal point on issues concerning older persons. This designation is required by the Older Americans Act. ODA performs a wide variety of functions intended to provide opportunities to help older persons remain independent in their own homes and communities. These functions range from overall administration of the network of Area Agencies on Aging, to services and systems development which strengthen the statewide program. ODA administers the PASSPORT and Assisted Living Medicaid Waiver programs, which is designed to divert Medicaid eligible nursing home residents to cost effective community care options.

## Section Two: PROGRAM OVERVIEW

### Program Details

- A. Our evidence-based health education wellness programs are provided through recurring workshop sessions over a 6, 7- or 8-week period. Through the Healthy U program, we offer three different self-management workshops. In-person workshops meet once a week for 6 consecutive weeks for 2 ½ hours each week. Online workshops meet for 7 consecutive weeks for 2 ½ hours. Phone workshops meet for 6 consecutive weeks for one hour.
- i. Diabetes Self-Management Program (in-person, online and phone)
  - ii. Chronic Disease Self-Management Program (in-person, online and phone)
  - iii. Chronic Pain Self-Management Program (in-person, online and phone)

Through the Steady U program, we offer A Matter of Balance Program which focuses on falls prevention. This workshop is available in-person and online. The in-person workshop meets one time weekly for 8 consecutive weeks for 2 hours. The online workshop meets for 9 weeks.

- B. The Administrative Entity must have a relationship with certified Master Trainers for Healthy U and Steady U Programs (2 for each program). This relationship can be through direct employment or contract. COA currently utilizes both relationship types to obtain Master Trainer services. Master Trainers become certified by SMRC and/or Maine Health. Master Trainers must comply with ongoing certification activities and file annual reports with their respective programs. Master Trainers are responsible for sharing program changes and updates with the administrative entity and for providing ongoing training for Volunteer Leaders. Master Trainers are responsible for training new Volunteer Leaders and providing fidelity monitoring for all workshops. Fidelity monitoring is mandatory and ensures that program fidelity continues with each evidence-based health education workshop. Fidelity monitoring activities are reported through the Administrative Entity to COA to ODA.
- C. The Administrative Entity must have a relationship with Volunteer Leaders. Volunteer Leaders are certified to facilitate workshops. This relationship can be through direct employment, contract, or agreement. COA currently utilizes both employment and agreements with community members to provide enough Volunteer Leaders to facilitate community workshops in our 5-county region. These self-management workshops are intended to be facilitated by non-professional community members who have either diabetes, a chronic condition or chronic pain and because of their health condition can successfully facilitate a self-management program of peers by sharing their own personal health experiences. Volunteer Leaders go through training and are certified to facilitate workshops. In-person and online workshops require two Volunteer Leaders. Phone workshops require one Volunteer Leader. The title 'Volunteer Leader' is misleading as most Volunteer Leaders receive some sort of financial compensation (earnings or stipend).
- D. The Administrative entity is responsible for the initial and ongoing training and related expenses to maintaining Master Trainer and Volunteer Leader certification for all the individuals in these roles. This includes registration fees, training materials and travel.

- E. The administrative agency is responsible for providing an online platform that is available for Master Trainers, Volunteer Leaders, and participants to access workshops. The administrative agency is responsible to provide a conference call line for phone workshops.
- F. The administrative agency is responsible for providing an online, senior-friendly registration platform and a centralized phone number for interested participants to call and register for workshops. This registration platform must have security settings that safeguard participant's information and keep it confidential.
- G. The administrative agency is responsible for assisting seniors in understanding basic functionality of their smart devices to make sure they can access the workshop platform and conduct basic functions like using the video and microphone, raising your hand, and using the chat function.
- H. Workshops are free to participants. The Title III-D funding will cover the cost of participant workshop materials which are a combination of a book, workbook, CD, homework handouts, and surveys. The cost of the workshop materials will range from approximately \$20 - \$60 per participant depending on the type of workshop, platform and mailing costs.
- I. The Administrative Entity is responsible for recruiting host sites in each of the 5 counties in our region. Host sites must provide facility space for in-person workshops. The size of the space must be appropriate for the workshop size and the building must be ADA compliant allowing all seniors an opportunity to participate. The host site is responsible for providing adequate and safe parking space. The Administrative Entity is responsible for making sure the host site meets these standards. Some community host sites will provide facility space for free and others will expect payment for use of space.
- J. The Administrative Entity is expected to partner with host sites in the 5-county region. The expectation is the Administrative Entity will have a minimum of host sites in each county as described below. This is a performance measure.
  - i. Butler County – 3 host sites
  - ii. Clermont County – 2 host sites
  - iii. Clinton County – 1 host site
  - iv. Hamilton County – 8 host sites
  - v. Warren County – 2 host sites
- K. The Administrative Entity is expected to assist host sites with marketing and advertising workshops. While the host site will focus primarily on recruiting their members, the Administrative Entity is expected to advertise in the community or region. When a workshop is facilitated in-person, the Administrative Entity should advertise in the surrounding community to recruit participants that can travel a short distance to participate. When the workshop is facilitated online or by phone, the Administrative Entity should recruit throughout the 5-county region as any senior can join an online or phone workshop.
- L. Program performance is based on the number of workshop completers. A completer is a participant that completes 4 or more workshop sessions in a 6 – 7 session workshop or a participant who completes 5 or more sessions of an 8-session workshop. The performance goal is for 77% of workshop participants to be completers.
- M. Another performance goal is to balance the cost of the program against the number of completers to get a reasonable per-person program cost. This reasonable cost will be negotiated in the contract.

- N. The Administrative Entity will provide a Certificate of Completion for each completer. Some participants will want to give a copy of their certificate to their primary care physician or their insurance company.
- O. The Administrative Entity is responsible for collecting all participant, workshop, Leader, Master Trainer and fidelity activity information related to the Wellness Programs that is required of the Ohio Department of Aging. This information is due to COA by the 10th of each month.
- P. The administrative entity is required to have a HIPAA compliant process for participant data collection and storage.
- Q. Financial reports are due to COA by the 10th of each month to include financial actions from the prior month.
- R. All messaging about Wellness Programs must include the partnership between the Administrative Entity and COA.
- S. COA reserves the right to do program and fiscal monitoring at any time during the contract period.
- T. Any unused funds will be returned to COA at the closure of the program year.
- U. COA expects the Administrative Entity to retain records for 3 years.

#### **Funding Information and Non-Federal Match**

Title III and State fund agreements are maximum award agreements in that the amount awarded by COA represents the maximum funding amount that your agency will be compensated for that proposed service for the contract year. All agencies will be compensated based on units of service as reported to COA utilizing Wellsky Aging & Disability System. All unit reimbursement rates may be subject to a unit cost cap established by COA.

The contract between COA and the Provider ("Agreement") will be October 1, 2021 through September 30, 2022, or such earlier time as may be agreed, or as may be indicated elsewhere within this RFP, or in the contract awarded to the selected bidders. The Agreement will be in substantially the form of Appendix B to the RFP, with such changes as may be deemed necessary by COA. Funding will be awarded at COA's sole discretion based on, but not limited to provider performance, available funding, program requirements and priorities, consumer needs, changing market conditions, changes in the law regulating the goods or services the agreement covers, and alignment with COA's Mission and Vision.

#### **Service Guidelines**

Bidders are required to provide services in accordance with Section Two: Program Overview of this RFP and Attachment 4 – Evidence-Based Health Education Wellness Programs in order to contract with COA. Bidders will describe compliance with the service specification for the proposed service listed in the 2<sup>nd</sup> Level Evaluation Section 4 of this RFP.



## Section Three: PROPOSAL SUBMISSION REQUIREMENTS

A complete bid proposal includes the following:

**1) Proposal:**

- ☐ **One (1) signed original, (1) copy and one (1) flash drive** containing an electronic version (\*.doc or \*.pdf) of the original proposal document with all responses and forms scanned as a single document

**2) Required Forms & Documentation**

- ☐ Budget Worksheets (**Attachment One**)
- ☐ Service/Rate Request Form (**Attachment Two**)
- ☐ Bidder's Information Form (**Attachment Three**)
- ☐ Bidder's Certification of Payment of Personal Property Tax (**Attachment Three**)
- ☐ Debarment, Suspension, Ineligibility and Exclusion Certification (**Attachment Three**)
- ☐ Non-Collusion Affidavit (**Attachment Three**)

**3) Go/No Go Documentation: Financial Stability, Insurance, Workers' Compensation**

- ☐ Certificate of Secretary of State (current and in good standing)
- ☐ Current Bureau of Workers' Compensation Certificate
- ☐ Certificate of Insurance evidencing the Bidder's liability meets the proper requirements
- ☐ DUNS number or CAGE number from the System for Award Management Database (SAM). COA is prohibited from entering into an agreement with any provider the SAM database lists as excluded or disqualified from agreements involving federal funds. "SAM database" means the general service administration's "System for Award Management," which is available to the general public for free on <https://www.sam.gov/SAM/#>. Bidders are required to complete the free registration and denote either their DUNS number **or** CAGE number on the Bidder's Information Form (**Attachment Three**).

Financial Analysis:

- ☐ Prior year financial statements (Income and Balance Sheet)
- ☐ Most recent independent audited financial statements – if unavailable, most recent unaudited financial statements certified as being true and correct by the Chief Financial Officer of the Bidder
- ☐ Most current interim financial statements. If financial statements are unavailable, provide:

- Prior year's tax return (All Schedules)
- Prior year's statement of Revenue & Expense

- ☐ A/P Aging (classified in 30, 60, 90 days past due)
- ☐ Dated statement from a contracted CPA or an internal officer confirming that all federal, state, and local income and employment tax payments are current and paid through the most recent tax year.

**4) Evaluation Responses:**

- ☐ Experience providing evidence-based health education programs
- ☐ Targeting, response
- ☐ Community Focal Point Worksheet (**Attachment Six**)
- ☐ Technology, response
- ☐ Business Operations, response
- ☐ Program Performance Measures

## **Section Four: PROPOSAL EVALUATION**

COA shall award a contract to the Bidder who submits the best Bid proposal based upon evaluation of all Bids as determined by COA, in its sole discretion.

COA reserves the right to reject any or all Bids, any part or parts of any Bid, and also the right to waive any informality in any Bid. Any Bid which is incomplete, conditional, obscure, or which contains additions not requested, or irregularities of any kind may be rejected.

COA reserves the right to make changes in program requirements, procedures, and terms after the Bids have been submitted, opened, and reviewed in order to maximize delivery of services consistent with the objectives of the Title III Program.

COA reserves the right to apply any of the following, if warranted, in COA's sole opinion:

- Negotiate price
- Establish a ceiling rate for services
- Award to multiple providers
- Eliminate any term or condition that is not advantageous to COA, its clients, or funders

Bid proposals will be evaluated based on Bidder's (1) Financial Analysis and Stability, Certificate of Insurance, and Workers Compensation Certificate (2) The Organization and Capabilities, Quality and Service Delivery, and (3) Pricing. The first category evaluation determines if the proposal meets the requirements of the RFP and the organization is financially stable. Bidders not meeting the first category evaluation criteria may not be considered further. The second category evaluation is for organization capabilities, quality, service delivery and compliance with service specifications. The third category evaluation is based on Pricing.

### **Selection**

COA will form a review committee made up of representatives from various functional areas within the organization and external stakeholders. This review committee will base its recommendation on the evaluation criteria set forth in this RFP. The committee will conduct an initial evaluation based on information in the agency proposals.

### **COA's Intentions for Award**

It is our intent to award this contract to the Bidder's proposal that has:

1. Passed the 1<sup>st</sup> Level Evaluation: "Go/No Go",
2. Contains all Proposal Submission Requirements; and
3. Received a high score in the 2<sup>nd</sup> Level Evaluation: The Organization, Capabilities and Service Delivery; and
4. Pricing Analysis

## Scoring of Submissions

The committee will base the evaluations on the following criteria:

Description	Evaluation Criteria
1 <sup>st</sup> Category Evaluation - Go/No Go Criteria	Submitted Documentation
2 <sup>nd</sup> Category Evaluation – The Organization, Capabilities, and Service Delivery	Maximum Score is 95 points. Responses are rated from 0-10. Responses indicating ‘No’ or no experience, process, policy, or no documentation attached = 0 points Responses that are partial or related = 5 points
3 <sup>rd</sup> Category Evaluation – Pricing	Completed service/rate sheet (Attachment 2) and pricing is competitive with other proposals

### 1<sup>st</sup> Level Evaluation: GO/NO GO CRITERIA

These are YES/NO criteria. Any submission with 1 or more “NO” answers will be discussed with the review committee to determine if further evaluation will be afforded or granted.

Number	Category	Examples for Scoring	Rating
1. Financial Stability, Insurance, Workers’ Compensation	Provide prior year’s tax return (including schedules), prior year’s statement of revenue and expenses, and a balance sheet. Dated statement from a contracted CPA or an internal officer confirming that all federal, state, and local income and employment tax payments are current and paid through the most recent tax year. Provide Certificate of Insurance evidencing Bidder’s liability insurance meets requirements. Provides Current Workers’ Compensation Certificate. Provide bidder’s standing with the System for Award Management Database (SAM)	<b>GO:</b> No material findings present on audited financial reports. Provides current Certificate of Insurance and Workers’ Compensation Certificate. Provider in good standing with Federal Vendor list.  <b>NO GO:</b> Financial data not provided, or audits contain material findings or unaudited financials show lack of financial stability. Financial ratios demonstrate agency may cease to do business during the contract. Unable to provide Certificate of Insurance and Workers’ Compensation Certificate. Vendor is disqualified from receiving federal funds.	<b>GO</b>  <b>NO GO</b>

**2<sup>nd</sup> Level Evaluation: THE ORGANIZATION, CAPABILITIES, AND SERVICE DELIVERY**

This level of the evaluation will be evaluated using the categories, as shown below.

<b>Number</b>	<b>Category</b>	<b>Max Points</b>
1. Experience providing evidence-based health education programs	<p>Proposal includes responses demonstrating experience and examples of:</p> <ol style="list-style-type: none"><li>1. Serving as an administrative agency for evidence-based health education programs. If you answered yes, please tell us the name of the program, when you served as the administrative agency and provide a brief program description.</li><li>2. Serving as a current host site sponsor with COA for Healthy U or Steady U programs? If yes, state site location and program.</li><li>3. Presence of an infrastructure to support Healthy U and Steady U programs.</li><li>4. Master Trainers associated with your program. Who are they and what programs are they certified for?</li><li>5. Volunteer Leaders associated with your program. Who are they and what programs are they certified to facilitate?</li><li>6. Explanation of how you will ensure your Leaders meet program fidelity criteria which requires Volunteer Leaders to have a chronic condition or be the caregiver of someone with a chronic condition.</li></ol>	<b>30</b>

2. Targeting –  Target population definitions are referenced in <b>Attachment 5</b> .	Describe the agency's:  1. Experience with recruiting participants with the greatest economic and/or social needs with particular attention to consumers who are low-income, who are low-income minorities, who have limited proficiency in the English language, who reside in rural areas, and who are at risk for institutional placement into programs you manage.  2. Presence conducting business in the counties in our 5-county region (Butler, Clermont, Clinton, Hamilton, and Warren)?  3. Strategy for engaging host site sponsors in each county in our service area. As part of your explanation, include your strategy for meeting the performance measure for the minimum number of host site sponsors required in Program Details, pg. 7 Item J of Section Two.  4. Strategy for recruiting seniors, individuals with disabilities and caregivers to join Healthy U and Steady U workshops.  5. Experience with marketing and advertising programs for seniors, adults with disabilities and caregivers. Your explanation should include your marketing and advertising experiences specific to in-person, online and telephone programming.	<b>25</b>
3. Focal Point	Focal Point – Bidder is required to complete the Community Focal Point Worksheet ( <b>Attachment 6</b> ) which identifies your organization's service availability, facility accessibility, and service to the community. <b>0 points</b> -Non-Designation as a Focal Point, <b>5 points</b> -Designation as a Focal Point	<b>0 or 5</b>
4. Technology	Describe your agency's use of technology as it relates to:  1. Experience with teaching seniors how to use the technology on the devices they own?  2. Identification and description of an online platform to host virtual workshops. Explain how the platform meets the needs of the program, Master Trainer, Leaders and participants.	<b>10</b>
5. Business Operations	Describe your agency's oversight and management of the following:  1. Safeguarding client data that is HIPAA compliant.  2. Records retention policy.  3. Timeframes for paying invoices. If you have a policy or workflow for this, please provide it.	<b>15</b>

6. Program Performance Measures	<p>Describe your agency's:</p> <ol style="list-style-type: none"> <li>1. Strategy for ensuring your performance goal of 77% of the registered participants complete the workshops.</li> <li>2. Projections of how many workshops you can complete between October 1, 2021 and September 30, 2022.</li> </ol>	<b>10</b>
<i>Range of Points for 2nd Level Evaluation</i>		<b>0-95</b>

<b>3<sup>rd</sup> Level: Pricing</b>		
<b>Number</b>	<b>Category</b>	
1. Pricing	Does the Proposal demonstrate competitive pricing with respect to other proposals received?	

## **Section Five: PRICING**

Please be aware that the Service/Rate Request form (Attachment 2) is the document that must be used when submitting the bid request for funding. In order to properly fill out this form you will first need to complete the Bid Worksheets found in Attachment One (1).

Attachment One (1) is a series of Excel spreadsheets, and must be completed and submitted in the same Excel format. You will find four (4) tabs at the bottom of the spreadsheet, with the first being instructions how to fill out Tabs A and B of the budget worksheets.

Both the Service/Rate Request Form (Attachment 2) and Budget Worksheets A & B (Attachment 1) must be submitted as part of the RFP requirements.



## **Section Six: INSURANCE AND WORKERS' COMPENSATION**

The Bidder, at the Bidder's sole expense, if awarded a contract, agrees to carry, and maintain in full force and with no interruption of coverage during the entire contract period:

1. The Bidder shall furnish COA with a Certificate of Insurance (Accord 24 Form) evidencing Bidder's liability insurance meets the proper requirements.
2. Comprehensive general liability not less than \$1,000,000 per occurrence and \$2,000,000 annual aggregate. The Insurance Certificate shall name "Council on Aging of Southwestern Ohio (COASW)" as an additional insured and shall include a provision that requires written notice to COA at least thirty (30) calendar days in advance of any cancellation or non-renewal of coverage.
3. Third Party Fidelity or similar insurance covering client loss due to theft of client's property or money by any employee or volunteer of the Bidder.
4. Automobile liability insurance, as applicable, covering all vehicles leased or owned by Provider that are used or operated to deliver service(s) of transportation, adult day service transportation and meal delivery with coverage against claims for injury and/or death in the amount of not less than \$1,000,000 per occurrence.
5. A fidelity bond covering all individuals authorized by the Bidder to collect and/or disburse funds.
6. The Bidder shall have all of the above-described insurance in full force and effect prior to the commencement of work. The insurance must be through a carrier licensed in the State of Ohio and reasonably acceptable to COA.
7. The insurance required under this RFP shall cover acts or omissions of both paid employees and volunteers working for the Bidder.
8. The Bidder shall require the same amount of insurance from all subcontractors utilized under this agreement.
9. Bidders must submit a current Workers' Compensation Certificate with their proposal.

## Section Seven: GENERAL AND TERMS AND CONDITIONS

1. COA reserves the right to accept any proposal, in whole or in part, to waive any informality in any proposal, to negotiate further with one or more bidders regarding any terms of their proposals in order to achieve the best proposal for the benefit of the communities and residents COA serves as determined by COA in its sole discretion, and to reject any or all proposals, or any part or parts of any proposal, for any reason whatsoever.
2. Products and services to be purchased under this RFP are contingent upon COA funding and are in no way a guarantee to the Provider that everything described will be purchased. Any award of this contract does not give Provider the exclusive rights to products and services offered in this RFP including future offerings.
3. Bidders are responsible for compliance with all terms and conditions of this RFP and contract. As such, they are expected to read all documents issued completely.
4. COA is not liable for any errors or omissions in proposals and is not required to make corrections or amendments to errors identified in proposals. If Bidders discover any ambiguity, conflict, discrepancy, omission, or other error in this RFP, they shall immediately notify COA via [provider\\_services@help4seniors.org](mailto:provider_services@help4seniors.org) of such error in writing and request clarification or modification of the document.
5. COA reserves the right to remove any term or condition in any proposal that is not in the best interest of the communities or residents it serves as determined by COA in its sole discretion.
6. Any resulting contract will include the RFP, any addenda issued, presentation material, if requested, and the Bidder's proposal as Exhibits. The documents shall be interpreted in the following order:
  - a. Agreement
  - b. RFP and all addenda including presentation material if presentations are requested, and clarification sought by COA
  - c. Bidder's proposal
7. COA requires that all Providers be able to accept Electronic Funds Transfers (EFTs).
8. The laws of the State of Ohio shall govern this contract and any subsequent purchases. Should there be any disagreement that requires Court action such action must take place in Hamilton County, Ohio in Cincinnati, Ohio.
9. Providers are required to be current on all employment, federal, state, and local income tax payments related to provision of the services rendered or products delivered.
10. No bid may be withdrawn after it has been deposited with COA.
11. No oral statements of any person shall, in any manner or degree, modify or otherwise affect or alter the terms of this RFP, the Contract, or any other document comprising a part or attachment to this RFP.
12. COA reserves the right to adjust rates and establish ceilings for the initial contract and each annual renewal.
13. All proposals become the property of COA and will not be returned to the Bidder. COA has the right to use all ideas contained in any proposal received at no cost to COA. Selection or rejection of a proposal will not affect this right.
14. Only information which is the nature of legitimate trade secrets or non-published financial data may

be deemed proprietary. Any material within a proposal identified as such must be clearly marked "proprietary" and will be handled accordingly. Any proposal marked "proprietary" or "confidential" in its entirety may be rejected without further consideration. Any challenge to COA withholding this information as "proprietary" or "confidential" requiring legal defense, the cost of such defense shall be borne by the Bidder.

15. COA is not responsible for any costs incurred by prospective Bidders. Costs associated with developing the proposal and any other expenses incurred in responding to this RFP are entirely the responsibility of the prospective Bidder and shall not be reimbursed by COA.
16. Bidders who are successful and awarded Contracts must agree to provide all documentation and assurances as outlined in the attached sample contract.
17. COA reserves the right to make changes in program requirements, procedures, and terms after the Bids have been submitted, opened, and reviewed, in order to maximize delivery of services consistent with the objectives of the program.
18. Provider must carry adequate insurance coverage to meet the specifications of this RFP provided as part of the Insurance and Workers' Compensation section.
19. Provider must abide by the specifications set out in the Provider Requirements in an Emergency provided in Appendix A: Emergency Preparedness Plan.
20. If awarded services, the selected Bidder will enter into an Agreement substantially similar to the sample agreement shown in Appendix C.
21. In the event the Bidder is not awarded a contract and desires to appeal COA's decision, the Bidder must follow the instructions provided in Appendix E: Appeals Process.
22. No identifying information protected by HIPAA shall be submitted in your proposal. Submitting HIPAA protected information, or other such protected information will be grounds for rejection of the proposal. This includes information known by, or previously reported to, COA. Bidders are reminded that bid documents are open to public scrutiny under Ohio Public Records laws.