



**REQUEST FOR
QUALIFICATION &
QUOTATION (RFQ)**

RFQ: 003-22

**GROCERY ORDERING & DELIVERY
TITLE III**

**Council on Aging of Southwestern Ohio
4601 Malsbary Road
Blue Ash, Ohio 45242**

Due Date: Wednesday, September 14, 2022

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Section One: General Information

Bid Overview

Council on Aging of Southwestern Ohio (COA) embraces the principle of person-centered direction and service. Person centered direction places individualized client needs and preferences at the forefront of service delivery.

COA is accepting qualifications and competitive quotes from currently contracted Title III providers interested in adding Grocery Ordering and Delivery services to older adults in Butler, Clermont, Clinton, Hamilton, and Warren Counties.

The goal of this RFQ is to attract the highest quality providers for the lowest cost while meeting the requirements and demand for services for growing senior needs.

The contract period is October 1, 2022 to September 30, 2023.

All Bidders must meet the Service Specification, and all terms and conditions within this document, including all Appendices and Attachments, if selected to receive an Agreement. Please read this document in its entirety.

Important Dates

Request for Proposal Number	Proposal Name
RFQ 003-22	Grocery Ordering & Delivery
Important Dates	
Last Day to Submit Questions	Thursday, September 1, 2022 by 4:00 pm EST
Last Day for COA to Answer Questions Submitted	Tuesday, September 6, 2022
RFQ Due Date	Wednesday, September 14, 2022 by Noon EST
Estimated Award Date	The week of September 19, 2022
Tentative Contract Start Date	Saturday, October 1, 2022

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

provider_services@help4seniors.org

Submitted questions must reference **RFQ 003-22: Grocery Ordering & Delivery**

Only questions submitted in writing to this e-mail address will receive a response. All questions must be submitted no later than September 1, 2022 by 4:00 pm EST. Responses to questions submitted will be posted on COA's website at [Title III Request for Proposals \(www.help4seniors.org\)](https://www.help4seniors.org) no later than September 6, 2022.

Delivery

Each submission must be emailed to provider_services@help4seniors.org and must include a completed Questionnaire that is attached to this RFQ. For confidentiality purposes, on the electronic version, financial information can be marked "proprietary" or "confidential," scanned, and included as a separate file.

All questionnaires must be received no later than NOON Eastern Standard Time on Wednesday, September 14, 2022. A receipt of email delivery will be supplied in response to any questionnaires submitted by the deadline listed above. If a receipt confirmation is not received on or before Thursday, September 15, 2022 at 5:00 pm EST, you must contact Provider Services at provider_services@help4seniors.org.

No late responses will be accepted. COA is not responsible for, and will not open or consider, submissions arriving after the deadline because of missed delivery, improper email address, or any other cause.

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 RFQ, or requests for clarification or modification of this solicitation, no later than the due date and time as set forth in the RFQ. 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 RFQ 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

Council on Aging of Southwestern Ohio (COA) was established in Cincinnati 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 for Butler, Clermont, Clinton, Hamilton, and Warren counties. These five counties comprise Planning and Service Area Number 1 (referred to as 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 more than 40 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. The Ohio Department of Aging (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: Service Description

Grocery ordering and Delivery is a service for a consumer who needs assistance obtaining groceries. This service allows the consumer to order groceries and/or receive assistance with placing an order for groceries. The service includes pickup and delivery of the ordered groceries to the consumers residence that may involve assistance bringing groceries into the residence and putting them away. One unit of grocery ordering and delivery equals to one episode of grocery ordering and delivery. The provider must develop and implement procedures for the safe delivery of groceries. The provider must maintain a record of the consumers name, service date and unique identifier of the consumer. Provider will bill for units of service in WellSky. The selected providers will receive an updated funding schedule to include this additional service.

Council on Aging of Southwestern Ohio (COA) is seeking qualifications and competitive quotes from providers currently contracted for Title III Services to add this service to their funding schedule. The goal of this RFQ 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 attachment for this service, based on [Rule 173-4-11 - Ohio Administrative Code | Ohio Laws](#), and all terms and conditions within this document, including attachments, if selected to receive a Contract.

Section Three: 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 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 to maximize delivery of services consistent with the objectives of the Grocery Ordering & Delivery Service.

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 RFQ

Submissions will be scored as a GO or NO GO format. Submissions receiving a NO GO rating in any category will not be considered for this service.

Selection:

Submissions will be evaluated and scored based on the information given by the bidder in this section.

The examples of scoring are provided in each section, if applicable.

Scoring of Submission

The committee will base the evaluations on the following criteria:

Description	Evaluation Criteria
Questionnaire Evaluation- Go/No Go Criteria	Submitted Documentation

Scoring guide for Grocery Ordering and Delivery Questionnaire Submission		
Provider:		
Evaluator:		
Ability to provide services	GO	NO GO
Do you have the ability/staff to:		
Assist in grocery ordering, if needed?	yes	no
Pickup and safely deliver groceries?	yes	no
Assist in putting groceries away, if needed?	yes	no
Provide this service at the start of contract 10/1/22	yes	no

Processes	GO	NO GO
Questionnaire contains details of how agency will assist the client in ordering groceries.	yes	no
Questionnaire contains details of how agency will assist the client with pick up and safe delivery of groceries	yes	no
Questionnaire contains details of how agency will assist putting groceries away in their home, if needed	yes	no

Pricing	GO	NO GO
Does the proposal demonstrate competitive pricing with response to other proposals received?	yes	no

Section Four: General Terms & 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 RFQ 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 RFQ including future offerings.
3. Bidders are responsible for compliance with all terms and conditions of this RFQ 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 RFQ, they shall immediately notify COA via 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 RFQ, 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. RFQ and all attachments and 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 RFQ, the Contract, or any other document comprising a part or attachment to this RFQ.
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 RFQ 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, 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 RFQ 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 Amendment to add the service outlined in the RFQ to their current Title III agreement with COA.
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 A: Appeals Process under the appropriate Program section.
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.

APPENDIX A: Appeals Process

The Bidder shall have the right of appeal regarding actions taken by COA pertaining to this RFQ per the COA Appeals Process Policy.

COA Appeals Process Policy

COA funds a variety of services for older adults in Southwestern Ohio. Certain funding sources have unique requirements relative to appeals procedures, including the types of actions eligible for appeal. For those funding sources that do not otherwise have established appeals procedures, COA has established appeal protocol. The appeals procedures, by funding source, are set forth in this policy.

Older Americans Act, Senior Community Services Block Grant & Alzheimer Funding

Bidders may appeal “adverse actions” taken by COA as defined below:

- Denial of an application to provide services included in an Area Plan
- Prematurely terminating an existing provider agreement
- Not renewing a multi-year provider agreement

No other issues, actions or decisions are subject to appeal.

A. Administrative Appeal

Bidders may request a COA Local Hearing only after all efforts to administratively resolve the adverse decision have been exhausted. Any administrative efforts to resolve the adverse decision should be forward to the Manager of Procurement and Contract Services or their assigned designee.

Once all efforts to administratively resolve the decision have been exhausted a Bidder not satisfied with the outcome of the as detailed above, may then request a COA Local Hearing.

B. COA Local Hearing

The appellant must submit a written appeal request from its executive-in-charge to COA’s Chief Executive Officer to request a COA Local Hearing. The appeal request letter must be delivered via nationally recognized overnight carrier (e.g., FedEx or UPS) or by hand delivery with receipt acknowledged in writing, to COA, Attn: Chief Executive Officer, 4601 Malsbary Road, Blue Ash, Ohio 45242, and must be received by COA no later than close of business (4:00 p.m. EST) ten (10) business days after the date the appellant received notification of the adverse action which is being appealed.

1. The written appeal request must be signed by the appellant’s executive-in-charge and must include the following:
 - a. E-mail and business addresses for the executive-in-charge or his/her designee.

- b. Phone number for executive-in-charge or his/her designee.
 - c. Identification of the “adverse action” under appeal.
 - d. A detailed explanation of the basis for appellant’s appeal.
 - e. All documentation and other materials supporting the appellant’s position. Documentation and materials that were not included as part of the original application submission will not be considered by COA in the appeals process.
2. A panel of COA staff who were not directly involved in the making the adverse decision which is being appealed will convene to review appellant’s appeal request, within ten (10) business days after the close of appeal submission period. The appellant does not have a right to be present when the COA staff panel convenes.
 3. Upon determination of a decision by the panel, COA will e-mail the appellant a letter identifying the decision. This letter shall constitute COA’s final decision on the matter.
 4. COA will forward a copy of the written appeal request and the staff panel’s decision letter to the Ohio Department of Aging (“ODA”) within five (5) days after the date that COA renders its final decision.

C. Ohio Department of Aging Hearing

1. An appellant not satisfied with the outcome of the COA hearing as detailed above, may request an appeal hearing before ODA in compliance with Ohio law (see OAC 173-3-09).
2. No request for an appeal hearing shall be honored by ODA unless the appellant has first appealed the adverse action with COA and fully complied with COA’s policies governing appeal hearings, as set forth above.

Elderly Services Programs – Local Senior Services Levy Funding

Bidders dissatisfied with the outcome of the ESP evaluation process may appeal the outcome in accordance with this policy. The right of appeal is limited to a decision by COA not to award an agreement to such Bidder for all or some of the services for which the applicant applied. No other issues, actions or decisions are subject to appeal.

A. Administrative Appeal

Bidders may submit an administrative appeal to try to resolve the adverse decision. Any administrative efforts to resolve the adverse decision should be forward to the Manager of Procurement and Contract Services, or their assigned designee, in writing to Provider_Services@help4seniors.org within ten (10) business days after the date the appellant received notification of the adverse decision.

Once all efforts to administratively resolve the decision have been exhausted, should a Bidder not be satisfied with the outcome of the process as detailed above, the Bidder may then request a COA Local Hearing.

B. COA Local Hearing

The appellant must submit a written appeal request from its executive-in-charge to COA's Chief Executive Officer to request a COA Local Hearing. The appeal request letter must be delivered via nationally recognized overnight carrier (e.g., FedEx or UPS) or by hand delivery with receipt acknowledged in writing, to COA, Attn: Chief Executive Officer, 4601 Malsbary Road, Blue Ash, Ohio 45242, and must be received by COA no later than close of business (4:00 p.m. EST) ten (10) business days after the date the appellant received notification of the adverse action which is being appealed.

1. The written appeal request must be signed by the appellant's executive-in-charge and must include the following:
 - a. E-mail and business addresses for the executive-in-charge or his/her designee.
 - b. Phone number for executive-in-charge or his/her designee.
 - c. Identification of the "adverse action" under appeal.
 - d. A detailed explanation of the basis for appellant's appeal.
 - e. All documentation and other materials supporting the appellant's position. Documentation and materials that were not included as part of the original application submission will not be considered by COA in the appeals process.
2. A panel of COA staff who were not directly involved in making the decision which is being appealed will convene to review appellant's appeal request (a "COA Staff Hearing"), within ten (10) business days after the close of appeal submission period. The appellant does not have a right to be present at the COA Staff Hearing.
3. Upon determination of a decision by the panel, COA will e-mail the appellant a letter identifying the decision.

C. COA Board Hearing

1. No request for an appeal hearing shall be honored by the COA Board of Trustees (the "Board") unless the appellant has first fully complied with the COA Staff Hearing process.
2. An appellant not satisfied with the outcome of the COA Staff Hearing as detailed above, may then request an appeal hearing before the Board.

3. The appeal request letter must be delivered via nationally recognized overnight carrier (e.g., FedEx or UPS) or by hand delivery with receipt acknowledged in writing, to COA, Attn: Chief Executive Officer, 4601 Malsbary Road, Blue Ash, Ohio 45242, and must be received by COA no later than close of business (4:00 p.m. EST) five (5) business days after the date that appellant received notification of the outcome of the COA Staff Hearing.
 - a. The appeal request must be in writing and signed by the appellant's executive-in-charge and must include:
 - i. E-mail and business addresses for the executive-in-charge or his/her designee
 - ii. Phone number for executive-in-charge or his/her designee
 - iii. Identification of the "adverse action" under appeal
4. The Finance Committee of the Board shall serve as the Appeals Committee of the Board unless otherwise approved by the Board.
5. The Appeals Committee will review the decision in dispute and will meet with the appellant if deemed necessary by the Appeals Committee, before submitting a recommendation to the Board for final action.
6. The Board, at its next regularly scheduled meeting, will review the recommendation of the Appeals Committee and adopt a final course of action. The Board may choose (but is not required) to schedule a special meeting of the Board to consider the Appeals Committee recommendation if time is of the essence. Within ten (10) business days after the meeting, the appellant will be notified of the Board's decision.
7. The decision of the Board will be final and binding. If the Board reverses the decision of the COA Staff Hearing, the Board's decision will be implemented as soon thereafter as reasonably possible. In no event will the appellant be compensated for any funds lost during the appeals process or entitled to damages of any sort.