

Date: June 13, 2019

Addendum Number: One

RFP Number: 003-19

RFP Title: ESP Home Delivered Meals Program

The purpose of this addendum is to provide general information and incorporate additions to the RFP. This addendum shall be considered incorporated into the RFP and its requirements as binding as the RFP itself.

Proposal Format Requests:

- It is preferred that the original proposal be in a 3 ring binder format.
- COA is requesting all 5 copies, as well as the original proposal, be divided into sections with a divider of some type.

Proposal Evaluation Requirements:

An additional item has been added to the 2nd Category of the Proposal Evaluation. Please see the revised **Section Six: Proposal Evaluation** section below. The highlighted sections indicate the additions and/or changes made to this section.

*Area
Agency
on Aging*

*Serving
Butler, Clermont,
Clinton, Hamilton,
and Warren counties*

*Administering federal,
state and local programs
to enhance quality of life
for adults and caregivers*

Established 1971



Section Six: Proposal Evaluation

COA shall award a Service Agreement to the bidder(s) who submit the best bid proposal(s) based on evaluation of all bids as determined by COA, in its sole discretion unless COA rejects all bids.

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 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 Home Delivered Meals Program

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

- Negotiate price
- Award to multiple providers
- Eliminate any term or condition that is not advantageous to COA, its clients, or funders.
- Set ceiling/maximum rates for services provided resulting from this RFP

Bid proposals will be evaluated based on Bidder's (1) Financial Analysis and Stability, Certificate of Insurance, and Workers Compensation Certificate, Licensing and Food Safety (2) The Organization and Capabilities Overview, (3) Personnel, Staffing and Training, and (4) Pricing. There are four categories of review identified in the tables below. The first category evaluation determines if the proposal meets the requirements of the RFP - that the organization is financially stable and meets licensing and food safety rules. Bidders not meeting the first category evaluation criteria may not be considered further. The second category evaluation is for the organization and capabilities. The third category evaluation scores is for the Provider's Personnel, Staffing and Training. The fourth category evaluation is based on Pricing. The tables below provides criteria, descriptions, and scoring guidelines.

Selection

COA will form a review committee made up of representatives from various functional areas within and outside of the organization. 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 submitted proposals.

Scoring of Submission

The committee will base the evaluations on the following criteria:

Description	Evaluation Criteria
1 st Category Evaluation- Go/No Go Criteria	Submitted Documentation
2 nd Category Evaluation- The Organization and Capabilities	0-32 points
3 rd Category- Personnel, Staffing, and Training	0-12 points
4 th Category Evaluation- Pricing	Complete based on requested pricing information, and competitive with other proposals

1st 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	Points
1. Financial Stability, Insurance, Workers' Compensation	<ol style="list-style-type: none"> Provides prior year's tax return (including all schedules) and prior year's statement of revenue and expenses. Provides 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. Provides Certificate of Insurance evidencing Bidder's liability insurance meets proper requirements. Provides Current Workers' Compensation Certificate. 	<p>GO: No material findings present on audited financial reports. Provides current Certificate of Insurance and Workers' Compensation Certificate.</p> <p>NO GO: Financial data not provided or audits contain material findings or unaudited financials show lack of financial stability. Unable to provide Certificate of Insurance and Workers' Compensation Certificate.</p>	<p>GO</p> <p>NO/GO</p>
2. Licensing and Food Safety	<ol style="list-style-type: none"> Provides current Certificate of Registration with Ohio Department of Agriculture Division of Food Safety. (Required for all bidders not using COA contracted Caterer.) Provides local health department licenses. (Required for all bidders.) Provides inspection and follow up reports for the previous 2 years that indicate compliance with local, state and federal food safety requirements. 	<p>GO: Supplies appropriate licensure, with no suspension or withholding action in the past 2 years, and no priority or notice status within the past 2 years. Bidder's inspection reports reflect correction of any critical violations.</p> <p>NO GO: Bidder does not have appropriate licensure, inspection reports indicate suspension or withholding action or priority or notice status within the past 2 years. Bidder's inspection reports do not reflect correction of critical violations.</p>	<p>GO</p> <p>NO/GO</p>

2nd Level Evaluation: The Organization and Capabilities Overview

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

Number	Category	Examples for Scoring	Points
1. Commencement Of Services	<p>1. Provide your company's plan to: produce or subcontract with a qualified entity Regular, Therapeutic (Cardiac, Diabetic, Renal, and Dysphagia), Mechanically Altered (Chopped, Ground, and Pureed), Gluten Free, Lactose Free, Shelf Stable, and Kosher (optional) Home Delivered Meals.</p> <p>2. Provide your company's plan to: provide hot, chilled or frozen meals. How you will accommodate single meals, 2-5-7 day packaging options. Plan for delivery Monday through Friday between 10am to 6pm.</p> <p>3. Provide a statement describing capacity to provide home delivered meal services to counties, zones and buildings on which bidder is choosing to bid.</p> <p>4. Describe how clients will make their meal selections. How will clients be educated on process?</p> <p>5. Provide your company's delivery plan of home delivered meals for the first day of service under the contract.</p> <p>6. Providers including Kosher meals in their bid must include their plan to produce or subcontract with a qualified entity to produce Kosher meals, a copy of the Kosher menu, licensed dietitian statement of menu approval and evidence that Kosher meals are prepared in a facility that is under the supervision of a recognized Kosher authority.</p>	<p>Example 0-No details provided.</p> <p>Example 1-Proposal mentions, with little detail, bidder's ability to provide some of the diet options, meal formats, service options and capacity to provide meals to the counties/zones/buildings that they bid on.</p> <p>Example 2-Proposal includes some detail of bidder's ability to provide Therapeutic, Mechanically altered, Gluten free, Lactose Free and Shelf Stable meals. Some detail of the meal formats, service options and capacity to provide meals to the counties/zones/buildings that they bid on.</p> <p>Example 3-Proposal includes description of bidder's ability to provide Regular, Therapeutic, Mechanically Altered, Shelf Stable Meals and plan to phase in Gluten Free and Lactose Free meals by 4/1/2020. Bidder gives some detail on ability to provide hot/chilled/frozen meals in single meal, 2, 5, 7 day package options. . If bid includes Kosher meals, bidder provides evidence that Kosher meals are produced in a facility that is under the supervision of a recognized Kosher authority. Proposal includes plan that describes ability to deliver to counties/zones/buildings; Proposal includes description of order process and education for clients. Proposal includes details for delivery of home delivered meals for the first day of service Monday-Friday.</p> <p>Example 4-Proposal includes detailed description of bidder's ability to provide Regular, Therapeutic, Mechanically Altered, Gluten Free, Lactose Free and Shelf Stable meals. Detailed description of hot/chilled/frozen availability in single meals and 2-5-7 day packaging options. If bid includes Kosher meals, bidder provides evidence that Kosher meals are produced in a facility that is under the supervision of a recognized Kosher authority. Proposal includes detailed plan that describes ability to deliver to counties/zones/buildings.</p>	0-4

		Proposal includes detailed description of order process and education for clients. Proposal includes details for delivery of home delivered meals for the first day of service Monday-Friday.	
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2. Licensing, Nutritional Analysis, Food Safety	<p>Provide documentation of:</p> <ol style="list-style-type: none"> 1. Contracting with Ohio Registered, Licensed Dietitian for menu review. (Required for all bidders not using COA contracted Caterer.) 2. Name of nutritional analysis software, or statement of Menu Pattern for menu planning (Required for all bidders not using COA contracted Caterer.) 3. Good Manufacturing Practices as it pertains to food receiving, food handling, food preparation and food safety to prevent food borne illness. 	<p>Example 0-No details provided.</p> <p>Example 1-Proposal does not include Ohio Registered Dietitian License, includes either name of nutritional analysis software or menu pattern, and mentions they have Good Manufacturing Practices.</p> <p>Example 2-Proposal includes Ohio Registered Dietitian license, mentions name of nutritional analysis software or menu pattern, and gives some detail about Good Manufacturing Practices.</p> <p>Example 3-Proposal includes Ohio Registered Dietitian license. Bidder gave name of nutritional analysis program or statement declaring use of menu pattern. Proposal includes details of their Good Manufacturing Practices.</p> <p>Example 4-Proposal includes Ohio Registered Dietitian license. Proposal includes multiple examples of nutritional analysis of menu options or example of menu pattern. Proposal includes comprehensive details of Good Manufacturing Practices with examples of their procedures.</p>	0-4
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<p>3. Meal options, Food Choice</p>	<p>Describe your company's ability to offer meal choices to clients:</p> <ol style="list-style-type: none"> 1. Number of home delivered meal options including number of beef, poultry, pork, seafood, vegetarian, breakfast items, vegetables, fruit milk options and dessert/snacks. 3. Number of Therapeutic meal options (Diabetic, Cardiac, Renal, Dysphagia) and ability to provide them for single meals as well as 2-5-7 day meal packages. 4. Ability to provide Mechanically Altered meals. (Chopped, Ground, Pureed) 5. Number of Gluten Free and Lactose Free meals available or the bidder's plan to secure meals by April 1, 2020 6. Frequency of menu rotations. 7. Special consideration for menus that include local favorites: Cincinnati Chili, Green Salads, and meal combinations favored by locals (i.e. meatloaf/mashed potatoes, fish/macaroni and cheese, ham/beans/potatoes). 8. Those not using the COA contracted Caterer must include a copy of the proposed menu's (Regular, Therapeutic, Gluten Free, Lactose Free) and an Ohio Licensed Dietitian's statement of menu approval. 	<p>Example 0-No details provided.</p> <p>Example 1-Proposal mentions a limited number of meal options, no menu sample.</p> <p>Example 2-Proposal mentions ability to provide variety with few details of number of options available or example of menus. Proposal mentions ability to provide a 4 week rotation.</p> <p>Example 3-Proposal includes some details of home delivered meal options that include the number of beef, poultry, pork, seafood, vegetarian, breakfast meals, vegetables, fruits/fruit juices. Includes offer of skim, 1%, 2% and low fat chocolate milk, 100% whole wheat bread, whole grain white bread, number of dessert/snack options. Number of Cardiac, Diabetic, Renal meal options. List of Mechanically Altered meals available (chopped, ground, puree). Number of Gluten Free and Lactose Free meals. Proposal includes examples of menu's and 4 week menu rotation.</p> <p>Example 4-Proposal includes number of home delivered meal options that include the number of beef, poultry, pork, seafood, vegetarian, breakfast meals, vegetables, and fruits/fruit juices. Includes offer of skim, 1%, 2% and low fat chocolate milk, 100% whole wheat bread, whole grain white bread, number of dessert/snack options. Includes number of Cardiac, Diabetic, Renal meal options. List of Mechanically Altered meals available (chopped, ground, pureed). Number of Gluten Free, Lactose Free meals. If not using COA Caterer-Includes copy of proposed menus and menu approval from Ohio Licensed Dietitian. Menu includes local favorites. Proposal includes ability to provide Therapeutic and Mechanically Altered meals for single meals as well as 2-5-7 day meal packages. Bidder demonstrates the ability to provide a 4-6 week rotation.</p>	<p>0-4</p>
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<p>4. Continual Quality Improvement Process</p>	<p>Describe how your Quality Management System:</p> <ol style="list-style-type: none"> 1. Incorporates policies, processes and activities which reduce risk, identify weaknesses, and improve all aspects of service delivery. 2. Addresses problems in a timely manner. 3. Engages and utilizes feedback from clients, employees, management and other stakeholders such as COA. 4. Uses standardized data collection tools such as client satisfaction surveys. 	<p>Example 0-No details provided. Example 1-Proposal mentions they have a quality improvement process. Example 2-Proposal mentions quality management policies with no examples/details on how they collect or use data. Example 3-Proposal includes quality management policies. Proposal includes some explanation of how they address problems, how they collect data and how they use the data. Example 4-Proposal includes thorough quality management policies. Proposal includes multiple examples of how problems are addressed in a timely manner. Proposal includes comprehensive details on how data is collected, who it is collected from, and what data is used for.</p>	<p>0-4</p>
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<p>5. Emergency Preparedness</p>	<p>Describe your company's plan to address:</p> <ol style="list-style-type: none"> 1. Food and supply shortages. 2. Food safety concerns. (contamination, failed temperature controls, food recalls). 3. Staffing shortages. 4. Equipment and vehicle failures. 5. Environmental emergencies. (weather, power outages, domestic disturbances). 	<p>Example 0-No details provided. Example 1-Proposal mentions a plan to address shortages, food safety, failures or emergencies, without details. Example 2-Proposal mentions, with little detail, their plan to address shortages, food safety, failures and emergency. Example 3-Proposal includes description with some detail of plan for addressing staff/food/supply shortages, food safety concerns, equipment and vehicle failures, emergencies. Example 4-Proposal contains comprehensive details of company training and onboarding process with respect to food safety. Proposal includes extensive details of their continuity of operations plan with respect to staffing challenges and food/supply shortages, food safety concerns, equipment, vehicle failures, and emergencies to ensure timely completion of deliveries.</p>	<p>0-4</p>
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6. Experience and Commitment to Aging	<p>Proposal includes examples of:</p> <ol style="list-style-type: none"> 1. Years, depth, and breadth of service to the elderly as a business. 2. Organizational mission that supports care services and supports philanthropic efforts on behalf of low income elderly, contributions to the professional field of aging, and advocacy efforts supporting services and support for the elderly. 	<p>Example 0-No details provided.</p> <p>Example 1-Proposal mentions service to the elderly, does not include company mission or how they support the low income elderly.</p> <p>Example 2-Proposal includes company mission and mentions support of low income elderly with no examples given.</p> <p>Example 3-Proposal includes company mission and examples of service to elderly with some details. Proposal mentions support with some details for low income elderly.</p> <p>Example 4-Proposal includes detailed examples of service to elderly. Proposal includes company mission and thorough details of how they support low income elderly.</p>	0-4
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7. County Presence	<p>Bidder demonstrates:</p> <ol style="list-style-type: none"> 1. A presence in one of the 5 counties (Butler, Clermont, Clinton, Hamilton, Warren) where COA provides services. County presence is defined as having a physical office location in a county, hiring employees who reside in a county and/or payment of payroll tax to the county. 	<p>Example 0-No details provided.</p> <p>Example 1- Bidder is not located in Ohio, Indiana, or Kentucky.</p> <p>Example 2- Bidder is physically located in counties located further out than neighboring counties of COA.</p> <p>Example 3- Bidder is physically located in a neighboring county. Bidder demonstrates history of hiring employees residing in 5 county region and/or in neighboring county.</p> <p>Example 4-Bidder is located in either Butler, Clermont, Clinton, Hamilton, or Warren County. Bidder demonstrates history of hiring employees residing in 5 county region. Bidder has a physical office in one of the 5 counties.</p>	0-4
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8. Consumer Contributions	<p>Describe your agency's:</p> <ol style="list-style-type: none"> 1. Process to solicit and accept voluntary contributions. 2. Methods for safeguarding donations and ensuring contributions are used to expand the home delivered meals program. 	0-4
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3rd Level Evaluation: Personnel, Staffing, and Training

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

Number	Category	Examples for Scoring	Points
1. Recruitment, hiring, and retaining staff. Tenure in leadership positions.	Describe your organizations: 1. Strategy to recruit, hire, and retain staff. 2. Backup plan in the event a staff member is unable to complete services. 3. Retention and tenure in leadership positions. 4. Criminal records check and reference check.	Example 0 -No details provided. Example 1 -Proposal mentions recruiting outlets used (i.e.-paper, website, word of mouth etc.) Example 2 -Proposal mentions online recruiting resources used by name and methods of advertising for recruitment. Example 3 -Proposal names recruiting resources and details on new hire orientation, specific recruiting strategies, new hire orientation, and ongoing training programs. Example 4 -Proposal contains comprehensive recruiting strategies, frequency of advertising for recruitment and provides examples (screen shots) of recruiting marketing materials, provides detailed new hire training and orientation schedules, provides continuous training schedules. Bidder Demonstrates retention and tenure in leadership positions.	0-4
2. Training	Describe your company's: 1. Training program that insures new hires are prepared to provide required services according to COA's Home Delivered Meals program as it pertains to their job responsibilities. 2. Continuing education of current employees on required services according to COA's Home Delivered Meals program for a high level of quality and food safety.	Example 0 -No details provided. Example 1 -Proposal does not mention training new hires, or educating current staff on program specifications. Example 2 -Proposal mentions that all staff are trained. Example 3 -Proposal outlines training provided to new hires, and education for current staff on program specifications. Example 4 -Proposal includes specific training strategies to insure staff are skilled and knowledgeable of program specifications (as is relates to their job responsibilities) and the company's mission. Proposal includes examples of training materials/training checklist.	0-4

3. Supervision and performance monitoring	Describe how your company: 1. Provides staff supervision and performance monitoring.	<p>Example 0-No details provided.</p> <p>Example 1-Proposal mentions number of staff and number of supervisors.</p> <p>Example 2-Proposal includes supervisor/staff ratios, mentions supervisor/staff meetings.</p> <p>Example 3-Proposal includes ratios, supervisor/staff meeting schedules, supervisor monitoring.</p> <p>Example 4-Proposal includes sample employment application, supervisor resumes, ratios for supervisor/staff, meeting schedules, supervisor monitoring tools (checklists, audit forms, evaluation documents), and/or frequency of supervisor monitoring.</p>	0-4
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4th Level Evaluation: Pricing

Number	Category		
1. Pricing	1. Does the proposal demonstrate competitive pricing with respect to other proposals received? 2. Does the proposal have pricing for each type of meal for years 1 -3 as well as the renewal options for year 4 and 5?	Price for the entire contract period based on information submitted on Attachment 1-1e Bid Rate Worksheets.	