



**AREA AGENCY ON AGING**  

---

**REGION ONE, INCORPORATED**

# **REQUEST FOR PROPOSALS**

## **March 2024**

### **MARICOPA COUNTY**

Adult Day Health Care  
Case Management  
Family Caregiver Program: Peer Counseling (Support Groups)  
Family Caregiver Program: Grandparents Raising Grandchildren  
Home Delivered Meals  
Home Care: Attendant Care, Homemaking, Personal Care  
Legal Assistance  
Respite  
Senior Center, Congregate Meals and Multipurpose Center Operations  
Transportation: Senior Center Transportation, Public Transit  
Volunteer Management Services

AREA AGENCY ON AGING, REGION ONE  
1366 East Thomas Road, Suite 108  
Phoenix, Arizona 85014

## TABLE OF CONTENTS

SECTION I.	<u>Legal Advertisement</u> .....	3
SECTION II.	<u>RFP Schedule</u> .....	4
SECTION III.	<u>RFP Submittal Packet Instructions</u> .....	5
SECTION IV.	<u>Guide to Requests for Proposals and Contracts</u> .....	7
Section V.	<u>Scopes of Work &amp; Service Specifications</u> .....	12

### **PLEASE NOTE:**

A digital PDF copy of your proposal must be submitted to:

[FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org) by 2:00 p.m. Friday, April 12, 2024.

### **LATE PROPOSALS WILL NOT BE ACCEPTED.**

\*\* All templates required to complete the proposal are available for download at:  
[www.aaaphx.org](http://www.aaaphx.org) in the About/Reports and Plans section of website.

All templates will **no longer be available for download** as of: 1:00 p.m. on Friday, April 12, 2024.

## SECTION I

### Legal Advertisement Notice of Request for Proposals (in compliance with A.R.S. section 41-2533)

The Area Agency on Aging, Region One, Incorporated, hereby solicits proposals from qualified offerors to deliver services to older adults, persons with disabilities and adults with long term care needs in Maricopa County, Arizona.

Contracts awarded pursuant to this Request for Proposals (RFP) will be for a term of twelve months, with the Area Agency on Aging, Region One (AGENCY) having the exclusive and discretionary option to renew for up to four additional terms. The AGENCY is not required to renew for any term. The Contracts awarded pursuant to this RFP are scheduled to begin July 1, 2024 for Fiscal Year 2025.

Proposals will be accepted for the following services to be provided in the following Planning and Service Areas of Maricopa County:

- Adult Day Health Care
- Case Management
- Family Caregiver Program: Peer Counseling
- Family Caregiver Program: Grandparents Raising Grandchildren
- Home Delivered Meals
- Home Care: Attendant Care, Homemaking, Personal Care
- Legal Assistance
- Respite
- Senior Centers, Congregate Meals, Multipurpose Center Operations
- Transportation
- Volunteer Management Services

The official RFP materials will be available on March 11, 2024 at 4:00 pm until April 12, 2024 at 1:00 pm. The submission deadline is April 12 2024 at 2:00 pm.

The proposal must be submitted to [FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org) no later than 2:00 pm, April 12, 2024. Any proposal submitted after 2:00 pm is automatically disqualified and rejected for failure to meet the submission deadline.

A Proposal Training meeting will be held on March 18, 2024 at 2:30 – 4:00 pm, by Zoom <https://us06web.zoom.us/j/82304429143?pwd=r90d0gQ9hvMYbGqas6mUu2aBaNlcbd.1> in compliance with A.R.S. 41-2501 et. seq. and A.A.C. R2-7-101 et. seq. This training will review the RFP materials for all service areas and address any questions from interested parties. Additional questions concerning this RFP can only be directed to [FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org) from March 11 to April 11, 2024 4:00 pm MST.

**No questions will be acknowledged or responded to after 4:00 pm April 11, 2024.**

SECTION II  
RFP Schedule

DATE	TASK
March 11	Email RFP Application Letter to FY2024 service providers under contract
March 11	Post Legal Notice of RFP for FY2025 to Agency website
March 18	Conduct RFP Training Meeting by Zoom 2:30 – 4:00 p.m. <a href="https://us06web.zoom.us/j/82304429143?pwd=r90d0gQ9hvMYbGgas6mUu2aBaNlcbd.1">https://us06web.zoom.us/j/82304429143?pwd=r90d0gQ9hvMYbGgas6mUu2aBaNlcbd.1</a>
April 12	RFP submissions due by 2:00 p.m MST
May 29	Notification of contract awards emailed to winning providers
June 7	FY2025 Contracts issued to winning providers

**SECTION III**  
**RFP SUBMITTAL PACKET INSTRUCTIONS**

1. Proposal Deadlines
  - a. Electronic proposals must be submitted to [FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org) by **2:00 p.m., MST, Friday April 12, 2024.**
  - b. **Late proposals will not be accepted.**
2. Special Instructions
  - a. The RFP Submittal templates may be downloaded from the AGENCY website.
3. Proposal Application Letter
  - a. The first page of your proposal must be the PROPOSAL APPLICATION LETTER. Check each service that you propose to provide.
  - b. For **Home Care Services only**: Check each specific subcategory of service that you propose to provide.
  - c. Certify compliance with the statements, by completing the information for the authorized signatory of the proposer.
4. Organizational Information & Documentation
  - a. Organizational Data, Contact Information, & Organizational Introduction: All information must be completed. If awarded a contract, this information will be incorporated into the contract.
    - i. Contractor FEI: this is the Federal Employee Identification number also known as the Employee Identification Number (EIN).
  - b. Background Information
    - i. Complete all information requests.
    - ii. Disclosure of Substantial Interest -
      1. For all privately held corporations, this must be completed to identify those persons and/or entities that have ownership or any financial relationship to the proposer.
      2. For nonprofit or governmental entities the Disclosure of Substantial Interest is not required.
  - c. Certificate of Debarment: If awarded a contract, Proposer is required to specifically sign a Certificate of Debarment which attests to all elements listed.
  - d. Assurances: There are multiple response options specific to each question. Check the response that applies to your agency.
  - e. Facility Locations: The Proposer must complete each section.
    - i. PROPOSER & FACILITY INFO. Enter any administrative office first, then identify all sites where services may be provided.
    - ii. DAYS & HOURS. Insert the days of the week and hours each day that services are provided at each site.
    - iii. TRANSPORTATION BOUNDARIES (if applicable).
      1. Adult Day Health Care: identify transportation service area, specifically identify the north, south, east, and west boundaries per service site.
      2. Home Delivered Meals: specifically identify the north, south, east, and west boundaries of your proposed maximum delivery area.

5. Proposed Service

Experience, Methodology & Qualifications

- a. The Experience, Methodology, and Qualifications must be completed for each service proposed as identified on the Proposal Application Letter.
- b. Answers should fully comply with DES Scopes of Work.
- c. All responses should be provided in the original proposal submission. **No amendments, additions or appendices will be accepted after the submission deadline.** Any information not bound with the completed proposal will not be considered.

6. Budgets

- a. **Senior Center Services:** Congregate Meals, Home Delivered Meals, Multipurpose Center Operations, and Transportation:
  - i. The budget templates are Excel files.
- b. **Other Services:** Case management, Family Caregiver Program: Grandparents Raising Grandchildren, Legal Assistance, and Volunteer Management Services
  - i. The budget templates are Excel files.

## SECTION IV

### Guide to Requests for Proposals and Contracts

A. Purpose

The Area Agency on Aging, Region One (the “AGENCY”) provides a comprehensive network of services and programs for older adults and adults with disabilities in Maricopa County to maximize their level of self-sufficiency. Services are targeted to those individuals with the greatest social and economic need through a network of service contracts with community-based private, non-profit, for-profit, and public agencies.

B. Service Contracts

1. The AGENCY contracts are performance-based. Providers are expected to adhere to program scopes of work, service specifications, and AGENCY directives; to maintain quality services; and to deliver the required number of service units in the manner prescribed in the contract and any contract extensions. Moreover, the provider must maintain service delivery records and submit the programmatic and financial reports indicated in contract operating manuals and/or in directives. The AGENCY will provide technical assistance and work with the provider to solve service delivery and problems.
2. The AGENCY seeks providers that have the ability to implement programming efficiently and effectively within the guidelines of the service specifications and methodology criteria.

C. Receipt of Proposals

A digital PDF of the proposal must be submitted to [FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org) no later than **2:00 p.m., MST, Friday April 12, 2024.**

***LATE PROPOSALS WILL NOT BE ACCEPTED.***

**IF THE EMAIL PDF IS SUBMITTED LATE, THE SUBMISSION IS AUTOMATICALLY DISQUALIFIED FROM THE RFP PROCESS.**

D. Criteria for Proposals

For a proposal to be considered it must meet the following criteria:

1. The proposal must be fully completed. Failure to submit all information for Experience, Methodology, & Qualifications, and budgets including addendums as applicable could result in the proposal being classified as "unacceptable" or rejected. It is the responsibility of all proposers to examine the entire proposal package and seek clarification of any item or requirement that may not be clear and to check all information for accuracy before submitting a proposal.
2. The proposal should make use of templates available for download at [www.aaaphx.org](http://www.aaaphx.org). Failure to use the AGENCY templates could result in an incomplete submission and/or disqualification.

E. Cancel or Reject Solicitations

The AGENCY reserves the right to cancel this solicitation and any or all applications may be accepted or rejected in whole or in part. The AGENCY also reserves the right to reissue all or any part of the RFP at a later date.

F. Proposal Review and Evaluation and Qualifications

1. Review

- a. Initial Review: the AGENCY staff will review each proposal for timeliness, completeness, and all required documents.
- b. Services Committee Review: A committee composed of members of the AGENCY Advisory Council and Board of Directors will review proposals and make formal contract award recommendations to the Advisory Council. The Committee may request proposers to make formal presentations and answer questions. A presentation is not required for all proposers.
- c. Advisory Council Review and Approval: The Advisory Council will review the recommendations of the Services Committee and make contract award recommendations to the Board of Directors.
- d. Board of Directors Review and Approval: The AGENCY Board of Directors will review the recommendations of the Advisory Council and select winning proposals for contract awards.

2. Evaluation

The AGENCY reserves the right to use information provided in the proposals, previous experience with the AGENCY, investigation with the Better Business Bureau, or other agencies that have previously done business with the prospective provider, licensure agency reviews, and any presentations as requested by the Services Committee to determine the applicant's potential for acceptable performance of proposed services. A pre-award survey of the offeror's facilities, staff, records, and finances may be conducted.

To be considered for a contract with the AGENCY, each proposer must demonstrate the ability and willingness to meet the following criteria:

1. Provide information that demonstrates the provider's experience relative to the proposed services.
2. Hold or be able to obtain all necessary certifications and licensures, and to comply with all state and local requirements prior to July 1, 2024.



3. Hold and maintain all required insurance levels and criteria throughout the FY2025 contracting period.
4. Have sufficient financial resources to operate pending AGENCY reimbursement up to 90 days from date of service.
5. Comply with the Arizona DES Scope of Work statements and AGENCY Service Specifications, policies, manuals and directives and all contract provisions.
6. Have the organizational capacity and willingness to report accurate fiscal and program data monthly and on time, as required by contract and/or as requested.
7. Comply with assessment and program evaluations.

Proposals will be reviewed based on the following criteria and point system.

- a. Organization Information and Service Experience, Methodology, & Qualifications (35 points possible). Poor = 1 pt. Fair = 2 pts. Average = 3 pts. Good = 4 pts. Excellent = 5 pts.

<b>REQUEST FOR PROPOSAL 2025 EVALUATION CRITERIA</b>						
<b>Proposal Evaluation Objectives</b>		<b>Poor</b>	<b>Fair</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>
1	Fully describes the organizational mission, structure.					
2	Demonstrates the competence and qualifications to perform the services. License(s) is in good standing.					
3	Demonstrates a history of service to older adults.					
4	Responses are complete and sufficiently detailed.					
5	Includes methods appropriate to services be provide.					
6	Staff training and education are appropriate to the type of program to be provided.					
7	Demonstrates standards of performance and assurance mechanisms to be followed by the proposer.					

- b. Budget Section (as applicable) (25 points possible)  
 Poor = 1 pt. Fair = 2 pts. Average = 3 pts. Good = 4 pts. Excellent = 5 pts.

<b>REQUEST FOR PROPOSAL 2019 EVALUATION CRITERIA</b>						
<b>Proposal Evaluation Objectives</b>		<b>Poor</b>	<b>Fair</b>	<b>Average</b>	<b>Good</b>	<b>Excellent</b>
1	The descriptions/bases for revenues and expenses included in the Itemized Service Budgets are complete and adequate.					
2	Expenses/costs are reasonable based on service standards and consistent among worksheets.					
3	Proposer has sufficient financial and in-kind resources to meet required 10% match.					
4	The amount requested is reasonable for the service and clients projected.					
5	Agency budget demonstrates that the proposer has adequate financial resources and ongoing capability for providing the services pending reimbursement.					

I. Contract Awards

1. Duration of Contracts

All contracts are written for a period of one year coinciding with the fiscal year July 1 - June 30. At the option of the AGENCY, these contracts may be renewed for a maximum of four additional years. The AGENCY may request revised budgets, methodologies, and documents any time during the additional terms.

2. Performance of Contracts

During the performance of any awarded contract, the AGENCY may in its discretion interrupt the assignment of new clients to any or all providers. All contracts are awarded on the basis of available funding. In the event of a change in available funding, provider contracts may be impacted.

3. Termination of Contracts

Contracts may be terminated by the AGENCY at any time during the term of the agreement, for issues arising from a conflict of interest, accepting a gratuity, suspension or debarment, or for convenience. If early termination occurs for any reason, any funds advanced to the Contractor shall be returned to the Area Agency within ten (10) days after the termination.

J. Procedures for Provider Appeal

Unsuccessful RFP applicants may appeal the decision not to award them a contract. The appeal's procedure is as follows:

1. The failed applicant will submit a written appeal specifically identifying the basis for the appeal.

2. The President & CEO will issue a decision on the appeal within twenty (20) calendar days from the date of the US postmark on the appeal. The written decision on the appeal is final.

K. Information on Completing the Proposal

All questions an applicant may have regarding the RFP must be submitted in writing to [FY25RFP@aaaphx.org](mailto:FY25RFP@aaaphx.org).

**SECTION V**  
**SCOPES OF WORK & SERVICE SPECIFICATIONS**

Contracted services must be provided in accordance with Arizona DES Scopes of Work and AGENCY contract terms.

To review the DES information you are responsible for as an applicant, please visit:

[https://des.az.gov/sites/default/files/SOW\\_for\\_Area\\_Agency\\_on\\_Aging.pdf?time=1709766293885](https://des.az.gov/sites/default/files/SOW_for_Area_Agency_on_Aging.pdf?time=1709766293885)