

*REQUEST FOR PROPOSAL*  
*Fiscal Years 2008-2011*

**Southern Crescent**  
**AREA AGENCY ON AGING**  
**Post Office Box 1600**  
**13273 Highway 34 East**  
**Franklin, Georgia 30217**

**REQUEST FOR PROPOSAL**  
**FOR**  
**Home and Community Based Services (HCBS)**  
**Alzheimer's Adult Day Care**

**RFP #**

**04-ALZ-ADC-08**

**For all questions about this RFP contact:**

**Bobby Buchanan, AAA Director**

**[bbuchanan@dhr.state.ga.us](mailto:bbuchanan@dhr.state.ga.us)**

**Released On:**

**December 01, 2006**

**Due On:**

**January 31, 2007**

**4:00 PM**

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**1.0 INTRODUCTION**

**1.1. Purpose of Procurement Process**

The Southern Crescent Area Agency is requesting proposals from qualified offerors capable of providing Home and Community Based Services (HCBS) Alzheimer's Adult Day Care Services.

The successful offeror will provide:

Alzheimer's Adult Day Care Services to clients diagnosed with Alzheimer's disease or other related disorder. Services will include personal care for dependent elders in a supervised, protective, and congregate setting during some portion of a day. Services offered in conjunction with adult day care include social and recreational activities, training, counseling, meals, and services such as rehabilitation, medications assistance and personal care services.

Additional requirements: Include but is not limited to in service training for staff, monitoring of staff activities, monitoring of program elements, attend required trainings and scheduled meetings, complete and submit required reports in a timely manner, provide required supplies and/or equipment as needed to complete program duties.

**1.2. Vision, Mission, and Values**

Southern Crescent Area Agency on Aging is your community's gateway to a coordinated system of services, including long term care, promoting independence, and well being for older Georgians, their families, and caregivers in their communities.

The vision of the Administration on Aging (AoA) for older people is based on the American value that dignity is inherent to all individuals of our democratic society, and the belief that older people should have the opportunity to fully participate in all aspects of society and community life, be able to maintain their health and independence, and remain in their own homes and communities as long as possible.

The mission of AoA is to promote the dignity and independence of older people and to help society prepare for an aging population. We do this by serving as an advocate for older people, and by overseeing the development of a comprehensive and coordinated system of care that is responsive to the needs and preferences of older people and their family caregivers.

AoA values include:

- Listen to older people and our partners who serve them
- Capitalize on the experience and unique attributes of our network

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- Identify and promote the replication of the “best” the network has to offer in the service models and systems of community care
- Produce measurable outcomes that significantly impact the well-being of older people and their family caregivers
- Respond to the changing needs and preferences of our diverse and growing elderly population
- Take advantage of external opportunities to advance our strategic goals and priorities

Help position our community-based aging services provider network to enhance the responsiveness of our health and long term care system to the needs and preferences of older consumers

1.3. **Schedule of Events** – This RFP will be governed by the following schedule:

	Dates
Release of RFP	December 01, 2006, 4:00PM
Deadline for written questions	December 08, 2006
Answers to written questions posted	January 09, 2007
Offeror’s Conference	January 16, 2007, 9:30AM, Chattahoochee-Flint RDC
Training on Uniform Cost Methodology	January 16, 2007
Proposals due	January 31, 2007
Contract award	March 01, 2007
Contractor begins work	July, 2007

1.4. **Restrictions on Communication with Staff**

From the issue date of this RFP until a contractor is selected and the selection is announced, Offerors are not allowed to communicate for any reason with any AAA staff, except through the Issuing Officer named herein, or during the Offeror’s conference, or as provided by existing work agreement (s). The AAA reserves the right to reject the proposal of any Offeror violating this provision. All questions concerning this RFP must be submitted in writing (fax or email may be used) to the Issuing Officer. No questions will be accepted except in written format. Only written responses will be binding upon the AAA.

1.5. **Definition of Terms**

Request for Proposal (RFP); Area Agency on Aging (AAA), Notice of Award; Uniform Cost Methodology (UCM); State Fiscal Year (SFY); Alzheimer’s (ALZ); Home and Community Based Services (HCBS).

1.6. **Contract Terms**

The contract will be on a State of Georgia fiscal year (SFY 2008) basis (July 1, 2007- June 30, 2008). The contract will have options to renew annually, renewal not greater

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than end of the current Area Plan cycle (July 1, 2007 - June, 2011); additional contract periods will have a contract end date of June 30 each year. The annual renewal of the Offeror's contract shall be based on the availability of funds and the Offeror's successful contract performance the preceding year. Contract award will be by the issuance of a Notice of Award. Renewals will be accomplished through the issuance of Notice of Award Amendments.

## **2.0 MANDATORY REQUIREMENTS**

This section identifies all mandatory requirements which must be present in the proposal before further consideration will be given. Offeror's response indicates the page number(s) where each mandatory requirement is substantiated.

### **2.1. Offeror's Information Form**

Offeror must submit completed Offeror's Information Form. (Appendix 9.1)

### **2.2. Offeror's Qualification Requirements**

Offeror must have a minimum of 4 years experience providing Alzheimer's Adult Day Care Services.

### **2.3. Business Requirements**

Offeror must meet all requirements set forth in the DHR Division of Aging Services Operations Manual. The Manual is available online at <http://aging.dhr.georgia.gov/portal/site/DHR-DAS/menuitem.ad8cceace9853e248e738510da1010a0/?vgnextoid=4de3e6ccd9d30010VgnVCM100000bf01010aRCRD&vgnnextchannel=2bb39b953be20010VgnVCM100000bf01010aRCRD>. General Service Requirements § 202 Program Guidelines and Requirements; § 302 Adult Day Care/Day Health Requirements.

### **2.4. Mandatory Submission Requirements**

Offeror must have completed all budget documents and narrative including revenue plan and units/persons/cost chart; Uniform Cost Methodology (UCM) Spreadsheet; must have responded to all sections of the proposal; must have signed all required forms.

### **2.5. Budget Requirements**

Offeror must submit a narrative to discuss costs and/or revenue and persons/units served. Must have completed and submitted UCM spreadsheet.

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3.0 **TECHNICAL PROPOSAL** – This section identifies the information which must be submitted in the Technical Proposal. Offeror must demonstrate their ability to satisfy all Qualifications and Technical Requirements to perform the required services. The technical Proposal must be structured in the following order and labeled with the corresponding titles stated below using the same outline numbers.

3.1. **Company Structure** - The Offeror will include the following information:

- a. Offeror must submit an organizational chart displaying its overall business structure.
- b. Offeror shall include in the proposal the legal form of their business organization, the state of incorporation (if a corporation), the business office location, hours of operation, and the contact name during the term of any resulting contract.
- c. Offeror shall submit a list of Board of Directors and/or Advisory Board members, including their occupations and addresses.

3.2. **Experience**

The Offeror must have at least four (4) full consecutive years experience as an Alzheimer's Adult Day Care Services provider. The Area Agency on Aging reserves the right to verify all information submitted regarding Offeror's experience, education and other qualifications.

3.2.1 The Offeror will provide a list of all organizations for whom similar services, as detailed in the RFP, have been provided during the past four (4) years. This list will include:

- a. Dates of Service
- b. Name of contact person
- c. Title of contact person
- d. Phone number of contact person
- e. Description of the work performed
- f. Time period of the project or contract
- g. Staff months required
- h. Contract Amount
- i. Customer reference (including contact person, e-mail address and current telephone number)

3.2.2 The Offeror will also disclose any services terminated by the organizations and the reason(s) for termination.

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3.2.3 Offeror will provide details of its experience, minimum of four (4) years, as required above. Information submitted should demonstrate that the Offeror has sufficient experience to successfully meet the requirements of this program or service.

- A. Offeror will submit detailed documents of its experience as required above, to include two (2) letters of recommendation from the state or local agency where the experience was obtained which shall meet the following requirements:
  - 1. Must be submitted on letterhead of the party submitting the recommendation and must contain current telephone numbers, mailing address, and e-mail addresses for points of contact.
  - 2. Contact individuals submitting recommendations must be current employees of the organization and authorized to make recommendations on behalf of the organization.
  - 3. Contact individuals should be able to attest to the Offeror's qualifications relevant to experience in providing services similar to those contained in this RFP.
  - 4. Letters of Recommendations shall be dated no more than six (6) months prior to the proposal submission date

3.3. **Financial Stability and Cash Flow** – The Offeror will provide financial information that would allow proposal evaluators to ascertain the financial stability of the agency.

- A. A copy of the Offeror's most recent audit report.
- B. If a private company, the Offeror will provide a copy of their most recent internal financial statement, and a letter from their financial institution, on the financial institution's letterhead, stating the Offeror's financial stability.
- C. Offeror's financial plan to maintain adequate cash flow without interruption to services pending reimbursement from this contract
- D. A description of any cash flow problems in the recent past that could not be resolved within 90 days.

3.4. **Business Litigation** – The Offeror will disclose any involvement by the organization or any officer or principal in any material business litigation within the last five (5) years. The disclosure will include an explanation, as well as the current status and/or disposition. Failure to fully disclose or accurately state litigation may result in the proposal not being further reviewed.

3.5. **Scope of Services for each Program** – Reference the Scope of Services for HCBS Alzheimer's Adult Day Care Service in Appendix 9.11.

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**4.0 BUDGET PROPOSAL**

- 4.1. Offeror must provide a Budget Narrative to explain projected cost and local revenue leveraged on behalf of the program.
- 4.2. Offeror completes the Revenue Plan and Unit/Persons Served (chart – Appendix 9.7) and details the revenue available to support the each program or service. If this is a unit cost reimbursed service, then it must match the unit cost as detailed on the Uniform Cost Methodology Spreadsheet. If this is a line item reimbursed service, then the total allowable costs should be the same as detailed on the Uniform Cost Methodology Spreadsheet.
- 4.3. Offeror has completed the Uniform Cost Methodology Spreadsheet as provided in (PI – SFY 2007-04 – Appendix 9.10) and completed the UCM spreadsheet as required.
- 4.4. Budget Evaluation Criteria is found in the Budget Proposal Section

**5.0 PROPOSAL SUBMISSION**

- 5.1 **Packaging of Proposals** – The Applicant’s proposal in response to this RFP must be divided into two appropriately labeled and sealed packages. Return address must include Contact Name, Name of Company, address, RFP #, and phone number. Do not include cost information in the technical proposal – must have separate copies and/or CDs for 3.0 Technical Proposal and 4.0 Budget Proposal.
- 5.2 **Number of Proposal Copies** – Submit one original with signatures marked “Original” and five (5) hard copies and include one CD in Microsoft Office Suite for Word and Excel, 2000 version or later. (Example: 1)Technical Proposal – one(1) original (marked original); four (4) hard copies; one (1) CD in Microsoft Word format. 2)Budget Proposal - one(1) original (marked original); four (4) hard copies; one (1) CD in Microsoft Excel format.)
- 5.3 **Submission of Proposals**
  - 5.3.1 **Issuing Office** - The Southern Crescent Area Agency on Aging, P.O. Box 1600, 13273 Highway 34 East, Franklin, Georgia 30217 issues this Request for Proposal (RFP). The Area Agency on Aging is the sole point of contact for this RFP and subsequent revisions.
  - 5.3.2 **Rejection of Proposal:** The Southern Crescent Area Agency on Aging reserves the right to reject any or all proposals, or to award in whole or in part if deemed to be in the best interest of the AAA to do so. The Director of the Area Agency shall have authority to award orders, contracts or agreements to the Offeror’s that offer the best proposal to the AAA, cost and other factors considered.
  - 5.3.3 **Questions and Inquiries:** It is the policy of the Area Agency to accept questions in writing or by e-mail from any and all Offeror’s interested in

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implementing the services identified in the RFP. Questions should be submitted to Bobby Buchanan, AAA Director. The AAA will transmit to all responders all questions and the Area Agency's responses according to the Schedule of dates.

- 5.3.4 **Response Date:** In order to be considered for selection, proposals must arrive at the issuing office on or before the date and time specified. Offerors choosing to mail proposals should allow for normal mail delivery to ensure timely receipt of their proposal by the Area Agency. Late proposals will not be evaluated.
- 5.3.5 **Revisions to Request for Proposals:** The Area Agency reserves the right to revise the Request for Proposal at any time prior to award. In the event it becomes necessary to revise any part of this RFP, information regarding revisions will be provided to all Offerors.
- 5.3.6 **Submitted Proposals:** In order to be considered for selection, offerors must submit a complete response to this RFP including, at a minimum, all the mandatory requirements, technical proposal, budget proposal, and letter of transmittal concerning assurances. One original and five (5) copies of each proposal must be submitted to the issuing office if mailed or hand-delivered. The submitting agency shall make no other distribution of the proposals.
- 5.3.7 **Acceptance of Proposal Content** – The contents of the proposal of the successful bidder will become a part of any contract awarded as a result of these specifications.

## 6.0 ASSURANCES

### 6.1 Letter of Transmittal

All offerors are required to submit a mandatory transmittal letter, which shall be in the form of a standard business letter, which shall be signed by an individual authorized to legally bind the offer. The terms and conditions of the procurement are included. The Letter of Transmittal shall include:

- A. If a corporation, a statement indicating that the offeror is registered and in good standing with the Georgia Secretary of State to do business in the State of Georgia as state in §3.0. All proposed subcontractors must be identified, and a statement included indicating the exact nature and amount of work to be done by the prime contractor, and by each subcontractor, as measured by price.
- B. A Statement that the offeror does not discriminate in its employment practices with regard to race, religion, age (except as provided by law), marital status, political affiliation, national origin, or disability. (Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, as amended; the Americans with Disabilities Act of 1990).
- C. A statement that the proposal meets the requirements set forth in the RFP plus any amendments. Amendments, if any, must be specified.

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- D. A statement that the person signing the proposal is the person in the offeror organization responsible for, or authorized to make, decision as to the prices quoted.
- E. Certifications that prices proposed have been arrived at independently without collusion, communication, or agreement relating to such prices with any other offeror or competitor.
- F. If the proposal deviates from the detailed requirements of this RFP, the transmittal letter must identify and explain all such deviations that appear in the body of the proposal. The Area Agency on Aging reserves the right to reject any proposal containing deviations, or require modifications before acceptance.
- G. If the use of subcontractor(s) is proposed, a statement from each subcontractor must be appended to the transmittal letter, signed by an individual authorized to legally bind the subcontractor, and stating:
  - 1. The general scope of work to be performed by the subcontractor;
  - 2. The subcontractor's willingness to perform the work indicated; and
  - 3. That the subcontractor does not discriminate in its employment practices with regard to race, religion, age (except as provided by law), sex, marital status, political affiliation, national origin, or disability.
- H. A statement indicating that the organization and its subcontractors, if any, will be compliant with the Health Insurance Portability and Accountability Act (Public Law No 104-191, 110 Stat. 1936), including its Privacy, Security and Electronic Data Interchange standards and regulations and any and all signed business associate or other agreements for the Area Agency on Aging and the Department of Human Resources. Failure to sign the business associate agreement or to be compliant with HIPAA laws and regulations or Division or AAA policy will be a basis for rejection. Additionally, since federal funds may be included, an RFP Signature page, Certification Regarding Lobbying and Certification Regarding Debarment are included for signature. Failure to sign these certification forms will be a basis for rejection.
- I. Statement indicating that Contractual and Administrative Assurances required by the RFP are given.
- J. Statement indicating the organization's solvency to meet performance requirements with the most recent certified financial audit attached.
- K. The name, address, and telephone number of the individual(s) who can be contacted from 8:00 a.m. to 5:00 p.m. during business days for questions regarding the proposal.
- L. A statement that the offeror accepts the Area Agency on Aging's sole right to cancel the RFP at anytime or amend the RFP before the due date for proposals.
- M. A statement that offeror accepts the Area Agency on Aging's sole right to alter the time tables for procurements as set forth in the RFP.
- N. A statement that all responses become the property of the Area Agency on Aging and will not be returned to the offeror. The Area Agency on Aging will have the right to use all ideas or adaptations of ideas contained in any response received. Selection or rejection of the response will not affect this right.

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- O. A statement that the offeror accepts the terms, conditions, criteria and requirements set forth in the RFP.
- P. The name and address of offeror to be used for all notices sent by the Area Agency on Aging.
- Q. A statement that no contact, direct or otherwise, has occurred with any employee of the Area Agency on Aging or DHR Division of Aging Services staff with direct involvement with the RFP process or program information, except as permitted by the RFP. Further, a statement that any subcontractor listed by the offeror complied with the restriction on communications as well.
- R. A statement that no relationship exists nor will exist during the contract period, should offeror enter into a contract with the Area Agency on Aging that interferes with fair competition or is a conflict of interest.
- S. A statement that no relationship exists between the offeror and another person or organization that constitutes a conflict of interest with respect to an existing contract with the AAA.
- T. A statement that no claim will be made for payment to cover costs incurred in preparation of the submission of the proposal or any other associated costs.
- U. Prior to award, the apparent successful Offeror will be required to enter into discussions with the Area Agency on Aging to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within one (1) week of notification, if not, this could lead to rejection of the Offeror's proposal and discussions initiated with the second highest scoring offeror.
- V. An award will be made to the offeror whose response is determined to be the lowest responsible bid and most advantageous to the Area Agency on Aging, taking into account price and other evaluation criteria. Staff or other agencies and consultants may be involved in the evaluation of the responses. The Area Agency on Aging reserves the right to reject any and all responses submitted.

**7.0 TERMS AND CONDITIONS**

- 7.1. **RFP Amendments** – The AAA reserves the right to amend the RFP prior to the proposal due date and provide notification of any amendments through written correspondence.
- 7.2. **Proposal Withdrawal** – A submitted proposal may be withdrawn prior to the due date by written request to the Issuing Officer. A request to withdraw a proposal must be signed by an authorized individual.
- 7.3. **Cost of Preparing a Proposal** – The cost for developing the proposal is the sole responsibility of the Offeror. The Area Agency will not provide reimbursement for such costs.
- 7.4. **Sample Contract** – The Sample Contract, which the Area Agency intends to use with the successful Offeror, is attached to this RFP in the Appendix. Exceptions to the

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Contract should be identified and submitted with the Offeror's proposal. Proposed exceptions must not conflict with or attempt to preempt mandatory requirements of the RFP. Prior to award, the apparent winning Offeror will be required to enter into discussions with the AAA to resolve any contractual differences before an award is made. These discussions are to be finalized and all exceptions resolved within one (1) week of notification. Failure to resolve contractual differences will lead to rejection of the Offeror's proposal. The AAA reserves the right to modify the Contract to be consistent with the successful offer and to negotiate with the successful Offeror other modifications, provided that no such modifications affect the evaluation criteria set forth herein, or give the successful Offeror a competitive advantage.

7.5. **Conflict of Interest** – If an Offeror has any existing client relationship that involves the AAA, the Offeror must disclose each relationship.

7.6. **Minority Business Policy** – It is the policy of the AAA that minority business enterprises shall have a fair and equal opportunity to participate in the AAA procurement process. Therefore, the AAA encourages all minority business enterprises to compete for, win and receive contracts for services.

7.7. **Reciprocal Preference Law (OCGA 50-5-60(b))** – For the purposes of evaluation only, Offerors resident in the State of Georgia will be granted the same preference over Offerors resident in another State in the same manner, on the same basis, and to the same extent that preference is granted in awarding bids for the same goods or services by such other State to Offerors resident therein over Offerors resident in the State of Georgia. NOTE: For the purposes of this law, the definition of a resident Offeror is one who maintains a place of business with at least one employee inside the State of Georgia. A post office box address will not satisfy this requirement.

## 8.0 EVALUATION PROCESS

8.1 **Administrative Review** – The proposals will be reviewed by the designated staff for the following administrative requirements: 1) separately sealed Mandatory Requirements/Technical Proposal and Budget Proposal submissions. 2) All required documentation has been submitted. 3) The Technical Proposal does not include any information from the Budget Proposal. 4) All documents requiring an original signature have been signed and are included.

8.2 **Technical Proposal Evaluation** – Mandatory Requirements Review and Scope of Services will be reviewed by the Technical Evaluation Team for quality. Technical proposal will be evaluated and scored based on a ratio of the total points available for both technical and budget sections. The evaluation formula will utilize a 1,000 point evaluation process.

8.3 **Budget Proposal Evaluation** – Offeror will use only the Budget Proposal forms provided with this RFP. Budget proposals will be evaluated and scored based on a

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ratio of total points available for both technical and budget sections. The evaluation formula will utilize a 500 point evaluation process.

- 8.4 **Identification of Apparent Successful Offeror** – The resulting Budget Proposal score will be combined with the Technical Proposal score. The Applicant with the highest combined technical and budget score will be identified as the apparent successful Applicant.
- 8.5 **Rejection of Proposals/Cancellation of RFP** – The Area Agency reserve the right to reject any and all proposals, to waive any irregularity or informality in a proposal, and to accept or reject any item or combination of items, when to do so would be to the advantage of the Area Agency. It is also within the right of the Area Agency to reject proposals that do not contain all elements and information requested in this document. The Area Agency reserves the right to cancel this RFP at any time. The Area Agency will not be liable for any cost/losses incurred by the Offerors throughout this process.

9.0 **APPENDIX**

- 9.1. **Offeror's Information Form** – Form must be completed and signed.
- 9.2. **Vision, Mission, Values** – Chart including Administration on Aging, Division of Aging Services and Area Agency on Aging Vision, Mission and Values to align the aging network to common vision, mission and values.
- 9.3. **Sample Contract** – Draft of the contract proposed between the AAA and potential Offeror.
- 9.4. **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion** – Form must be signed
- 9.5. **Certification Regarding Lobbying** – Form must be signed
- 9.6. **Health Insurance Portability and Accountability Business Associate Agreement** – Form must be signed
- 9.7. **Revenue Plan, Units/Persons and Cost Chart** – Chart must be completed and included in the Budget proposal
- 9.8. **Division of Aging Services - Service Definitions (PI-SFY 2007-03)** – Copy of the Program Instruction
- 9.9. **Division of Aging Services - Fund Sources (PI-SFY 2007-03)** – Copy of the Program Instruction

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9.10. **Uniform Cost Methodology (PI-SFY 2007-04)** –Program Instruction and the appropriate spreadsheet for Offeror to complete this budget requirement for the Budget Proposal

9.11. **HCBS Scope of Services** – Clear and specific performance and delivery expectations. **Performance Goals, Objectives and Performance Measure** must be included in this section. **Evaluation Criteria** is added to this section for each specific program or service.