

REQUEST FOR PROPOSAL (RFP)
TITLE III C-1 CONGREGATE MEAL PROGRAM
For Grant Period July 1, 2012 – June 30, 2013

Proposal Control Number 2012-01

ISSUED BY:



DIVISION OF AGING AND ADULT SERVICES

10 North San Pedro Road, Suite 1023

San Rafael, CA 94903

Phone: 415-473-7118

Website: www.marincounty.org/aging

**COUNTY OF MARIN
DIVISION OF AGING AND ADULT SERVICES
REQUEST FOR PROPOSAL (RFP) TIMELINE
ELDERLY NUTRITION PROGRAMS**

Program	Older Americans Act Title IIIC Elderly Nutrition Program Congregate Meal Program
Awarding agency	Marin County Department of Health and Human Services, Division of Aging and Adult Services 10 North San Pedro Rd., Suite 1023 San Rafael, CA 94903
Contact person	Ana P. Bagtas Phone: (415) 473-6947 E-mail: abagtas@marincounty.org
Available Funding	Title IIIC-1 Congregate Meals : \$ 72,500
Grant Period	July 1, 2012 through June 30, 2013
RFP date of issuance	Friday, February 10, 2012
Bidder's conference	Thursday, February 23, 2012 10:00 a.m. – 12:00 p.m. 20 North San Pedro Rd., Conference Rooms A/B San Rafael, CA 94903
Deadline for AAA to post written technical assistance and Q & A	Friday, March 2, 2012
Proposal submission deadline	Wednesday, March 14, 2012, Noon
Proposal submission address and instructions	Proposals may be submitted in person, via courier service, or mailed (not recommended) by Wednesday, March 14, 2012 at Noon at: Marin County Division of Aging and Adult Services 10 North San Pedro Rd., Suite #1023 San Rafael, CA 94903 Attention: Nicholas Trunzo, Director Mailed proposals must be received at the Division office by the deadline, <u>not the date stamp of mailing</u> . A certificate of receipt of application will be issued for all proposals submitted. Faxed or e-mailed proposals and proposals received after the deadline will not be considered.
Required copies to be submitted	1 original, 4 copies, and 1 electronic copy on a CD or flash drive
Grant award announcement*	Thursday, March 29, 2012
Protest submission deadline	Thursday, April 5, 2012, Noon
Commission on Aging meeting	Thursday, April 12, 2012, 11:30 a.m.
Board of Supervisors contract approval	Tuesday, May 8, 2012
Initiation of services	July 1, 2012

* Date subject to Board of Supervisors schedule and County budget and contract processes.

I. INTRODUCTION

The Marin County Department of Health & Human Services, Division of Aging and Adult Services is issuing this REQUEST FOR PROPOSAL (RFP) from qualified private or nonprofit providers for the provision of congregate meal services to older adults living in Marin County. The congregate meal program provides meals to persons age 60 years or older and other eligible individuals in a group setting. Services include meals, nutrition and health promotion education, health promotion programs, nutrition risk screening, and opportunities for socialization. Each meal shall provide one-third of the Dietary Reference Intakes and comply with the most current Dietary Guidelines for Americans.

Through this RFP, a private or non-profit agency or agencies will be identified and selected to provide congregate nutrition services at strategically located sites to Marin County residents 60 years and above, during the period from July 1, 2012 through June 30, 2013. Contracts awarded through this RFP may be negotiated and renewed annually for up to three additional years following the period specified in this announcement and ending on June 30, 2016.

A. About the Marin County Division of Aging and Adult Services

The Division of Aging and Adult Services (DAAS) is one of five major divisions within the Marin County Department of Health and Human Services. DAAS administers the Area Agency on Aging in Marin County and works closely with the Commission on Aging (COA), a 23-member advisory council appointed by the Board of Supervisors and each of the 11 towns and cities of Marin. In partnership with the COA, DAAS has the overall responsibility of planning, coordinating, and advocating for a comprehensive, integrated community-based service system to meet the needs of older persons and family caregivers in Marin County. DAAS also includes Adult Protective Services, In-Home Support Services, Veterans Services, the Public Guardian, Ombudsman and Transitions Public Health Nurse Case Management Services.

B. About the Planning and Service Area

The State of California is divided into 33 Planning and Service Areas (PSAs) for the administration of the Older Americans Act and Older Californians Act. In each PSA, a single agency has been designed as its Area Agency on Aging (AAA) charged with fulfilling the statutory mandates contained in both Acts. Marin County is designated as Planning and Service Area 5 (PSA 5) with the Board of Supervisors governing the Area Agency on Aging and the Division of Aging and Adult Services carrying-out its operational responsibilities.

II. REQUEST FOR PROPOSAL

The Marin County Department of Health & Human Services, Division of Aging and Adult Services (hereinafter referred to as “County”) is seeking qualified private or nonprofit agencies (hereinafter referred to as “Applicant(s)”) to provide Congregate Meal Services and related administrative functions to eligible older adults residing in all parts of Marin County, including West Marin and the San Geronimo Valley. Selected Applicant(s) will be required to ensure that priority is given to hard-to-reach rural geographic areas and in neighborhoods and towns where

high density of minority and low-income older adults reside. The program will provide meals to older adults 60 years and above who need nutritionally balanced meals to sustain health and maintain independence. Among other things, the contract requires that each congregate site administered by the Applicant must serve an average of at least 20 meals per service day. The contract period will be July 1, 2012 through June 30, 2013, with annual renewal options for three additional years contingent upon the success of the program and funding availability.

The County reserves the right to make multiple or partial awards of contracts through this RFP, or to award none.

The total amount of funding available for congregate nutrition services to serve Marin County is \$72,500. This funding will be allocated as follows: **\$23,000** for West Marin and San Geronimo Valley and **\$49,500** to serve the North, South, and Central Marin communities. Applicants may propose to serve multiple sites and geographic areas and must demonstrate the capacity to provide the following minimum number of units, as measured by number of meals served:

Service Area	Total Funding Available	Minimum Number of Units to be Served
West Marin & San Geronimo Valley	\$23,000	3,833 meals
Central, Northern, and Southern Marin	\$49,500	8,250 meals

Payment for all services provided in accordance with provisions under this contract shall be contingent upon the availability of Federal and State funds for the purpose of providing congregate nutrition services. The County shall not be required to provide any definite number of meals nor does the County guarantee any minimum amount of funding for the service.

By submitting a response to this RFP, Applicant agrees to be bound by, and to sign, the contract with the County. All information included in the RFP, with the exception of what may be renegotiated in the Scope of Services, will be referenced.

The County has the right to negotiate the Applicant's proposed Scope of Services in response to this RFP prior to finalizing the contract.

III. PROGRAM DESCRIPTION AND REQUIREMENTS

The Congregate Meal Program requires compliance with and performance of Federal, State, and County standards for Elderly Nutrition Program. The selected Applicant(s) shall demonstrate the ability to comply with program requirements outlined in the Sample Scope of Service (Attachment F), including those described below:

Program Requirements: The selected Applicant(s) must comply with all applicable federal, state, and local laws, including non-discrimination and conflict of interest requirements. Title III C Elderly Nutrition Program requirements are found in the Older Americans Act (OAA 42 USC

Section 3001-3058), Code of Federal Regulations (45 CFR XIII, 1321); Title 22, California Code of Regulations (CCR), Section 7000 et seq.; California Retail Food Code (CRFC); and California Department of Aging Program Memoranda.

Congregate Meal Location: The selected Applicant(s) must have at least one meal site in each of the following cities/areas and their vicinity: Central San Rafael, the Canal, Marin City, Novato, San Geronimo Valley, and West Marin. The congregate meal site must be located in an area easily accessible to the target population as stated in this RFP and at a facility that meets all American Disabilities Act (ADA) requirements. The facility must have the capacity to obtain a valid health permit from the Environmental Health Department.

Congregate Meal: Meals served at a site must be appropriate for proposed target population and ready-to-eat on site. Each Meal shall provide one-third (1/3) of the recommended dietary allowance (RDA) and comply with the current Dietary Guidelines for Americans.

Client Contribution: The selected Applicant(s) shall provide opportunities for program participants to voluntarily donate towards the cost of the meals in a confidential manner. Donations will be treated as program income and must be used to defray the costs of running congregate nutrition services. No one will be denied services for not contributing to the program.

Client Intake and Nutrition Risk Screening: Older Americans Act Senior Nutrition Programs have intake forms that have been approved by the Area Agency on Aging for persons receiving meal services to complete. All participants are strongly encouraged to complete all the data elements in the intake form. However, eligibility for congregate meal participants only requires a self-declaration of age, and participants may decline to complete the intake form. Eligible participants will receive a meal whether or not they complete the intake form. Contractor(s) must make the effort to encourage clients to complete as much information on the intake form as clients are willing to share. Information on the intake form provides the County and the State a better understanding of the clients served by the nutrition program.

Food Safety Certification: The individual overseeing the congregate meal operation must have the capacity to obtain a valid certificate two months after granting the award.

Meal Production Kitchen: Meals must be prepared from kitchens that maintain valid health certification. An agreement with the meal production kitchen must be developed if the selected Applicant(s) does not operate a kitchen.

Budget: The reimbursement for each meal from the County grant shall be no more than \$6.00. The selected Applicant(s) is expected to budget proposed donations from program participants and to use these funds to cover the costs of the program. An overall program matching contribution of at least 10% is required. Matching contribution is defined as the value of the portion of program and administrative costs funded by cash or in-kind contribution by the contractor, subcontractor, or other local resources. A Program Budget must be submitted with your RFP Application. Use the form (Attachment D) included in this RFP.

State Contract Compliance: This award is made based on funding from the federal Older Americans Act for senior nutrition program administered locally by the Division of Aging and

Adult Services through a contract with the state Department of Aging. As such, the agency awarded this grant is subject to compliance with all the terms and conditions included in the following link to the California Department of Aging contract:

http://www.co.marin.ca.us/depts/HH/main/ag/PDFs/Title_III_VII_State_Contract.pdf

IV. TARGET POPULATION

Services must target older adults aged 60 years and above, living in Marin County, and must give preference to older individuals in greatest economic or social need with particular attention to low-income minority. The number of minority elders to be served, at a minimum, should be in the same proportion as represented in Marin's older population according to the most recent U.S. Census. The selected Applicant(s) must ensure provision of programs and services to all classes that are protected by State and Federal law.

V. MINIMUM QUALIFICATIONS

Applicant(s) shall possess all of the following minimum qualifications:

1. A minimum of 2 years of same or similar services to that required in this RFP.
2. A minimum of 2 years serving the target population.
3. A valid food safety certificate, or the ability to obtain one within two months of the award.

VI. RESPONSE PACKAGE CONTENT

A complete request for proposal application package must include an original, four copies, and an electronic copy saved in a USB device or CD. The application package must contain all of the following items and must be presented in the order listed below:

A. Application Face Sheet (Attachment A)

Complete the Application Face Sheet provided in this RFP. Include the completed Face Sheet in each copy of a complete application packet. The Face Sheet includes an Application checklist. Applicants must complete the checklist and ensure that all required documents are provided in the response package.

B. Blank Scoring Sheet (Attachment B)

Include a blank Scoring Sheet provided in this RFP in each copy of a complete response package.

C. Completed Narrative Responses (Attachment C)

Using the **Narrative Responses form** provided in this RFP, respond to the questions and information requested in order to describe your capacity to administer the congregate nutrition program and successfully fulfill its requirements and deliver the services. Narrative responses should be provided directly on the Narrative Response form and must not exceed 12 pages total, including the form itself.

D. Program Budget (Attachment D)

Using the Program Budget form included in this RFP, provide a breakdown of all the costs associated with providing the services proposed in this application. In addition to the grant being sought from the County, identify other funding sources to cover all costs outlined in the budget. An overall program matching contribution of at least 10% is required.

Matching Contributions mean local cash and/or in-kind contributions by the selected Applicant, subcontractor, or other local resources that qualify as match for the contract funding. Cash and/or in-kind contributions may count as match, if such contributions are used to meet program requirements. Matching contributions must be used for allowable costs in accordance with the Office of Management and Budget (OMB) circulars.

Non-Matching Contributions mean local funding that does not qualify as matching contributions and/or is not being budgeted as matching contributions. (e.g., federal funds, overmatch, etc.).

Program Income means revenue generated by the Applicant or subcontractor from contract-supported activities. Program income is:

- a. Voluntary contributions received from a participant or responsible party as a result of services.
- b. Income from usage or rental fees of real or personal property acquired with grant funds or funds provided under this contract.
- c. Royalties received on patents and copyrights from contract-supported activities.
- d. Proceeds from sale of items fabricated under a contract agreement.

E. Letters of Support

Include a minimum of two letters of support from partner organizations. The letters of support should highlight the partnership of the recommender with the Applicant, citing specific examples of projects and efforts to coordinate services and improve clients' access to local resources.

VII. SUBMISSION OF PROPOSAL IN RESPONSE TO THE REQUEST FOR PROPOSAL

An original, four copies, and an electronic copy saved on a USB device or CD of the complete application package must be hand-delivered or received by mail no later than **12:00 P.M. on Wednesday, March 14, 2012** at the following address:

**Marin County Department of Health and Human Services,
Division of Aging and Adult Services
10 North San Pedro Road, Suite #1023
San Rafael, CA 94903
Attention: Nicholas Trunzo, Director**

No faxed or e-mailed applications will be accepted and doing so will result in automatic disqualification of the Applicant without further review. The Applicant bears the risk of non-delivery of Request for Proposal Application within the deadline specified herein. Mailed applications must have the County mail services "received" date stamp by the deadline, NOT the post office date stamp in order to be considered for a timely submission. Applications should be submitted by a means that will objectively establish the date the County received the Application. A statement of receipt will be issued to all Applicants for applications received by the deadline.

VIII. EVALUATION CRITERIA AND SELECTION PROCESS

An Application Scoring Sheet is included in this RFP. Proposals are going to be evaluated based on the following criteria:

- a. Organizational Capacity: history, experience, and capacity of the organization in providing similar services to the target population.
- b. Program Design and Approach.
- c. Administrative and Fiscal Qualifications: cost effectiveness and efficiency of the services proposed.

A committee comprised of parties with expertise in the services intended in this RFP will evaluate the proposals. The County reserves the right to seek clarifying or additional information from applicants, potentially including site visits or agency interviews.

IX. NOTICE OF AWARD

Contract award will be announced on **Thursday, March 29, 2012**. All Applicants will be notified of the award decision by email with a hard copy to follow by post.

X. PROTEST PROCEDURE

Within five calendar days of the issuance of a notice of intent to award the contract, any Applicant that has submitted a proposal and believes that the Division of Aging and Adult Services has incorrectly selected another Applicant for award may submit a written notice of protest. The notice of protest must include a written statement specifying in detail each and

every ground asserted for the protest. The protest must be signed by an individual authorized to represent the Applicant, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the Applicant must specify facts and evidence sufficient for the County to determine the validity of the protest.

A. Delivery of Protests

All protests must be submitted in writing and received by **12:00 p.m. on Thursday, April 5, 2012** at the following address:

Marin County Department of Health and Human Services,
Division of Aging and Adult Services
10 North San Pedro Road, Suite #1023
San Rafael, CA 94903
Attention: Nicholas Trunzo, Director

If a protest is mailed, the Applicant bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) or via e-mail will not be considered.

B. Protest Decision

The protest will be reviewed by Nicholas Trunzo, Director, Division of Aging and Adult Services. The decision of the Director on the protest is final and will be sent to the appealing Applicant by email with a hard copy to follow by post.

XI. BIDDER'S CONFERENCE

A Bidder's Conference has been scheduled on **Thursday, March 23, 2012, 10:00 a.m. – 12:00 p.m.** at 20 North San Pedro Road, Conference Rooms A/B, San Rafael, CA. Potential Applicants will have a chance to address questions and clarify specific elements of the RFP announcement at this meeting. Questions, comments, and request for technical assistance received prior to the Bidder's Conference will not be accepted. Proceedings of this meeting will be posted within 72 business hours through an online County web link that will be announced at the Bidder's Conference (see section XII below). Potential Applicants need not be present at the Bidder's Conference to submit an application.

XII. QUESTIONS, COMMENTS, AND TECHNICAL ASSISTANCE

The Division of Aging and Adults Services will be available from **February 23, 2012 – March 2, 2012** to provide technical assistance and respond to questions and inquiries from potential Applicants. A County web link to post questions, comments, and requests for technical assistance that will be announced at the Bidder's Conference. In order to maintain a fair and

open bidding process, the County will only accept inquiries received in writing from this site. The County will post responses to these inquiries only through this site. Applicants unable to attend the Bidder's Conference may contact Ana Bagtas at 415-473-6947 or e-mail abagtas@marincounty.org after February 23 to get the web link and to obtain instructions on how to subscribe to the site.

XIII. LIST OF ATTACHMENTS

1. Attachment A: Application Face Sheet & Checklist
2. Attachment B: Scoring Sheet
3. Attachment C: Narrative Response
4. Attachment D: Program Budget Form
5. Attachment E: Congregate Meal Site Service Protocol
6. Attachment F: Sample Scope of Service

XIV: ADDITIONAL DOCUMENTS REQUIRED FOR REVIEW

The following links outline the program requirements regulations governing the Elderly Nutrition Program. Copy and paste the link to your web browser to access the document. Applicants must review these documents and make sure you understand the program requirements before submitting an application.

1. California Retail Food Code January 1, 2011:
<http://www.cdph.ca.gov/services/Documents/fdbRFC.pdf>

Title 22 California Code of Regulations relating to the Elderly Nutrition Program:
<http://weblinks.westlaw.com/toc/default.aspx?Abbr=ca%2Dadc&Action=ExpandTree&AP=I7E25BE40D4B711DE8879F88E8B0DAAAE&ItemKey=I7E25BE40D4B711DE8879F88E8B0DAAAE&RP=%2Ftoc%2Fdefault%2Ewl&Service=TOC&RS=WEBL12.01&VR=2.0&SPa=CCR-1000&pbcd=DA010192&fragment#I7E25BE40D4B711DE8879F88E8B0DAAAE>

2. Office of Management and Budget Circular 133:
<http://www.whitehouse.gov/sites/default/files/omb/circulars/a133/a133.pdf>
3. Sample Contract with California Department of Aging
http://www.co.marin.ca.us/depts/HH/main/ag/PDFs/Title_III_VII_State_Contract.pdf
4. Sample County Contract Boilerplate
<http://mine/mine/AD/Main/contracts.cfm>

ATTACHMENT A: APPLICATION FACE SHEET

Agency Name: _____

Address: _____

City: _____ Zip: _____

Website (if applicable): _____ Fax: _____

Executive Director: _____ Phone: _____ E-Mail: _____

Contact Person: _____ Phone: _____ E-Mail: _____

Total Grant Request (7/1/12-6/30/13): \$ _____

This application package includes the following (check all items included in Applicant's response package):

- Cover letter
- Completed Application Face Sheet (Attachment A)
- Blank Scoring Sheet (Attachment B)
- Narrative Response (Attachment C)
- Program Budget (Attachment D)
- Letters of Support
- One original, four copies, and electronic copy in a USB device or CD

I, the undersigned am an official authorized to bind the Applicant to this Response to the Request for Proposal. I understand that the Department of Health and Human Services, Division of Aging and Adult Services (DAAS) reserves the right to modify the specifics of this application at the time of funding and/or during the contract negotiation; that no officer, employee or agent of DAAS, exercising any function or responsibility in connection with the proposed services contract or with planning or carrying out any agreement relative to this proposal has any personal financial interest, direct or indirect, in the operation of the Applicant; that a contract may be negotiated for a portion of the amount requested; and that there is not contract until a written contract has been signed by both parties and approved by all applicable County agencies and agents.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

ATTACHMENT B: SCORING SHEET

**ELDERLY NUTRITION PROGRAM
Congregate Meal Program Request for Proposal 2012**

I. ORGANIZATIONAL CAPACITY			
Evaluation Criteria	Max Points Available	Reviewer's Score	Reviewer's Notes
1. The organization is well established, has clearly stated priorities, and a mission that is consistent with the stated program goals.	2		
2. The organization possesses the capacity, resources, and experience to successfully implement the service described in the RFP.	7		
3. The applicant demonstrates recognition and understanding of the needs and characteristics of the population to be served by this program. The applicant demonstrates experience and success in serving the needs of the targeted populations.	7		
4. The applicant clearly demonstrates recognition of the importance of coordinating with local service programs within the County. Response clearly describes how the partnership has led to better coordination of services and improved access to local resources for clients. Letters of support (minimum of 2) are provided.	5		
5. The applicant demonstrates past and current experience in providing services similar to the one described in this RFP.	4		
Subtotal	25		

II. PROGRAM DESIGN & APPROACH

Evaluation Criteria	Max Points Available	Reviewer's Score	Reviewer's Notes
1. The proposed program directly addresses the needs of older adults consistent with the goals of the program. Proposed services are appropriate and clearly fit the program goals.	6		
2. The organization demonstrates a clear understanding of the targeted populations and communities prioritized by the Older Americans Act. The Applicant has a clear method and demonstrated ability and experience in reaching the targeted groups and communities.	10		
3. The applicant has clearly articulated goals with measurable objectives that and address identified needs and service priorities.	5		
4. Proposal addresses service priorities and targets areas with the most need. Program activities and service unit plan are meaningful, reasonable, and achievable in the stated timeframe. If Applicant is not providing services directly to the site, is the proposed collaborative plan with the site(s) clear, effective, and feasible.	8		
5. The applicant has designed a system for evaluating the quality of internal operations and processes as well as service delivery, including client satisfaction and a system for measuring program outcomes.	5		
6. The applicant has a clearly-articulated outreach/marketing plan to promote the program in the community and reach new clients not previously served. The Applicant describes specific methods and processes that allow the program to reach maximum client capacity.	6		
Subtotal	40		

III. ADMINISTRATIVE & FISCAL QUALIFICATIONS

Evaluation Criteria	Max Points Available	Reviewer's Score	Reviewer's Notes
1. The organization's structure and staff are adequate to support the administration of the program and for meeting program standards and requirements. The proposed reporting relationships are clear and assure good communication with staff at all levels. The proposed salary and benefit structure are fair and consistent with similar organizations.	10		
2. The organization provided clear methods for collecting, maintaining, and submitting data and other administrative reports. For current or previous DAAS contractors, records indicate accurate and timely submission of data.	5		
3. The organization has in place accounting procedures that will assure effective control and accountability, and which meet state and federal standards. Applicant has a sound method for ensuring timely fiscal reporting. For current or previous DAAS contractors, records indicate current and timely submission of fiscal reports.	5		
4. The proposed budget is appropriate, cost effective, accurate, and includes a clear, comprehensive narrative. The organization has a clear method for collecting program income. The organization has sufficient resources to assure successful operation of the program.	15		
Subtotal	35		
PROPOSAL TOTAL SCORE			
PASSING SCORE TO BE CONSIDERED FOR FUNDING			70

Reviewer's Additional Comments:

ATTACHMENT C: NARRATIVE RESPONSE FORM

REQUEST FOR PROPOSAL (RFP) TO PROVIDE CONGREGATE MEAL PROGRAM JULY 1, 2012 THROUGH JUNE 30, 2013

Please provide complete and concise responses to the following questions directly on this form. Limit your responses to no more than 12 pages total, including this Narrative Response Form.

ORGANIZATIONAL CAPACITY

- 1. Describe your organization's history, purpose, and mission statement.*
- 2. Provide a summary of your organization's skills, resources, and experience relevant to the services described in this Request for Proposal (RFP).*
- 3. Describe how your organization is going to reach the targeted populations considered priority groups and areas for this program (refer to Section IV of this RFP).*
- 4. Describe your organization's experience in coordinating with local and regional community services to integrate the service delivery system in Marin County. Provide specific examples of how these efforts have led to increased opportunities for older adults to access services. Please include a minimum of two letters of support (excluded from the page limit of this application form) from partner organizations describing the nature of the collaboration.*
- 5. Provide a statement listing all of your organization's contracts (both public and private) relevant to the services solicited that have been completed during the last two (2) years. The statement must also list any failure or refusal to complete a contract, including details and dates.*

PROGRAM DESIGN AND APPROACH

- 6. Provide a summary of the proposed program and describe how it will enhance and strengthen the nutritional health of older adults in Marin County. Identify and explain the appropriateness of planned services and how they fit the program goals.*
- 7. Describe how the organization will target services to targeted communities and populations, particularly those with the greatest economic or social needs. Proposal must identify strategies to reach older adults from minority, limited English-speaking, low-income, and rural communities. Applicant may include relevant data and other information to make the case for the service approach being proposed.*

8. Identify overall **goals** of the proposed program. Describe specific measurable outcome-based **objectives**, with timelines, that will support the fulfillment of the established program goals.
9. Identify the **scope of service** proposed, along with the number of **units** and number of **clients** for each service planned. Use the following table to help identify your program's scope.

Site name & Location (City/Town)	Day(s) of the Week to be Served	Annual Unduplicated Number of Clients to be Served	Annual Number of Meals to be Served

If the meal site(s) named above is administered and managed by an organization that is not the Applicant, describe your collaborative plan by providing the following information:

- a. A description of your organization's partnership with the proposed site(s).
 - b. A summary of your organization's communication plan with the congregate meal sites.
 - c. A detailed description of how your organization and the site(s) will work together to distribute the responsibilities of managing the site and delivering the service. Include a Service Protocol between your organization and each of the collaborating partners/sites (see Attachment E for a sample Congregate Meal Site Service Protocol).
 - d. A description of your organization's procedures for handling difficult clients at the congregate meal site and protocol for processing complaints.
10. Describe your organization's plan for meal production (agency's own kitchen or caterer) and menu development that meet the Title III C requirements. Carefully review the California Retail Food Code and the California Code of Regulations Title 22 relating to the Elderly Nutrition Program (see web links provided in section XIV above) to find out about the requirements of the program. Include in your response an explanation of how your organization will manage and monitor meal production to ensure quality and safety, as well as how it will obtain a valid health certificate and food safety certificate.

11. *Describe methods for which the effectiveness of the proposed service will be evaluated. Identify ways the agency's proposed program will impact the well-being and independence of older adults in Marin County. Identify strategies the agency plans to continuously improve the quality of the program.*
12. *Describe the outreach/marketing methods the organization intends to employ to generate participation in the program. Identify strategies to reach older adults who have not previously been served by the program.*

ADMINISTRATIVE AND FISCAL QUALIFICATIONS

Total amount of funding requested: \$ _____

13. *Describe the organizational structure and proposed job descriptions and duties of paid staff and volunteers in the program.*
14. *Discuss how the organization will comply with data reporting requirements. Describe the agency's client intake process and data management, including ensuring the completeness and accuracy of gathering the required data elements from client data, maintaining privacy/confidentiality of client data, and procedures for handling and reporting data/client information breach. Describe the agency's procedures for ensuring timely submission of data and other administrative reports as requested by the County.*
15. *Describe the organization's current accounting system, including the following: areas and frequency of accounting for receivables and payables; payroll processing; financial statement preparation, and internal/external auditing. Describe the agency's procedures for ensuring timely submission of invoices and other fiscal reports as requested by the County.*
16. *Using the Budget Form (Attachment D) provided in this RFP, prepare a budget for the program/service proposed. Describe the organization's program budget by providing clear and specific descriptions of the following to demonstrate the Applicant's ability to cover all costs of the service proposed:*
 - a. *Agency's fundraising Plan*
 - b. *Source of cash match and in-kind support to cover costs not covered by the grant.*
 - c. *System for collecting voluntary contributions (program income) for services and how program income will be distributed to help defray the cost of the service. Describe the agency's mechanism for supporting those who cannot afford to make donations.*

ATTACHMENT D: PROGRAM BUDGET FORM

NOTE: this budget form is available in electronic format and may be furnished upon request to potential Applicants.

AGENCY NAME:

Original__XXX_ Revision No.____

Program: Congregate Meal Program

Total Meals: xxx

ELDERLY NUTRITION PROGRAM BUDGET SUMMARY

Fiscal Year: 2012-2013
 Contract Period: July 1, 2012 - June 30, 2013

BUDGET CATEGORRY	TOTAL BUDGETED COSTS	ACTIVITIES			FUNDING SOURCES			
	(a)	Meals Delivery (b)	Program Mgmt (c)	Home Delivery (d)	AAA Grant (e)	Match Cash (f)	Match In-Kind (g)	Project income (h)
Personnel	0	0	0		0	0	0	0
Travel & Training	0	0	0		0	0	0	0
equipment	0	0	0		0	0	0	0
Raw food	0	0	0		0	0	0	0
Food Service Supply	0	0	0		0	0	0	0
Food Transport	0	0	0		0	0	0	0
Site Costs	0	0	0		0	0	0	0
Other Costs	0	0	0		0	0	0	0
Grand Total Costs	0	0	0	0	0	0	0	0
Cost Per Meal	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Cost %	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

Project Director Name: _____

Signature: _____

AGENCY NAME:

Original XX

Program:

Total # Meals to be Served

Revision No.____

Congregate Meal Program

XXX

ELDERLY NUTRITION PROGRAM BUDGET DETAIL COST ALLOCATION

FY: 2012-2013

BUDGET CATEGORY	TOTAL BUDGETED COSTS (a)	ACTIVITIES			FUNDING SOURCES			
		Meals Delivery (b)	Program Mgmt (c)	Home Delivery (d)	AAA Grant (e)	Match Cash (f)	Match In-Kind (g)	Project income (h)
Personnel:								
Executive Director (\$X/hr x %FTE/wk x #wks)	0							
Driver (\$X/hr x #hrs/wk x #wks)	0							
Program Director (\$X/hr x #hr/wk x #wks)	0							
Site Coordinator (\$X/hr x #hrs/wk x #wks)	0							
Volunteers (\$11/hr x #/wk x #vol x #wks)	0						0	
Total salaries:	0	0	0		0	0	0	0
Benefits	0	0	0			0		
Total salaries and benefits:	0	0	0	0	0	0	0	0
Total personnel	0	0	0	0	0	0	0	0
Travel and training:								
Mileage, parking and tolls	0							
Conferences and meetings	0							
Staff training	0							
Total travel and training	0	0	0	0	0	0	0	0
Equipment	0							
Catered food	0							
Food service supplies	0							
Food transport:								
Vehicle fuel	0							
Vehicle maintenance	0							
Vehicle insurance	0							
Vehicle licenses	0							
Total food transport	0	0.00			0	0	0	0
Site costs:								
Building rent	0						0	
Utilities	0						0	
Telephone	0						0	
Facility maintenance	0						0	
Facility supplies	0						0	
Equipment rental	0							
Insurance	0						0	
Incentives/gifts	0							
Computer related	0							
Office supplies	0						0	
Postage & delivery	0						0	
Recruitment Costs	0							
Dues, subscriptions, licenses	0							
Total site costs	0	0	0	0	0	0	0	0
Other costs:								
Marketing, advertising & PR	0					0		
Printing & publication	0					0		
Indirect costs	0			0	0	0	0	
Total other costs	0	0	0	0	0	0	0	0
Total Costs	0	0	0	0	0	0	0	0
Cost Per Meal	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Cost %	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

0

0

0

ATTACHMENT E: CONGREGATE MEAL SITE SERVICE PROTOCOL

CONGREGATE MEAL SITE SERVICE PROTOCOL

between

and

The purpose of the Service Protocol is to clarify each agency’s responsibilities and to make basic commitments to each other as to the particulars of this agreement in order to ensure compliance with Title III C Elderly Nutrition Program and California Department of Aging Title 22 elderly nutrition program standards and a successful program for the consumers.

AGREEMENT

- 1.1 _____, as the Contractor Agency for the elderly nutrition program services contract from the Area Agency on Aging, is pleased to work with the _____, as the Host Agency, to provide congregate meals service to seniors. The following describes our joint agreement to provide these services.
- 1.2 During the term of this contract, _____, The Contractor Agency is responsible for administration of the elderly nutrition programs according to Title III C and CDA Title 22 policies and procedures, following the contract narrative and budget approved by Area Agency on Aging.
- 1.3 Upon execution of this agreement, the Host Agency and Contractor Agency will exchange copies of insurance certificates to assure that necessary coverage is in place. When both parties sign the agreement, it will be in effect for the time period indicated below and may be renewed by July 1st of each year.
- 1.4 In case of emergency during meal service, the Host Agency shall be responsible to handle any emergency procedure that is necessary and appropriate. The Contractor Agency agrees to collaborate with Host agency to assist with the process.
- 1.5 This agreement may be terminated upon sixty (60) days written notice from either party. However the Area Agency on Aging must approve the request for cancellation.

PROGRAM/FACILITIES

- 2.1 The Host Agency will allow the Contractor Agency use of the building space located at _____ for _____ months and subject to mutually agreed upon terms of _____

extension. The Contractor Agency may use the facility for the meal service from _____ (days and hours of operation). The Host Agency reserves the right to negotiate with the Contractor Agency the use of the facility during the weekend and other times during the week. The facility includes: the dining room, tables and chairs, kitchen and office equipment, and designated storage area. The Contractor Agency shall be responsible for the proper use of the specific areas and related equipment while their staff is working in the building.

- 2.2 The Host Agency will provide the Contractor Agency with office space during hours of program operation, telephone to communicate with their main office, space to keep necessary kitchen equipment (e.g, refrigerator / freezer, steam table), and store program supplies in a secure manner.
- 2.3 The Nutrition Site Coordinator shall be a staff member (paid or volunteer) of the Host Agency to perform nutrition service duties as outlined in the contract and job description.
- 2.4 The Host Agency agrees to provide trained substitutes when the regular Site Coordinator is absent for training, sick leave or vacation. As time permits, the Site Coordinator will assist with special events, birthday and holiday lunch parties.
- 2.5 Decisions regarding the selection, training, discipline, and retention of the Site Coordinator will be made by the Host Agency. The Host Agency and Contractor Agency agree to exchange information about job performance and working conditions, and any complaints about personnel or services, in order to resolve issues that affect the quality of services at the site.
- 2.6 The Host Agency will be responsible for training and supervising volunteers involved in the congregate meals service. The Host Agency agrees to collaborate with Contractor Agency in determining training needs and supervising volunteers.
- 2.7 The Host Agency is responsible for obtaining a health permit. The Host Agency is also responsible for the health, safety, and maintenance of the facility by meeting the Department of Health standards and regulations. The Contractor Agency staff will monitor those standards and cooperate with the Host Agency's procedures to meet the requirements.
- 2.8 The Host Agency is responsible for janitorial services for the dining room, garbage disposal and pest control, general liability insurance, and rent for the site.
- 2.9 The Contractor Agency shall indemnify the Host Agency from and against all claims, costs and expenses connected to or resulting from injury to or death of any persons, or injury to third party property, to the extent caused by the gross negligence or willful misconduct of the Contractor Agency's staff members (paid or volunteer) during its time of operation.
- 2.10 Consumer Intake and enrollment into congregate meal program: Host Agency will be responsible for completing the Consumer Intake form and enrolling the consumers into the congregate meal program. Contractor Agency will be responsible for ensuring that eligible clients receiving meals are enrolled in the program.

MEALS/REPORTS

- 3.1 The Host Agency has notified the Contractor Agency of all the days the site will be closed to meal service at the beginning of the contract period. If meal service needs to be cancelled at the meal site for any special reason, the Host agency must inform the Contractor Agency at least 5

business days in advance so meal order can be adjusted. Meals will be delivered approximately _____ (no. of days) during this contract period for the congregate meals program: for a total of approximately _____ (no. of meals) with an average of _____ (no of meals) served on (days of operation) except on holidays and pre-arranged program closures. Host agency may negotiate with Contractor Agency for higher number of meals for special events. Meals will be served from _____ (time of service). All paper/service supplies necessary for this daily food service will be supplied by the Contractor Agency.

- 3.2 Food for the senior meal program will be delivered to the facility ready to serve. The Contractor Agency will be responsible for keeping statistics and other data as needed for AAA reporting.

DONATIONS

- 4.1 All donations and payments received for meals served will be the sole responsibility of the Contractor Agency, who will count the cash and handle the deposit and accounting according to Area Agency on Aging policies and procedures for this contract. The Contractor Agency will not solicit donations beyond the daily meal cost from the seniors, volunteers or staff of the Host Agency.

We agree to this Agreement as representatives for our agency:

Contractor Agency:

Name
Address

Signature: _____

Title: _____

Print Name: _____

Date: _____

Phone: _____

Fax: _____

Email: _____

Host Agency:

Name
Address

Signature: _____

Title: _____

Print Name: _____

Date: _____

Phone: _____

Fax: _____

Email: _____

ATTACHMENT F: SAMPLE SCOPE OF SERVICE

MARIN COUNTY DEPARTMENT OF HEALTH & HUMAN SERVICES DIVISION OF AGING AND ADULT SERVICES

SCOPE OF SERVICES July 1, 2012 - June 30, 2013

1. **Provider:**
2. **Program Name:** Congregate Nutrition
3. **Program Goal:** To maintain or improve the physical, psychological, and social well-being of older persons in Marin County through appropriate nutrition services.
4. **Program Objectives:**
 - ◆ At least 70% of clients will report “high” to “very high” satisfaction with the program.
 - ◆ At least 50% of clients will report improvements in their well-being as a result of participating in the congregate nutrition program.
5. **Program Definition:** Congregate nutrition services are provided to older persons 60 years and older in strategically located group settings and consist of procurement, preparation, and service of meals, as well as nutrition and health promotion education, health promotion programs, nutrition risk screening, and opportunities for socialization.
6. **Required Units of Services:**

Program:	congregate nutrition
Service Unit:	one meal
Minimum # meals to be served	
Unduplicated participants:	
7. **Reimbursement per meal:** \$
8. **Contract Award Amount:** \$
Title IIIC Congregate Nutrition Program \$
9. **Standards:**
 - a. Meals must include a minimum of one third of the current Dietary Reference Intakes (DRIs) as established by the Institute of Medicine National Academy of Sciences, follow the current Dietary Guidelines for Americans by U.S. Department of Health and Human services and U.S. Department of Agriculture, and reflect cultural and ethnic dietary needs of participants, when feasible and appropriate.
 - b. Menu and health and safety requirements must at minimum comply with the Elderly Nutrition Program regulations under CCR, Title 22, Division 1.8, Chapter 4, and Article 6. Menus must be planned for a minimum of five (5) weeks and certified by the AAA prior to use.
 - c. Menus must be planned by Registered Dietitian (R.D.), registered by the Commission on Dietetic Registration and qualified as specified in Sections 2585 and 2586, California Business and Professions Code.
 - d. Menus must follow the California 1600 calorie component meal pattern developed to reflect the new DGA requirements and one of the following two meal patterns: 1) The Dietary Approaches to Stop Hypertension (DASH) diet, 2) The USDA Food Guide meal pattern.
 - e. Weekly, fat calories must not exceed 30%, and sodium content not to exceed 1,000 mg per average meal. Menu items that exceed 1,000 mg sodium must be identified on the menus.

10. **SERVICE CONTRACTOR shall have the capacity to conduct, at a minimum, the following activities:**
- a. Determine client eligibility according to Older American’s Act Regulations. Eligible service population means individuals 60 years of age or older, with emphasis on those in economic and social need with particular attention to low income minority individuals and older individuals residing in rural areas. [OAA, Section 305 (a)(2)(E)][Title 22, CCR, Sections 7125, 7127, 7130, and 7135].
 - b. Comply with applicable regulations and standards set forth in the Marin County Division of Aging and Adult Services nutrition policies and procedures. Comply with Title III program requirements in the Older Americans Act (OAA 42 USC Section 3001-3058), Code of Federal Regulations (45 CFR XIII, 1321); Title 22, California Code of Regulations (CCR), Section 7000 et seq.; California Retail Food Code; California Department of Aging Program Memoranda.
 - c. Comply with additional standards set forth by the Division of Aging and Adult Services, as approved by the Marin County Commission on Aging, which include the following:
 1. Compliance with federal standards for nutrition program operations for congregate meal sites.
 2. Average minimum of 20 participants is needed per site, per meal day over a 6 month period.
 3. The sponsoring agency is expected to provide a site manager (paid or unpaid).
 4. Meal program is available to anyone who makes a reservation. Host site must be welcoming and open to everyone.
 - d. Conduct quarterly safety and sanitation monitoring of the caterer’s kitchen and site operation.
 - e. Show proof of Food Handler Certification within 60 days of commencement of this contract (California Uniform Retail Food facilities Law §113716).
 - f. Prepare and submit, in a timely manner, all required reporting – monthly financial statement, monthly MIS and Project Income by program and congregate site, and quarterly in-service training and nutrition education report for volunteers, paid staff, clients and caterer. Monthly invoices must be submitted to the Division of Aging and Adult Services no later than the **15th of the month** for the month prior.
 - g. Participate in the evaluation of the congregate nutrition program. Evaluation may entail a review of the financial records, fundraising strategies, marketing and outreach, and other related program activities. Continued funding of the program will be determined by the results of the evaluation, as agreed upon by the Contractor and the Division of Aging and Adult Services
 - h. Increase use of environmentally sound methods in meal service operation and delivery.
 - i. Review suggested meal donation rate for approval by the Commission on Aging and the Division of Aging and Adult Services staff prior to implementation. Use project income generated, or voluntary contributions received from participants to increase the service level or facilitate access to service.
 - j. Include the following statement in all publications and written materials developed by the program: “Funding for this program, at least in part, is made available by the Older Americans Act, administered locally by the Marin County Department of Health and Human Services, Division of Aging and Adult Services.”
 - k. Attend all mandatory contractors’ meetings scheduled by the Division of Aging and Adult Services.
 - l. Serve, the number of minority elders at a minimum, in the same proportion as represented in Marin's older population according to the most recent US Census.
11. **Minority Service Priority:** [pursuant to Older Americans Act Sec. 306. (a)(5)(A)(ii)]
In order to satisfy the service needs of low income minority individuals, the contractor will give priority to minority persons when hiring new staff or recruiting new volunteers as permitted by law.
12. **Services to lesbian, gay, bisexual, and transgender older adults:** [pursuant to the Older Californians Equity and Protection Act (AB 2920)]: provider must ensure that programs and services are available to all older adults regardless of sexual orientation and gender identity. Evaluation of outreach efforts to gay, lesbian, bisexual, and transgender older adults will be included in the Division of Aging and Adult Services contract monitoring requirements.

13. **Congregate meal locations:** have at least one meal site in each of the following cities/areas and their vicinity: Central San Rafael, the Canal, and Novato. The congregate meal site must be located in an area easily accessible to the target population and at a facility that meets all American Disabilities Act (ADA) requirements.
14. **Congregate meal site service protocol:** signed Congregate Meal Site Service Protocol agreement between the contractor and the site must be in place. The purpose of the Service Protocol is to clarify each agency's responsibilities and make basic commitments to each other as to the particulars of the agreement in order to ensure compliance with Title III C Elderly Nutrition Program and the California Department of Aging Title 22 Elderly Nutrition Program Standards and a successful program for the consumers. The Division of Aging and Adult Services must have copies of the signed agreements in file.
15. **DHHS Additional Funding.** Additional Funding in the amount of \$ will be provided after six months of satisfactory contract performance. The total County of Marin Department of Health and Human Services additional funding may be invoiced for the full amount **before 6/30/13.**