

**RFP-24-18-CONTSERV-SUBRECEIP**

**Request for Proposal 2024-SUBRECEIP  
Bexar AAA Contracted Services for FY24 – FY26**



Procurement Department  
2700 NE Loop 410, Suite 101  
San Antonio, TX 78217  
Voice (210) 362-5200  
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<b>RFP Release Date:</b>	<b>March 28, 2024 at 1:00 p.m.</b>
<b>Written Clarifications &amp; Additional Information Requests due by:</b>	<b>April 5, 2024 at 4:00 p.m.</b>
<b>Clarification Responses posted on AACOG website no later than:</b>	<b>April 15, 2024 at 5:00 p.m.</b>
<b>Response Deadline:</b>	<b>April 22, 2024 at 5:00 p.m.</b>

**RFP links:**

<http://www.aacog.com/bids.aspx>  
[http://esbd.cpa.state.tx.us/bid\\_show.cfm?bidid=](http://esbd.cpa.state.tx.us/bid_show.cfm?bidid=)

**NOTICE:** Prospective proposers who have received this document from a source other than AACOG should immediately contact AACOG and provide their name, company, and email address in order that an addendum to the RFP or other communication can be delivered. Any

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Appendix A: Service Definitions

Appendix B: Budget

RFP links: <http://www.aacog.com/bids.aspx>

[http://esbd.cpa.state.tx.us/bid\\_show.cfm?bidid=](http://esbd.cpa.state.tx.us/bid_show.cfm?bidid=)

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**PART 1.0 – SCOPE OF REQUEST**

**1.1 PURPOSE OF REQUEST FOR PROPOSAL (RFP)**

The Alamo Area Council of Governments’ (AACOG) Bexar Area Agency on Aging (BAAA) is requesting proposals to provide support services authorized under the Title III of the Older Americans Act of 1965 (OAA), and Nutrition Services Incentive Program (NSIP) and State General Revenue (SGR) as amended and in accordance with the approved Bexar County Area Plan.

**1.2 BACKGROUND INFORMATION**

**A. The Alamo Area Council of Governments**

AACOG is a voluntary association of municipal and county governments and special districts located in Bexar County and the surrounding twelve counties. Defined as a political subdivision of the State of Texas, the Alamo Area Council of Governments (AACOG) was established in 1967 under Chapter 391 of the Local Government Code as a voluntary association of local governments and organizations that serves its members through planning, information, and coordination activities. AACOG serves the Alamo Area/State Planning Region 18, which covers 13 counties and 12,582 square miles. Comprising the area planning region are Atascosa, Bandera, Bexar, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, Medina, McMullen, and Wilson counties.

**B. Purpose**

1. The purpose of this RFP is to identify the availability of sub-recipients to operate and manage priority services within the region, their service accessibility, and the delivery system(s) to be used to provide supportive services funded by the OAA of 1965, as amended, and the State of Texas. The funds will also be used to carry out Bexar AAA’s Strategic Plan.
2. AACOG reserves the right to set funding priorities for subcontracted services.

**C. Contract Goals & Objectives**

The central objectives to be fulfilled through this contract are as follows:

1. AACOG is seeking to award contracts to qualified, eligible contractors for the Aging Program services as described in this Request for Proposals (RFP) and as defined in Appendix A.
2. The type of services and amounts sought are:

Title III C 1 – Congregate Meal	\$ 2,200,000
Title III C 2 – Home Delivered Meals	\$ 1,600,000
<b>State General Revenue Funds</b>	<b>\$ 250,000</b>
<b>Grand Total</b>	<b><u>\$ 4,050,000</u></b>

**D. Implementation of Objectives**

1. The contract objectives for the BAAA contracted services proposal shall be fulfilled by the sub-recipient following approval by AACOG of the final work plan developed from the Statement of Work.

**1.3 STATEMENT OF WORK**

**A. Service Plan**

1. AACOG is designated as the AAA under contract with the Texas Health and Human Services Commission (HHSC). The authority on which this contract is based derives from the OAA, as amended, and its regulations;
2. Congress appropriates funds to implement the OAA and apportions those funds to the states. Within Texas, HHSC then allocates the apportioned funds to the AAAs for administration at the local level. HHSC awards these funds based on statistical factors such as population aged 60+ living in rural areas, and income levels of population aged 60+ in each of the Planning Service Areas (PSAs). The PSA for Bexar AAA is Bexar County.
3. Bexar AAA then allocates funds to prioritized programs within the PSA based upon an Area Plan approved by HHSC. The Area Plan identifies prioritized older adults services. Bexar AAA finally

awards a significant portion of funding for those priority services to qualified sub-recipients who then furnish services on behalf of Bexar AAA. Funding priorities identified in the Bexar AAA Area Plan for fiscal years 2024 – 2026 are as follows Congregate Meals and Home Delivered Meals. We have provided a list of service definitions for these services at Appendix A. A procedural manual will be provided upon contract award.

4. The OAA requires each AAA and its sub-recipients to implement effective outreach strategies that will identify individuals eligible for assistance with special emphasis on Older Individuals:
  - a) Who are low income.
  - b) Who are members of a minority group.
  - c) With greatest economic need.
  - d) With greatest social need.
  - e) With severe disabilities.
  - f) With limited English speaking ability.
  - g) With Alzheimer’s disease or related disorders and with neurological or organic brain dysfunction.
  - h) Who are residing in rural areas.
  - i) At-risk of institutional placement.

#### 1.4 PLANNING SERVICE AREA

1. The Planning Service Area for this RFP is Bexar County/18-.

#### 1.5 PROJECT BUDGET

The estimated funds available for the priority projects in the categories are listed below. Proposers planned budget must reflect all operating expenses to be incurred in the performance of this proposal and the level of Federal or State funding requested to support the planned expenditures. **These funds require the proposer to provide at least a 10% cash match.**

##### 1. Federal / State Funds

a.	Title III C 1 – Congregate Meal	\$ 2,200,000
b.	Title III C 2 – Home Delivered Meals	\$ 1,600,000
c.	<b>State General Revenue Funds</b>	<b>\$ 250,000</b>
d.	<b>Grand Total</b>	<b><u>\$ 4,050,000</u></b>

2. Proposers must have sufficient financial resources to operate on a reimbursement basis. A three (3) month cash flow is recommended. The AAA must receive approval from HHSC to contract with a for-profit corporation.
3. The AAA may require the selected applicants to participate in rate negotiations and submit any price, technical, or other revisions that may result from negotiations

#### 1.6 AUTHORITY

1. HHS 45 CFR 75;
2. HHS 45 CFR 92;
3. HHS 45 CFR 1321;
4. HHS 45 CFR 91;
5. Texas Uniform Grant Management Standards (UGMS);
6. Texas Administrative Code (TAC), Title 26, Part 1, Chapter 213, Subchapter C, Division 3, Rule §213.203 Texas Local Government Code, Chapter 252
7. Texas Government Code, Chapter 2161
8. HHSC Area Agency on Aging Policies and Procedures Manual, Chapter F-1000 thru F-1800

## 1.7 PROCUREMENT STANDARD

It is the policy of AACOG to conduct procurement in a manner that provides for full and open competition. An award will be made only to an organization possessing the qualifications and demonstrated ability to perform successfully under the terms and conditions of a contract. The services solicited under this RFP are procured under the Competitive Proposal Method.

## PART 2.0 - SUBMISSION INFORMATION

### 2.1 RESPONSE DEADLINE

All proposals must be received and recorded by AACOG no later than April 22, 2024 by 5:00 p.m. Official receipt of proposals submitted will be by entry on a proposal receipt log. A receipt form will be issued upon request. Proposals may be hand-delivered prior to the stated deadline between 8:00 a.m. and 5:00 p.m. Monday through Friday or mailed to the following address:

**Alamo Area Council of Governments**  
**2700 NE Loop 410, Suite 101**  
**San Antonio, Texas 78217**  
**Attn: RFP-24-18-CONSERV-SUBRECEIP**

Proposals submitted by mail, courier or overnight mail services must be received at the above address by the deadline (regardless of postmark or date shipped). **Proposals received after the due date and time will not be accepted or considered under this procurement. No exceptions will be made to this requirement for any reason. The timely delivery of proposals is the sole responsibility of the respondent. Faxed or e-mailed proposals will not be accepted.** Modifications or amendments to a proposal must comply with the requirements and response deadline. A respondent may withdraw a proposal at any time during the procurement process by submitting a written request to the Procurement Manager, 2700 NE Loop 410 Suite 101, San Antonio, Texas 78217.

### 2.2 PROCUREMENT SCHEDULE

All times noted on the Procurement Schedule (Page 1) are central time. Dates posted are subject to change. Entities requesting a copy of the RFP, submitting a request for technical assistance will be notified in writing of any changes in the procurement schedule on the AACOG website.

### 2.3 WRITTEN CLARIFICATION AND ADDITIONAL INFORMATION

- A. AACOG will accept questions submitted via electronic mail, not later than 4:00 pm April 05, 2024.
- B. Clarification Responses will be posted to the AACOG website not later than 5:00 pm April 15, 2024

No other representative of AACOG is allowed to accept or respond to questions related to this solicitation other than:

Debbie Ugarte, Procurement Manager  
Alamo Area Council of Governments  
2700 NE Loop 410, Suite 101  
San Antonio, TX 78217  
[procurement@aacog.com](mailto:procurement@aacog.com)

- A. During the period between the date AACOG issues this RFP and the selection of the vendor who is awarded a contract by AACOG, if any, Respondents shall restrict all contact with AACOG and direct all questions regarding this RFP, including questions regarding terms and conditions, only to Debbie Ugarte, Procurement Manager identified above. Do not contact members of the Board of Directors, other employees of AACOG or any of AACOG's agents or administrators. Contact with any of these prohibited individuals after issuance of this RFP and before selection is made, may result in disqualification of the Respondent. The communications

prohibition shall terminate when the contract is recommended by the administration, considered by the Board of Directors at a duly noted public meeting, and a contract has been awarded. In the event the Board of Directors refers the recommendation back to staff for reconsideration, the communications prohibition shall be re-imposed. Additionally, during the time period between the award by the Board of Directors and the execution of the contract, Respondents shall not engage in any prohibited communications as described in this section.

- B. Prohibited communications includes direct contact, discussion, or promotion of any Respondent's proposal with any member of AACOG's Board of Directors or employees except for communications with AACOG's designated representative as set forth in this RFP and only in the course of inquiries, briefings, interviews, or presentations. This prohibition is intended to create a level playing field for all potential Respondents, assure that decisions are made in public, and to protect the integrity of the RFP process. Except as provided in the above stated exceptions, the following communications regarding a particular invitation for bids, requests for proposal, requests for qualifications, or other solicitation are prohibited:
1. Communications between a potential vendor, service provider, bidder, respondent, lobbyist or consultant and any member of AACOG's Board of Directors;
  2. Communications between any director and any member of a selection or evaluation committee; and
  3. Communications between any director and administrator or employee.

The communications prohibition shall not apply to the following:

1. Communications with AACOG's purchasing agent specifically named and authorized to conduct and receive such communications under this RFP or upon the request of AACOG, with AACOG's general counsel; and
2. Presentations made to the Board of Directors during any duly noticed public meeting.

Nothing contained herein shall prohibit any person or entity from publicly addressing AACOG's Board of Directors during any duly noted public meeting, in accordance with applicable Board policies, on a matter other than this RFP or in connection with a presentation requested by AACOG's representatives.

## **2.4 AVAILABILITY OF REQUEST FOR PROPOSALS**

The RFP will be posted as noted on Page 1, RFP Links, or at the request of the proposer, by contacting procurement staff at the above fax or e-mail beginning March 22, 2024 after 1:00 p.m. The RFP is also available at the above address from 8:00 a.m. – 5:00 p.m., Monday through Friday (except for holidays). Any interested party that receives this RFP by means other than directly from AACOG is responsible for notifying AACOG that it has received an RFP package so that when an addendum to this RFP is issued the information can be provided to all interested parties.

## **2.5 PROPRIETARY INFORMATION AND THE TEXAS PUBLIC INFORMATION ACT**

- A. Because contracts are awarded by a governmental entity, all responses submitted are subject to release as public information after contracts are executed. If a Respondent believes that its response, or parts of its response, may be exempted from disclosure, the Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s). Any information that is unmarked will be considered public information and released, if requested under the Public Information Act.
- B. The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). AACOG must provide the OAG sufficient information to render an opinion and therefore, vague and general claims to confidentiality by the Respondent are not acceptable. AACOG must comply with the opinions of the OAG. AACOG assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information. After completion of award,

these documents will be available for public inspection.

## **PART 3.0—GENERAL INFORMATION & ADMINISTRATIVE REQUIREMENTS**

### **3.1 ELIGIBLE PROVIDERS**

- A. AACOG expects to receive proposals from established and knowledgeable entities with demonstrable expertise in the tasks required. The proposer selected for contract will become a sub-recipient and responsible for eligibility determination and service delivery as outlined in the SOW.
- B. It is the policy of AACOG to encourage participation by small and historically underutilized businesses (HUBs), as defined in Government Code, Chapter 2161, as contractors to AACOG. It is the goal of AACOG to include HUBs in at least ten percent (10%) of the total value of contracts awarded annually.
- C. To be eligible for consideration:
  1. A criminal background check will be required of every employee of each proposing organization that may potentially be involved in the cost of this RFP;
  2. I-9 clearance will be required of every employee of each proposing organization to verify eligibility to work in the United States.
  3. Contractor will be required to provide proof of coverage prior to contract execution:
    - a. General liability insurance coverage to cover bodily injury and property damage to a third party \$1,000,000 per occurrence; \$2,000,000 aggregate
    - b. Professional liability coverage related to errors and omissions at the minimum coverage level of \$250,000.
    - c. Workers Compensation & Employer Liability coverage at the statutory limit of \$500,000 per accident
    - d. Automobile liability coverage at the statutory limit of \$500,000 per occurrence.
- D. AACOG is prohibited from contracting with any entity debarred, suspended, or otherwise excluded from or ineligible for participation. Accordingly, a contract requires Contractors to certify that they are in compliance with the Federal regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98-510, Participant's Responsibilities. The Contractor must certify that to the best of its knowledge and belief that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by a Federal department or agency.
- E. Proposers must be knowledgeable of U.S. Health and Human Services (HHS) regulations and the statutes, regulations, rules and policies of the Texas Health and Human Services Commission (HHSC) and all services outlined within this RFP and must accurately apply them in developing

the RFP response.

- F. Respondents must possess the knowledge, experience and expertise, professional judgment and capacity within their organization to perform the services and activities requested under this RFP, and meet high standards for public service and fiduciary responsibility.

### **3.2 CONTRACT INFORMATION**

#### **A. TYPE OF CONTRACT**

This Request for Proposals may result, assuming a contractor is selected and an award made, in a unit rate, performance-based or cost-reimbursement based agreement.

#### **B. CONTRACT PERIOD**

It is the intent of AACOG to execute a contract for the delivery of services identified for an initial period of beginning on or about October 1, 2024 and ending September 30, 2025, with annual budget and negotiated of units of service, unit rates and other additional performance measures. Any contract extension shall be at the sole discretion of AACOG and shall be based upon AACOG's evaluation of Contractor's performance and compliance under the terms and conditions of the contract. AACOG reserves the right to terminate a contract at any time based on Contractor performance or noncompliance.

#### **C. ADDITIONAL FUNDING**

AACOG reserves the right to expand the contract to include additional service units identified in the



proposal response that AACOG deems beneficial to the area.

D. REASSIGNMENT

In the event a Contractor fails to perform as required, AACOG reserves the right to terminate the contract early and assign the contract in whole or in part to a comparably ranked proposer/proposal obtained through this procurement, subject to successful contract negotiations.

### 3.3 GOVERNING PROVISIONS AND LIMITATIONS

Violation of any of the following provisions may cause a proposal to be disqualified and rejected from consideration.

- A. The proposal, if accepted, will become the basis for the contract scope of work.
- B. Respondents must submit a comprehensive proposal for all services solicited. Any proposal that is not comprehensive will be deemed non-responsive.
- C. The only purpose of this RFP is to ensure uniform information in the solicitation of proposals for the procurement of identified services. This RFP is not to be construed as a purchase agreement, contract or as a commitment of any kind; nor does it commit AACOG to pay for costs incurred prior to the execution of a formal contract unless such costs are specifically authorized in writing by AACOG.
- D. AACOG reserves the right to accept or reject any or all proposals received, to cancel or reissue this RFP in part, or its entirety.
- E. AACOG reserves the right to award a contract(s) for any services solicited in this RFP in any quantity AACOG determines is in its best interests.
- F. AACOG reserves the right to extend, shorten, increase or decrease any contract awarded as a result of this RFP.
- G. AACOG reserves the right to request additional information, clarification of or explanation for any aspect of a response to this RFP.
- H. AACOG reserves the right to waive any minor defect in the procurement process or to correct any error(s) and/or make changes to this solicitation it deems necessary. AACOG will provide notifications of any changes in this RFP to all interested parties having requested or received a copy of this RFP.
- I. AACOG reserves the right to negotiate the final terms of any and all contracts or agreements with selected proposers and any such terms negotiated as a result of this RFP may be renegotiated and/or amended in order to successfully meet the needs of the regional area.
- J. AACOG reserves the right to contact any individual, agency, employer or granting agencies listed in a proposal, contact others who may have experience and/or knowledge of the respondent's relevant performance and/or qualifications; and to request additional information from any and all respondents.
- K. AACOG reserves the right to conduct on-site reviews of records, systems, procedures, including credit and criminal background checks of any entity selected for funding under this RFP. This may occur either before or after the award of a contract or agreement. Any misrepresentation of the proposer's ability to perform as stated in the RFP response may result in the cancellation of any contract or agreement awarded.
- L. AACOG reserves the right to withdraw or reduce the amount of an award or to cancel any contract or agreement resulting from this RFP if adequate funding is not received by AACOG from HHSC, or other funding sources or due to legislative changes.
- M. Respondents shall not, under penalty of law, offer or provide any gratuities, favors or anything of monetary value to any officer, board member, employee, proposal evaluator, or agent of AACOG or elected official for purposes of having an influencing effect on this procurement.
- N. Respondents shall not attempt in any manner to advocate for, lobby or otherwise attempt to influence any officer, board member, employee, proposal evaluator, or agent of AACOG or elected official for purposes of having an influencing effect on this procurement.
- O. No officer, board member, employee, proposal evaluator, or agent of AACOG shall participate in the selection, award or administration of a contract if a conflict of interest, or potential conflict, is involved.
- P. Respondents shall not engage in any activity that will restrict or eliminate competition. Violation of this provision will cause a respondent's proposal to be disqualified and rejected. This does not preclude joint ventures or subcontracts.

- Q. The contents of a successful proposal will become a contractual obligation if selected for the award of a contract. Failure of a respondent to accept this obligation may result in cancellation of an award. No plea of error or mistake shall be available to successful proposer as a basis for release from proposed services at the stated price/cost. Any damages accruing to AACOG as a result of a successful proposer's failure to contract with AACOG may be recovered from the proposer.
- R. A contract with a selected proposer may be withheld, at the sole discretion of AACOG, if issues of contract or questions of non-compliance, questioned/disallowed costs, audit/monitoring findings or legal issues exist, until such issues are satisfactorily resolved. AACOG may withdraw the award of a contract if the resolution is not satisfactory to AACOG.
- S. AACOG is exempt by law from paying State Sales Tax and Federal Excise Tax.

### **3.4 ADMINISTRATIVE REQUIREMENT AND LIMITATIONS**

- A. Contractor will be required to procure all insurances required by this RFP and to list AACOG and HHSC as an additional insured on each policy prior to the commencement of any work pursuant to a contract executed as a result of this RFP. Liability coverage and deductible must be acceptable to AACOG.
- B. Respondents must be able to demonstrate the necessary administrative and fiscal capability necessary to successfully provide required services and to meet the financial accountability requirements of federal grants.
- C. Contractors must agree to comply with HHSC and AACOG rules, policies, directives, procedures, and plans and unilateral contract modifications.
- D. Contractor must earn and expend program income in accordance with UGMS Subpart C 25, 45 CFR Part &5, 45 CFS 1321.73, 26 TAC 213.153(j) and all applicable HHSC rules. Contractor must use all program income and participant contributions collected under the approved Area Plan to promote eligible program outcomes. All program income and participants contributions collected and expended must be documented and managed according to HHSC rules.
- E. AACOG Contractors are subject to compliance monitoring. At any time during normal business hours, and as often as deemed necessary, AACOG, HHSC, U.S. Health & Human Services (HHS), or any of their duly authorized representatives shall have complete access to any books, invoices, payrolls, time sheets, or any other records or papers which are related to a contract resulting from this RFP for the purpose of verifying contractual, program and financial compliance with all applicable laws, rules, regulations and policies.
- F. Contractor must provide reports upon demand as may be requested or required by AACOG.
- G. Private for-profit corporations submitting a proposal must include a statement signed by an authorized representative of the corporation authorizing submission of a proposal.
- H. AACOG shall require the Contractor to remove any employee from the contract who is alleged to have committed an offense subsequent to the background check performed.
- I. Respondents must possess the knowledge, experience and expertise, professional judgment and capacity within their organization to perform the services and activities requested under this RFP.

## **PART 4.0 – PROPOSAL REVIEW AND SELECTION PROCESS**

### **4.1 EVALUATION PROCESS**

The evaluation process will consist of:

- A. An initial review of responsiveness and compliance with the criteria specified in the RFP by AACOG staff.
- B. All responsive proposals will be evaluated and scored by an independent team of reviewers. Proposals will be evaluated on specific criteria outlined in Section 4.2 by reviewers using a standardized scoring matrix.
- C. Presentation of scoring and recommendations of evaluation committee to a designated committee.
- D. Finalists identified may be asked to present their proposals at the discretion of AACOG.
- E. Contract award based on recommendation of the subcommittee to begin contract negotiations.

## 4.2 PROPOSAL EVALUATION CRITERIA

Proposers must achieve an overall score of at least 70 points to be considered for the award of funds. The review and evaluation of proposals shall be based upon the following criteria:

- |  |                          |
|--|--------------------------|
| <b>A. Agency Capability</b>  | <b>35 points</b>         |
| Demonstrated qualifications and time commitment of the personnel assigned to serve the targeted population; maintain necessary fiscal controls and provide performance accountability in a timely and accurate manner. |                          |
| <b>B. Demonstrated Performance</b>   | <b>20 points</b>         |
| Proposer has previous contractual experience with governmental entities or other organizations in administering aging programs and providing the array of required services.   |                          |
| <b>C. Service Delivery Plan</b>  | <b>25 points</b>         |
| Describes plan design, Nutrition Services, Older Americans Act Assurances and outreach to targeted populations.  |                          |
| <b>D. Budget</b>   | <b>20 points</b>         |
| Proposed budgets will be evaluated on overall reasonableness, efficient use of funds, and the cost effectiveness of funding requested for required services.   |                          |
| <b>TOTAL POSSIBLE POINTS</b>   | <b><u>100 points</u></b> |

## 4.3 PROPOSER'S ACCEPTANCE OF EVALUATION METHODOLOGY

By submitting a proposal, Proposer acknowledges:

- A. Proposer's acceptance of the proposal evaluation process
- B. The criteria for selection
- C. Proposer's recognition that certain subjective judgments may be generated during evaluation

## 4.4 PROCUREMENT DISPUTE RESOLUTION

### Appeal and Debriefing Process

#### 1. Appeal Process

- a. Respondents not selected for funding may appeal only with respect to any fault or violation of law or regulation regarding the procurement process. Appeals must be filed within **ten calendar days** of receipt of Board notification of final action. Final Board action shall be considered to be the Board meeting at which final selection of the contractor is made. Appeals shall be directed to:

Clifford Herberg, Executive Director  
Alamo Area Council of Governments  
2700 NE Loop 410, Suite 101  
San Antonio, TX 78217
- b. The appeal must indicate the Board action appealed and the violation, which forms the basis for the appeal, and shall be signed by the appellant organization's authorized representative. Fax and e-mail transmittals will not be accepted. The filing of the appeal must be within the time frame identified. There is no relief accorded appellants for not filing within the published deadlines. Hearings shall be conducted in accordance with existing Agency procedures.
- c. Respondents must provide a detailed statement of legal and factual grounds including copies of relevant documents; and the form of relief requested.
- d. Respondents may NOT appeal the scoring and ranking of proposals, unless substantiated by material or relevant facts;
- e. Respondents may NOT appeal solely on the belief that their proposal is superior to the one selected for award.

- f. Respondents understand that review and action shall be considered final, with no further formalities considered.

## **2. Request for Debriefing**

- a. Respondents not selected by this procurement process, and have elected not to file an appeal, may submit within 10 days of the receipt of Board notification of the procurement decision, a Request for Debriefing to obtain information on the procurement process and how their proposal or offer was received and ranked. The Board shall acknowledge receipt of the Request for Debriefing in writing within 10 days of receipt, along with the date and time of the scheduled Debriefing. The Debriefing shall be scheduled as soon as possible and no later than 10 days from the receipt of the Request for Debriefing. A debriefing is offered as a courtesy to any bidder who is not selected for funding. The purpose of the debriefing is to promote the exchange of information, explain the proposal evaluation system, and help unsuccessful bidders understand why they were not selected.

## **PART 5.0 – PROPOSAL RESPONSE REQUIREMENTS**

### **5.1 PROPOSAL FORMAT AND NUMBER OF PROPOSALS**

#### **A. NUMBER OF COPIES**

Respondents must submit one (1) unbound complete original, to include all executed certifications and authorized signatures, plus six (6), proposal copies, for a total of seven (7) exact proposals. Finally, one (1) electronic copy of your proposal on compact disc (CD), or flash drive is required. Any submission lacking the required number of proposals will be ruled non-responsive and will not be considered under this procurement. Any differences between the original and the copies are at the liability of the respondent.

#### **B. PROPOSAL FORMAT**

1. Proposals must be typed, single-spaced, and submitted on 8 ½ x 11-inch plain white paper/
2. Please do not use less than a 10-point font.
3. Each page of the proposal, with the exception of the coversheet, must be sequentially numbered, including attachments.
4. Proposals must contain all required elements in the order prescribed.
5. Proposals that do not conform to this requirement may be considered non-responsive and excluded from consideration under this procurement.

### **5.2 PROPOSAL VALIDITY PERIOD**

Each proposal will remain valid for AACOG's acceptance for a minimum of one hundred twenty (120) days after the submittal deadline, to allow for evaluation, selection and Board action.

### **5.3 PAGE LIMITATION**

Proposers are asked to keep responses brief, concise and to the point.

### **5.4 ORDER OF PROPOSAL CONTENTS**

Proposals must follow the format below. All items must be clearly labeled and in the exact order shown below. Compile the proposal in the following order:

1. Title Page
2. Table of Contents
3. Executive Summary
4. Proposal Narrative
5. Budget – Appendix B
6. Certification Sheet
7. Acknowledgement Form
8. Conflict of Interest Questionnaire
9. Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion
10. Non-Discrimination Certification

11. Certification Regarding Lobbying
12. Request to be added to AACOG Bidder's/Vendor List

## **PART 6.0 – PROPOSAL RESPONSE FORMS**

### **6.1 TITLE PAGE**

Each proposal must be accompanied by a complete proposal title page. Respondents must designate a contact person responsible for all communications concerning the proposal and notification of award. Respondents must also designate a person with documented signatory authority and for contract negotiations.

### **6.2 TABLE OF CONTENTS**

Each proposal must have a Table of Contents that lists each item of the proposal, including attachments, with corresponding page numbers. Clearly identify the material by section and page number.

### **6.3 EXECUTIVE SUMMARY**

Provide a brief summary highlighting your organization's history; qualifications and experience; overall approach to delivering the services solicited in this RFP; and any unique or innovative aspects of your proposal. Briefly state the proposer's understanding of the service to be provided and make a positive commitment to perform the work in a timely manner.

### **6.4 PROPOSAL NARRATIVE**

#### **A. Organizational Capacity**

**35 points**

1. Business Organization: State full name and address of your organization and identify parent company if you are a subsidiary. Specify the branch office or other subordinate element which will perform, or assist in performing, work herein. Indicate whether you operate as a partnership, corporation, or individual. Include the State in which incorporated or licensed to operate.
2. System Concept and Solution: Define in detail your understanding of the requirements presented in the Scope of Work of this request for proposal and your system solution. Provide all details as required in the Scope of Work and any additional information you deem necessary to evaluate your knowledge of HHS regulations, target populations and administering aging programs.
3. Project Management Structure: Provide a general explanation and chart which specifies project leadership and reporting responsibilities; and who will interface with the AACOG project management and team personnel. Provide a detailed description of fiscal controls, reporting capabilities and performance accountability protocol. If use of subcontractors is proposed, identify their placement in the primary management structure, and provide internal management description for each subcontractor.
4. Personnel: Include names and qualifications of all professional personnel who will be assigned to this project. State the primary work task assigned to each person and the percentage of time each person will devote to this work. Identify key persons by name and title. Provide all resumes.

#### **B. Demonstrated Performance**

**20 points**

1. Prior Experience: Describe only relevant corporate experience and individual experience for personnel who will be actively engaged in the project. Do not include corporate experience unless personnel assigned to this project actively participated. Do not include experience prior to 2011. Supply the project title, year, and reference name, title, present address, and phone number of principal person for whom prior projects were accomplished

#### **C. Service Delivery Plan**

**25 points**

1. Plan Design
  - a. Specify services to be provided and fully describe the specific geographic areas that are

- proposed to be served, identifying any service delivery limitations. Attach maps highlighting the facilities utilized and the areas to be served by each facility.
- b. Fully describe how services are to be provided. Identify services days, hours of operation, locations of service sites, administrative offices, staffing, and service delivery methods. If other services besides those proposed operate at those sites, describe those services and how they impact on the services for which the proposal is submitted. If services are to be offered at locations where more than one organization operates, specify the other organizations, their public/private status, and the nature of the relationship between the organizations (e.g., a contract or MOU) and how that relationship affects the operations of the proposer and the activities for which funding is sought from AACOG/BAAA.
  - c. As a sub-recipient, describe your project's activities resulting in efficiencies or cost savings to the service (e.g. volunteers, bulk purchasing, central kitchens). Describe any other existing efforts being coordinated to enhance service capabilities and/or quality.
  - d. As a sub-recipient, provide a written policy statement and staff procedures utilized to inform participants of the opportunity for voluntary contributions, describing the income ranges of eligible older persons to be served by each facility or program, and the method of voluntary contribution collection, counting, and safeguards.
  - e. Performance measurement is used to objectively evaluate the accomplishments of a program or service. The goal is to measure the quality of services and the service satisfaction of participants in programs designed for designated beneficiaries in compliance with the OAA. Describe how your project will measure the quality of services and the service satisfaction of participants. Attaching the evaluation forms and reports to be used.
  - f. As a sub-recipient, specify how your project will ensure compliance with applicable provisions of federal, state, and local fire, health, sanitation and safety laws and regulations related to the provision of proposed services. Attach policies and procedures that will guide these policies. Include ADA Compliance Reviews, Disability Accommodations and all compliant process procedures.
  - g. As a sub-recipient, specify your project's processes to determine client eligibility and initiate service. State if your project maintains a wait list and how your project prioritizes clients if wait lists are implemented. Provide detail regarding the project's reassessment process and timelines for contacting, accessing and reassessing beneficiaries.
  - h. As a sub-recipient, describe training provided to the projects staff and/or volunteers.
  - i. As a sub-recipient, specify how your project will assure the AAA that services(s) is/are available and accessible to persons outlined in the Americans with Disabilities Act. Describe in detail how participants would access services who are a) mobility impaired; b) visually impaired; c) hearing impaired.
  - j. As a sub-recipient, describe how services will be coordinated with other service providers within the area (identify existing arrangements).
  - k. As a sub-recipient, specify how our project will facilitate coordination with the AAA Access and Assistance component with respect to the delivery of community based services i.e. case management, caregiver initiative, benefits counseling, ombudsman, and information, referral, and assistance.
  - l. As a sub-recipient, describe your agency's policy and procedures for assuring the AAA that reported units are accurate. Describe your agency's lowest form of support documentation i.e. consumer meal logs/drivers logs.
  - m. As a sub-recipient, describe your agency's policy and procedures that ensure information about an older person is not disclosed in a form that identifies the person without the informed consent of the person or his/her legal representative.

## 2. Nutrition Services (If Applicable)

- a. As a sub-recipient, describe the process of menu development with assurance of compliance with 26 TAC 213.203(e). Identify your dietician, provide dietician license number, and describe frequency of menu cycle. If applicable, describe other duties performed by the dietician.
- b. As a sub-recipient, describe how your project will reasonably accommodate older persons with particular dietary needs arising from health requirements, religious requirements, or ethnic backgrounds. Refer to 26 TAC 213.203 (e)
- c. As a sub-recipient, describe how your project will assure compliance with 26 TAC 213.203 (r) related meal availability 250 days per year and during weather-related emergencies, fire, and other disasters.
- d. As a sub-recipient, describe your project's efforts for development of a plan for nutrition education in compliance with 26 TAC 213.203. Describe types of materials used, sources of information presented, and presenter of the required nutrition education plan.
- e. As a sub-recipient, describe your project's processes in the event of a disaster or unforeseen event. Describe the process to provide meals in advance, describing the number of clients impacted and the process to notify the AAA.

3. Older Americans Act Assurances (Required)

- A. The Older Americans Act of 1965, as amended, requires assurances that specific objectives will be met by the AAA and its sub-recipients. Please provide a narrative response for how your organization plans to meet each of the following OAA objectives.
  - a. Provide assurances that the agency will set specific objectives for providing services to older individuals with greatest economic need and older individuals with greatest social need include specific objectives for providing service to low-income minority individuals and older individuals residing in rural areas. The assurance should be in written narrative form and specific to low-income minority and older individuals residing in rural areas individuals rather than a statement covering both criteria, even if the characteristics of the clients are both low-income minority and reside in rural areas.
  - b. Sub-recipients shall provide outreach activities to ensure participation of targeted elderly persons and shall provide training for staff and volunteers to ensure effective and efficient service delivery to the elderly. Specify how your project will identify individuals eligible for services with particular attention to those individual who are the following:
    - I. Low income and in greatest economic need;
    - II. Members of a minority group;
    - III. In greatest social need;
    - IV. Frail with functional impairments and server disabilities;
    - V. Limited in English speaking ability;
    - VI. Victims of Alzheimer's disease or related disorders;
    - VII. At-risk of institutional placement; and
    - VIII. Rural.
- B. Specifically address each target group. Specify what outreach efforts will be implemented by your agency to inform these individuals regarding the availability of service.
  - a. Identify the number of low-income minority older individuals and older individuals residing in rural areas who reside in the proposed service area.
  - b. Specify how your project will ensure that each activity undertaken by the agency, including planning, advocacy and systems development will include a focus on the needs of low-income minority, older individuals and older individuals residing in rural areas.
  - c. Specify how your project will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, with agencies that develop or provide services for individuals with disabilities.

- d. Specify how your project will take into account in connection with matters of general policy arising in the development and administration of the service plan, the views of recipients of services under such plan.
- e. Specify how your project will serve as the advocate and focal point for older individuals within the community by (in cooperation with agencies, organizations, and individuals participating in activities under the service plan) monitoring, evaluating, and commenting upon all policies, programs, hearings, levies, and community actions which will affect older individuals.
- f. Specify how your project will respond to grievances from older individuals who are dissatisfied with or denied services under the OAA program. Describe the grievance procedure.

## **6.5 BUDGET**

**20 points**

Information described in this section is required from each proposer to determine a cost per deliverable. Your method of costing may not contain all elements identified below, but must be described in detail.

1. The budget should include separate line items as noted in Appendix B.
2. Provide federally audited rates, if applicable
3. Agency that approved the rate
4. Date the rate was approved
5. Personnel. Itemize the following for each category of personnel with separate hourly rates:
6. Manager, senior consultant, analyst, subcontractor, etc.
7. Estimated hours for each category of personnel
8. Rate applied for each category of personnel
9. Total personnel cost
10. Itemized cost of supplies and materials
11. Other itemized direct costs
12. If applicable, general, and administrative burden. Indicate base used, percentage, and total cost relative to this procurement.
13. Travel expenses.
14. Printing

### **6.1 TITLE PAGE**

### **6.2 TABLE OF CONTENTS**

### **6.3 EXECUTIVE SUMMARY**

### **6.4 Budget Form – Appendix B**

### **6.5 PROPOSAL NARRATIVE**

### **6.6 CERTIFICATION SHEET**

### **6.7 ACKNOWLEDGEMENT FORM**

### **6.8 CONFLICT OF INTEREST QUESTIONNAIRE, if a conflict exists. You may review the Agency's current Board of Directors at <http://www.aacog.com/AboutAACOG/Board/default.asp>**

### **6.9 CERTIFICATION REGARDING DEBARMENT**

### **6.10 NON-DISCRIMINATION CERTIFICATION**

### **6.11 CERTIFICATION REGARDING LOBBYING**

### **6.12 REQUEST TO BE ADDED TO BIDDER'S/VENDOR'S LIST**





**PROPOSAL TITLE PAGE**  
**Bexar AAA Contracted Services for FY24 – FY26**

<b>Legal Name of Proposing Entity</b>	
<b>Name of Owner/Director of Entity</b>	
<b>Title</b>	
<b>Mailing Address</b>	
<b>Physical Address (If different than mailing)</b>	
<b>Telephone Number</b>	
<b>Fax Number</b>	
<b>E-mail Address</b>	
<b>Contract Signatory Authority &amp; Title</b>	
<b>Federal Tax ID Number</b>	
<b>Historically Under-Utilized Business? If “yes”, attach copy of current certification.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Legal/Tax Status of Organization</b>	<input type="checkbox"/> Corporation <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Other (Specify)

## TABLE OF CONTENTS

## **EXECUTIVE SUMMARY**

**PROPOSAL NARRATIVE**

## CERTIFICATION SHEET

All specifications and terms and conditions of the RFP have been read.

Our Company accepts the specifications and conditions unless otherwise accepted in writing to the Executive Director, Alamo Area Council of Governments (AACOG).

Company Name:			
Mailing Address:			
City:	State	Zip Code	
Phone:		Fax:	
Web Site:			
Email:			

### Name of Representative authorized to sign for bidder:

(Print name)	(Signature)

(a) Does your "residence state" require bidders whose principal place of business is in Texas to underbid bidders whose residence state is the same as yours by a prescribed amount or percentage to receive a comparable contract? "Residence State" is defined as the state in which the principal place of business is located. YES  NO

(b) What is that amount or percentage?

I certify that the above information is correct:

Name	
Position	
Signature	
Date	

## ACKNOWLEDGEMENT FORM

Having carefully examined the terms and conditions and specifications within this RFP document, the undersigned Proposer's Agent hereby proposes and agrees to furnish the proposed product(s)/service(s) in strict compliance with the specifications as quoted.

**The Proposer affirms that, to the best of his knowledge, the response has been arrived at independently and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give them an unfair advantage over other bidders in the award of this RFP.**

**The Proposer affirms that he/she has not participated in any act of favoritism, gratuity, or inside dealings with any member of the staff of AACOG or its Board of Directors.**

Company Name:
President/Designee:
Position:
Signature:
Date:

**CONFLICT OF INTEREST QUESTIONNAIRE****FORM CIQ****For vendor or other person doing business with local governmental entity****This questionnaire reflects changes made to the law by H.B. 1491, 80<sup>th</sup> Leg., Regular Session.****OFFICE USE ONLY**

This questionnaire is being filed in accordance with chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001 (1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

Date Received

By law this questionnaire must be filed with the records administrator of the local government entity not later than the 7<sup>th</sup> business day after the date the person becomes aware of facts that require the statement to be filed. *See* Section 176.006, Local Government Code.

A person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

1. **Name of person who has a business relationship with local governmental entity.**

2.  **Check this box if you are filing an update to a previously filed questionnaire.**

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7<sup>th</sup> business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3. **Name of local government office with whom filer has employment or business relationship.**

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001 (1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes  No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not from the local government entity?

Yes  No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes  No

D. Describe each employment or business relationship with the local government office named in this section.

4.

\_\_\_\_\_  
Signature of person doing business with governmental entity

\_\_\_\_\_  
Date

## CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION FOR CONTRACTS AND GRANTS

NAME OF INDIVIDUAL, AGENCY, BUSINESS OR ORGANIZATION	Doing business as (DBA), if applicable:	
ADDRESS	Applicable Procurement or Solicitation #, if any:	Federal Employer Tax Identification #:

**READ CAREFULLY BEFORE SIGNING THIS CERTIFICATION. Federal regulations require contractors, bidders, and subgrantees to sign and abide by the terms of this certification, without modification, in order to participate in certain transactions directly or indirectly involving federal funds.**

1. By signing and submitting this certification, the prospective vendor/grantee is attesting/acknowledging the representations set out below.
2. This certification is a material representation of fact upon which the Alamo Area Council of Governments (AACOG) will rely on when this transaction is entered into. If it is later determined that the prospective vendor/grantee knowingly rendered an erroneous certification, in addition to other remedies available to Federal or State departments or funding agency(s), AACOG may pursue on its own available remedies, including contract termination, suspension and debarment.
3. **The prospective vendor/grantee shall provide immediate written notice to AACOG, Executive Director, 2700 NE Loop 410, Suite 101, San Antonio, TX 78217, if at any time it learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.**
4. The terms “covered contract”, “debarred”, “suspended”, “ineligible”, “participant”, “person”, “principal”, “proposal”, and “voluntarily excluded”, as used in this certification, have meanings based upon materials in the Definitions and Coverage sections of federal rules implementing Executive Order 12549. You may contact the person to which this proposal or contract is submitted for assistance in obtaining a copy of this regulation.
5. The prospective vendor/grantee agrees, by submitting this certification, that should the proposed contract/grant be entered into, it shall not knowingly enter into any lower-tier-covered transaction or sub-contract with a person or entity that is proposed for debarment, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this transaction, unless pre-authorized by the appropriate federal or state department or agency, or by AACOG.

**Do you have or do you anticipate having sub-vendors/sub-grantees under this proposed agreement?**

Yes     No

6. The prospective vendor/grantee further agrees by submitting this certification, that it will include this certification titled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Contracts and Grants,” without modification, in all lower-tier covered transactions and sub-contracts and in all solicitations for lower-tier covered transactions and sub-contracts.
7. A vendor/grantee may rely upon a certification of a prospective participant that it is not proposed for debarment, debarred, suspended, ineligible, or voluntarily excluded from the transaction, unless it knows that the certification is erroneous. Each vendor/grantee is required to check the list of parties excluded from Federal and State Procurement and Non-procurement Programs. **AACOG checks this list for all parties to which it provides funds that are derived directly or indirectly from the Federal Government.**
8. Nothing contained in the foregoing shall be construed to require the establishment of a system of records in order to render in good faith the certification required by this certification document. Participants are not required to have knowledge and information exceeding that which is normally possessed by a prudent person in the ordinary course of business activity.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a transaction knowingly enters into a lower-tier transaction or contract with a person who is proposed for debarment, debarred, suspended, ineligible, or voluntarily excluded from participation, in addition to other remedies available to the Federal Government, AACOG or its applicable funding agency(s) may pursue available remedies, including contract termination, suspension and/or debarment.



**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION FOR CONTRACTS AND GRANTS**

Check the statement that applies to the potential vendor/grantee:

- 1. The prospective vendor/grantee certifies by submission of this certification, that neither it nor its principals:
  - (a) Is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal or State department or agency; and
  - (b) Have, within a three-year period preceding this certification, been convicted of or had a civil judgment rendered against them for fraud; committed a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract; violated Federal or State antitrust statutes; committed embezzlement, theft, forgery, bribery, falsification or inappropriate destruction of records; or received stolen property; and
  - (c) Is presently indicted for or otherwise charged by a government entity (Federal, State, or local) with the commission of any of the offenses enumerated in the preceding paragraph (b) of this certification; and
  - (d) Have, within a three-year period preceding this certification, had one or more contracts or transactions (Federal, State, or local) terminated for cause or default.
- 2. The potential vendor/grantee is unable to certify to one or more of the terms in this certification. In this instance, the potential vendor/grantee must attach a signed and dated explanation for each of the above terms, 1(a) through 1(d), to which it cannot certify.

NAME OF POTENTIAL VENDOR/GRANTEE:	
-----------------------------------	--

<b>Signature of Authorized Representative</b>	<b>Printed/Typed Name &amp; Title of Authorized Representative</b>

Date: _____
-------------

## NON-DISCRIMINATION CERTIFICATION

The Contractor has agreed to comply with:

1. Title VI of the Civil Rights Act of 1964, as amended (42 USC §2000d), which prohibits employment discrimination based on race, color or national origin; 45 CFR 80
2. Section 504 of the Rehabilitation Act of 1973, as amended (29 USC §794) which prohibits discrimination against qualified individuals with disability in, (1) Programs and activities receiving financial assistance from HHS, 45 CFR 84, (2) Notice of exercise of authority under regarding recipients with fewer than fifteen employees, 45 CFR 84.52(d)(2), (3) Admission or treatment against substance abusers suffering from medical conditions 45 CFR 84.53, and (4) Programs or activities conducted by HHS 45 CFR 85;
3. Title IX of the Education Amendments of 1972, as amended, (20 USC §1681) prohibits discrimination on the basis of sex (gender) in Federally-Assisted Education Programs 45 CFR 86
4. The Age Discrimination in Employment Act of 1975, as amended (42 USC §6101), which prohibits discrimination on the basis of age in (1) Programs or activities receiving federal financial assistance 45 CFR 90; and (2) Programs or services receiving HHS financial assistance 45 CFR 91;
5. Title II of the Americans with Disabilities Act, 28 CFR Part 35.

NAME OF POTENTIAL VENDOR/GRANTEE:	
-----------------------------------	--

<b>Signature of Authorized Representative</b>	<b>Printed/Typed Name &amp; Title of Authorized Representative</b>

Date: _____
-------------

## Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

### Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature \_\_\_\_\_

Title \_\_\_\_\_

Organization \_\_\_\_\_

**REQUEST TO BE ADDED TO VENDOR/BIDDER LIST**

Alamo Area Council of Governments (AACOG) requires all contractors interested in conducting business with the agency to complete a “Request to be Added to Bidder/Contractor List,” packet.

AACOG/AAA has designed the Direct Purchase of Service (DPS) method to promote development of a comprehensive and coordinated delivery system to meet the needs of older individuals 60 years of age or older and their caregivers.

AACOG/AAA programs are on a cost reimbursement basis from the funding source. AACOG/AAA will bill the funding source subsequent to receipt of goods or service and invoices. Payment shall be made within 30 calendar days after receipt and staff approval of each invoice. Contractor agrees and understands that the method for receipt of payment will be in the form of an ACH deposit.

For any questions or concerns regarding the application, contact the Procurement Manager at 210.362.5228.

**RETURN THIS FORM TO:**

**Procurement Manager**  
 Area Agencies on Aging  
 Alamo Area Council of Governments  
 2700 NE Loop 410, Suite 101  
 San Antonio, TX 78217-6228

I, \_\_\_\_\_, hereby attest that I have read and understand the above terms for conducting business with the Alamo Area Council of Governments.

\_\_\_\_\_  
 Signature/Date

<b>Company Name:</b>		dba	
<b>Company Address:</b>			
<b>City, State, Zip Code:</b>			
<b>Telephone Number:</b>			
<b>Fax Number:</b>			
<b>Representative Name:</b>			
<b>Representative Phone Number &amp; Email Address:</b>			
<b>Website Address:</b>			

**Please check the service(s) for which you are applying:**

*(Attach any catalogs/brochures/samples – description of products/services required below)*

- |   |  |
|---|--|
| <input type="checkbox"/> Caregiver Training             | <input type="checkbox"/> Legal Assistance – Advice |
| <input type="checkbox"/> Caregiver Information Services | Document Preparation & Representation              |
| <input type="checkbox"/> Caregiver Support Groups       | <input type="checkbox"/> Mental Health Services    |
| <input type="checkbox"/> Respite Out of Home            | <input type="checkbox"/> Personal Assistance       |
| <input type="checkbox"/> Respite In Home                | <input type="checkbox"/> Physical Fitness          |
| <input type="checkbox"/> Chore Maintenance              | <input type="checkbox"/> Residential Repair        |
| <input type="checkbox"/> Congregate Meal                | <input type="checkbox"/> Social Reassurance Calls  |
| <input type="checkbox"/> Evidence Based Intervention    | <input type="checkbox"/> Transportation            |
| <input type="checkbox"/> Emergency Response             | <input type="checkbox"/> Other                     |
| <input type="checkbox"/> Health Maintenance             |  |
| <input type="checkbox"/> Home Delivered Meals           |  |
| <input type="checkbox"/> Homemaker Service              |  |
| <input type="checkbox"/> Income Support                 |  |

**Please assist us by completing the following:**

**1. Choose which County(ies) you are applying for:**

- |                                    |                                       |                                     |                                |                                   |                                    |
|------------------------------------|---------------------------------------|-------------------------------------|--------------------------------|-----------------------------------|------------------------------------|
| <input type="checkbox"/> Atascosa  | <input type="checkbox"/> Bandera      | <input type="checkbox"/> Bexar      | <input type="checkbox"/> Comal | <input type="checkbox"/> Frio     | <input type="checkbox"/> Gillespie |
| <input type="checkbox"/> Guadalupe | <input type="checkbox"/> Karnes       | <input type="checkbox"/> Kendall    | <input type="checkbox"/> Kerr  | <input type="checkbox"/> McMullen | <input type="checkbox"/> Medina    |
| <input type="checkbox"/> Wilson    | <input type="checkbox"/> All Counties | <input type="checkbox"/> Other_____ |                                |                                   |                                    |

**2. Type of Request:**

- New Contractor                       Update Information / Renewal

**3. Ownership:**

- |  |                                       |                                      |
|--|---------------------------------------|--------------------------------------|
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> Partnership  | <input type="checkbox"/> Corporation |
| <input type="checkbox"/> Governmental Agency | <input type="checkbox"/> Non-Profit * | <input type="checkbox"/> Other_____  |

\*Non-profit organizations are not eligible for HUB certification

**4. Tax Identification Number: \_\_\_\_\_**

**Attach completed W-9 form unless tax exempt. If tax exempt please provide verification of status. <http://www.irs.gov/pub/irs-pdf/fw9.pdf>**

**5. Have you done business with AACOG in the past?**

- Yes       No

**6. Is your business currently certified with the State of Texas' Centralized Master Bidder's list?**

<http://www.window.state.tx.us/procurement/prog/cmb1> \*\*Please return confirmation of your CMBL certification with this contractor application.

- Yes       No

**7. Is your business currently certified as a HUB with the State of Texas?**

<http://www.window.state.tx.us/procurement/prog/hub/hub-certification>

- Yes       No

**8. Is your business currently certified as a HUB outside the State of Texas?**

- Yes       No      If Yes, Name of State: \_\_\_\_\_

# Appendix A

## **Service Definitions** for Area Agencies on Aging



## Texas Department of Aging and Disability Services

Fiscal Year 2024

# SERVICES

## CONGREGATE MEAL

A hot or other appropriate meal served to an older person who is eligible in a congregate setting.

Service Name	Service Definition	Service Unit and Description	Method of Service Provision and Approval Requirement to Provide Service Directly	Reimbursement Methodology	SPR <sup>1</sup> and OAA <sup>2</sup> Reporting Requirements	QPR <sup>3</sup> and LBB <sup>4</sup> Reporting Requirements	Allowable Funds
Congregate Meal	A hot or other appropriate meal served to an older person who is eligible in a congregate setting. (AAAPPM Chapter F)	One Meal	This service may be provided by a subrecipient of the AAA or authorized by a care coordinator on behalf of an eligible person for purchase through a contractor. If requirements are met, this service may also be authorized through Data Management.  Approval Required: Yes	• Fixed Unit Rate per Meal served	SPR • "Congregate Meal" • Unduplicated – Intake • Number of unduplicated at high nutritional risk • Nutrition Risk Assessment • Units – One meal	QPR • Units • Unduplicated persons count  LBB Key Performance Measure • Number of units • Cost per unit	• Title III-C1 • Disaster Relief as approved by HHSC • State General Revenue • NSIP [Note: NSIP to be used for the purchase of food only. No units should be applied to NSIP funding.]

Nutrition Education	The provision of information to an older person to promote nutritional well-being and to delay the onset of adverse health conditions resulting from poor nutritional health or sedentary behavior. (AAAPPM Section F-1330)	One Session per person  A session is counted for each eligible person attending a nutrition education session which may be conducted in a group or one-on-one.	This service may be provided directly, provided by a subrecipient of the AAA, or authorized by a care coordinator on behalf of an eligible person for purchase through a contractor.  Approval Required: No	• Fixed Unit Rate per Session	SPR • "Nutrition Education" • Units – One session per person	QPR • Units • Estimated persons count	• Title III-C1 • Title III-C2 • State General Revenue
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## HOME DELIVERED MEAL

Hot, cold, frozen, dried, canned, fresh, or supplemental food (with a satisfactory storage life) delivered to a person who is eligible in their place of residence. (AAAPPM Chapter F; Section D-1040 and Section D-1070). A CNE is required.

Service Name	Service Definition	Service Unit and Description	Method of Service Provision and Approval Requirement to Provide Service Directly	Reimbursement Methodology	SPR <sup>1</sup> and OAA <sup>2</sup> Reporting Requirements	QPR <sup>3</sup> and LBB <sup>4</sup> Reporting Requirements	Allowable Funds
Home Delivered Meals	Hot, cold, frozen, dried, canned, fresh, or supplemental food (with a satisfactory storage life) delivered to a person who is eligible in their place of residence. (AAAPPM Chapter F; Section D-1040 and Section D-1070).  A CNE is required. (AAAPPM Section D-1040)	One Meal	This service may be provided by a subrecipient of the AAA or authorized by a care coordinator on behalf of an eligible person for purchase through a contractor. If requirements are met, this service may also be authorized through Data Management.  Approval Required: Yes	• Fixed Unit Rate per Meal served	SPR • "Home-Delivered Meal" • Number of unduplicated at high nutritional risk • Nutrition Risk Assessment • Unduplicated – Intake • Units – One meal  OAA • ADL/IADL CNE with score 20 or greater, regardless of age	QPR • Units • Unduplicated persons count  LBB Key Performance Measure • Number of Units • Cost per Unit	• Title III-C2 • Title III-E • Disaster Relief as approved by HHSC • State General Revenue • NSIP [Note: NSIP to be used for the purchase of food only. No units should be applied to NSIP funding.]

# Appendix B

## Budget Form

### **Uniform Rate Negotiation Budget Workbook**