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| **INFORMATION AND ASSISTANCE** |
| **PROGRAM STANDARDS AND WORKPLAN GUIDELINES** |
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| **Program Goal** |
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| The goal of the Information and Assistance (I&A) Program is to inform the older adult and adults with disabilities communities about local resources throughout the County of San Mateo. |
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| **Program Services Description** |
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| **Information and Assistance** means a service that: A) provides individuals with information and services available within the communities; B) links individuals to the services and opportunities that are available within the communities; and C) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site “hits” are to be counted only if information is requested and supplied and the requirement in C) are satisfied. “Maximum extent practicable” includes offering a follow-up call to all individuals who were linked to a service. Individuals can remain anonymous and may refuse a follow-up call. |
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| The Title IIIB I & A is the main entry point to services within a planning and service area. The I&A staff assess individuals' needs and link them to local services or provide referrals to programs in other communities. The I&A staff are also responsible for following-up to ensure individuals have obtained services. In addition, I&A staff work with local agencies on disaster planning and preparedness activities to address older adults' needs during local or statewide disasters. |
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| **Eligibility Specifics** |
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| **Eligible Service Population for Title III B** means individuals 60 years of age or older, with emphasis on those in greatest economic and social need with particular attention to low income minority older individuals, older individuals with Limited English Proficiency (LEP), and older individuals residing in rural areas. [OAA § 305 (a)(2)(E), 22 CCR 7125, 7127, 7130, 7135 and 7638.7]. |
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| The I&A Program is available to any older adult age sixty (60) years of age and over and any person eighteen (18) and above with a disability, family members, friends or service providers seeking information and/or assistance to help with the target population. The following reflects the requirements for Title IIIB clients, however, contractors are expected to follow similar guidelines in providing information and assistance for adults with disabilities. |
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| **Projected Annual Funding Available** |
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| **OAA Title IIIB funds for Information and Assistance Programs - $108,914** |
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| **Suggested Minimum Objectives: 5,020 contacts** |
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| **Unit of Service: One (1) contact** |
| A contact is a face-to-face or telephone interaction for up to fifteen (15) minutes. Follow-up activities will be considered a separate contact and shall be reported as such. |
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| **The Area Agency on Aging (AAA) must provide service to all Community Service Areas (CSAs) in San Mateo County. The ideal candidate for the I &A Program will serve a single or multiple CSAs.** |
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| **Program Service Requirements** |
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| **Program Requirements** means Title IIIC program requirements found in the   * Older Americans Act (OAA) 42, (USC section 3001-3058) <http://www.aoa.gov/AoA_Programs/OAA/index.aspx>; * Older Californians Act <https://www.aging.ca.gov/AboutCDA/Older_CA_Act.aspx>; * Code of Federal Regulations (CFR) (45 CFR XIII, 1321); * Title 22, California Code of Regulations (22 CCR 7000 et seq). * California Department of Aging (CDA) Program Memoranda * CDA Title III Program Manual * Occupational Safety and Health Administration (OSHA) requirements; * San Mateo County Health System policies and procedures |
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| **Title IIIB (Supportive Services)** means a variety of services including, but not limited to: personal care, homemaker, chore, adult day health care, case management, assisted transportation, transportation, legal assistance, information and assistance, outreach, and long-term care ombudsman advocacy, as defined in the National Aging Programs Information Systems (NAPIS) categories and National Ombudsman Reporting System (NORS). [OAA 321(a)] |
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| **Priority Services for Title IIIB** means those services associated with access to services (transportation, outreach, information and assistance and case management); in-home services including supportive services such as respite and visiting, for families of older individuals who are victims of Alzheimer’s disease and related disorders involving neurological and organic brain dysfunction; and legal assistance. |
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| **Individuals with Severe Disability(ies)** means a person with a severe, chronic disability attributable to mental or physical impairment, that is likely to continue indefinitely and results in substantial functional limitation in three or more major life activities. [OAA §102(a)(48)] |

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| **Resource File and Printed Directory** | | | | | | |
|  | 1. | Develop, maintain, and use an accurate, up-to-date resource file that contains information on available community resources, including information on assistive technology. The development and maintenance of this resource file(s) will be accomplished in conjunction with AAS; | | | | |
|  |  |  | | | | |
|  | 2. | Annually survey, in coordination with AAS, the social/human services available to older individuals in the community and compile and maintain a list of and information about those services including but not limited to the following: | | | | |
|  |  |  |  | | | |
|  |  | a. | Name, address and telephone number of the service provider; | | | |
|  |  | b. | Hours and days that the service provider is open for business; | | | |
|  |  | c. | Type of service(s) being provided; | | | |
|  |  | d. | Eligibility requirements for receipt of service(s); | | | |
|  |  | e. | Area served; | | | |
|  |  | f. | Application procedure to receive service(s); | | | |
|  |  | g. | Transportation available; | | | |
|  |  | h. | Wheelchair accessibility for individuals with disabilities; and | | | |
|  |  | i. | Language(s) spoken. | | | |
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|  | 3. | Have procedures to respond to interim information changes as the changes become known to the provider, in addition to the annual survey specified above; and | | | | |
|  |  |  | | | | |
|  | 4. | Assist AAS in the development of any printed or online I & A directory for public distribution. | | | | |
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| **Information and Assistance** | | | | | | |
|  | 1. | Contractor shall provide information and assistance to all older individuals in San Mateo County, with primary responsibility for the South County Community Service Area III which includes the cities of Atherton, Belmont, East Palo Alto, Menlo Park, Portola Valley, Redwood City, San Carlos, and Woodside**.** | | | | |
|  |  |  | | | | |
|  | 2 | **Information** means current facts and data including data on assistive technology ranging from a provider’s name, telephone number and address to detailed data about community service systems, agency policies and procedures for application [CCR, Title 22 § 7533 (b)(1)]. | | | | |
|  |  |  | | | | |
|  | 3. | **Assistance** means any of the following [CCR, Title 22 § 7533 (2)A-D]: | | | | |
|  |  |  |  | | | |
|  |  | a. | Assessing the needs of the inquirer; | | | |
|  |  | b. | Identifying appropriate and alternative resources to meet the inquirer’s needs; | | | |
|  |  | c. | Specifying entities known to be suppliers of the products and/or services required to meet the identified needs; and | | | |
|  |  | d. | Referring and actively participating in linking the inquirer to needed services. | | | |
|  |  |  |  | | | |
|  | 4. | The main entry point to services within a planning and service area is the Title IIIB I & A Program. I & A staff assess individuals’ needs and links them to local services or provides referrals to programs in other communities. In addition, I & A staff work with local agencies on disaster planning and preparedness activities to address the needs of older adults during local or statewide disasters. | | | | |
|  |  |  |  | | | |
|  | 5. | The I & A Program consists of information and referral services to older individuals on a variety of services such as food programs, public benefits, legal services, case management, transportation, housing and other issues as requested. In addition, the program staff are required to follow-up with consumers to ensure that when referrals are made, consumers actually receive the appropriate service. If additional referrals and/or advocacy are needed the staff will continue to work with consumers to resolve problems. | | | | |
|  |  |  |  | | | |
|  | 6. | I & A provider(s) shall intervene on behalf of the older individual to assist in establishing eligibility for a needed service provided the older individual has given permission for the I & A provider to do so. | | | | |
|  |  |  |  | | | |
|  | 7. | I&A provider(s) shall work closely with community legal and ombudsman programs established under federal law to assist older individuals in accessing advocacy services. | | | | |
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|  | 8. | I & A providers shall serve as a resource to and coordinate with other community I & A projects and with all other supportive services available in the community to enhance the accessibility and efficiency in delivery of services to older individuals. | | | | |
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| **Access** | | | | | | |
|  | 1. | When I & A services are provided in a facility the following criteria shall apply. The facility shall: | | | | |
|  |  |  |  | | | |
|  |  | a. | Be open during the hours provided for as negotiated between AAS and the contractor; | | | |
|  |  | b. | Provide individuals with the requested service(s) no later than one working day after the individual’s visit to the I & A facility; | | | |
|  |  | c. | Provide privacy when interviewing individuals to ensure confidentiality of information; | | | |
|  |  | d. | Be accessible to older adults and individuals with disabilities; | | | |
|  |  | e. | Be conveniently located near public transportation and have parking available in the vicinity; and | | | |
|  |  | f. | Be equipped with a telephone system, office, equipment and furniture. | | | |
|  |  |  |  | | | |
|  | 2. | When I & A services are provided through a telephone answering system the following criteria shall apply: | | | | |
|  |  |  |  | | | |
|  |  | a. | The I & A telephone line shall be available to callers between 8:00 a.m. – 5:00 p.m., Monday through Friday; | | | |
|  |  | b. | The I & A provider shall attempt to make contact with any caller who leaves a message no later than one working day from the date the message was left; | | | |
|  |  | c. | The contact shall be made by telephone if a return telephone number is included in the message; and | | | |
|  |  | d. | If only a return address is provided the contact shall be in the form of a written response. | | | |
|  |  |  |  | | | |
| **Follow-up** | | | | | | |
|  | 1. | Follow-up shall consist of contacting either of the following as appropriate within thirty (30) days of the referral to ascertain if the older individual’s service needs were met: | | | | |
|  |  |  |  | | | |
|  |  | a. | First an attempt shall be made to contact the older individual or person acting on behalf of the older individual; or | | | |
|  |  | b. | If contact with the person specified in (a.) cannot be made, the entity(ies) to which the older individual is referred shall be contacted. | | | |
|  |  |  |  | | | |
|  | 2. | If the follow-up is conducted with the entity(ies) to which the older individual was referred and reveals that the entity(ies) was (were) either: | | | | |
|  |  |  |  | | | |
|  |  | a. | Able to provide the needed service(s), then the provider shall record the result of the follow-up in accordance with item 3 below; or | | | |
|  |  | b. | Unable to provide the needed service(s). The provider shall: | | | |
|  |  |  | (1) | | Confirm the types of services the entity(ies) provided; | |
|  |  |  | (2) | | Ascertain the service(s) the older individual requested/needed; and | |
|  |  |  | (3) | | Attempt to provide another referral if appropriate to the older individual. | |
|  |  |  |  | |  | |
|  | 3. | Contractor shall record and take action on the follow-up by maintaining either a manual or a computer file system to record the outcome of the referral. In addition the provider shall: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Update the information in the resource directory to reflect any changes in the service(s) being provided; and | | |
|  |  | b. | | Delete the names of organizations which are no longer in operation. | | |
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| **Multilingual Services** | | | | | | |
|  | 1. | In areas where a substantial number of older adults as determined by AAS do not speak English as their primary language, the contractor shall have available a sufficient number of qualified bi/multilingual persons to ensure the provision of services. Both paid staff and volunteers and/or other interpretive services may satisfy this provision. | | | | |
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|  | 2. | I & A providers shall claim bi/multilingual capabilities or advertise as a bi/multilingual service only if either of the following conditions are met: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Bi/multilingual service staff or volunteers are available during all of the hours that I & A services are available, or | | |
|  |  | b. | | The provider advertises the hours during which bi/multilingual services are available. | | |
|  |  |  | | | | |
| **Confidentiality** | | | | | | |
|  | 1. | Contractor, contractor’s staff and/or volunteers shall not disclose any information about an older individual or information obtained from an older individual which in any way identifies that older individual without the written consent of the older individual or of that older individual’s legal representative unless the disclosure is required by court order or for program monitoring by authorized federal, State or local monitoring agencies. | | | | |
|  |  |  | | | | |
|  | 2. | Protected information is to remain in a secure, locked file and/or in the case of computerized information system, password-secured or otherwise protected to protect the confidentiality of the client’s records. | | | | |
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| **Publicity** | | | | | | |
|  | 1. | Contractor shall publicize the availability of the services to individuals within the County. The publicity at a minimum shall include: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Name of the provider and telephone number for client use; | | |
|  |  | b. | | Services offered; and | | |
|  |  | c. | | Hours and days of operation. | | |
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|  | 2. | Contractor shall be listed in the telephone directory in the geographical area it serves as follows: | | | | |
|  |  |  | |  | | |
|  |  | a. | | White Page listing – SENIORS’ INFORMATION or any other title commencing with the word SENIOR or SENIORS; and | | |
|  |  | b. | | Yellow Page listing – SENIORS’ Services and ORGANIZATIONS. | | |
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| **Staffing** | | | | | | |
|  | 1. | Contractor shall recruit management and staff who are experienced in I & A services and who demonstrate the ability to: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Communicate clearly both orally and in writing to older individuals and to organizations in the community; | | |
|  |  | b. | | Understand and assess the needs of older individuals in delivering I & A services; and | | |
|  |  | c. | | Inform older individuals of the services available and assist them in utilizing these services. | | |
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|  | 2. | Contractor may use volunteers to augment but not to replace paid staff. | | | | |
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|  | 3. | Contractor’s staff/volunteers shall: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Maintain the resource file specified and keep the information current; | | |
|  |  | b. | | Provide I & A to inquirers; | | |
|  |  | c. | | Follow-up in cases where referrals have been made; and | | |
|  |  | d. | | Collect statistical data on clientele to document the types of referral services that are in the highest demand. | | |
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|  | 4. | Management and supervisory staff are to perform the following: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Determine number of staff including paid staff and volunteers required and the hours staff shall work; | | |
|  |  | b. | | Train paid staff and volunteers; | | |
|  |  | c. | | Implement personnel policies and practices including personnel evaluations of paid staff and volunteers at least annually; and | | |
|  |  | d. | | Provide new paid staff and volunteers with an orientation in federal law and I & A principles. | | |
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| **Training** | | | | | | |
|  | 1. | Contractor shall maintain a written plan for the provision of training to paid staff and volunteers. The training plan shall include elements to both: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Familiarize both paid staff and volunteers during orientation with the OAA; and | | |
|  |  | b. | | Define the role, purposes and function of the I & A service, the governing body and the administrative structure and policies of the service. | | |
|  |  |  | |  | | |
|  | 2. | I & A staff shall have written procedures in place and should be trained at least annually on how to handle emergencies. As specified in CCR, Title 22, Division 1.8, Chapter 4, Article 2, § 7547, the training shall consist of: | | | | |
|  |  |  | |  | | |
|  |  | a. | | Familiarity with telephone numbers of fire, police and ambulance services for the geographic area served by the provider. These telephone numbers shall be posted near the telephone for easy access when an emergency arises; | | |
|  |  | b. | | Techniques to obtain vital information from older individuals and persons with disabilities who require emergency assistance; and | | |
|  |  | c. | | Making written emergency procedures and instructions available to all staff that have contact with older individuals or persons with disabilities. | | |
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| **Contributions** | | | | | | |
|  | 1. | Contractor assures that voluntary contributions shall be solicited in accordance with the following requirements: [OAA § 315(b)] | | | | |
|  |  |  | |  | | |
|  |  | a. | | Means tests shall not be used by any contractor for any Title III or Title VII services; | | |
|  |  | b. | | Services shall not be denied to any Title III or Title VII client that does not contribute toward the cost of the services received; | | |
|  |  | c. | | Methods used to solicit voluntary contributions for Title III and Title VII services shall be non-coercive; and | | |
|  |  | d. | | Each service provider will: | | |
|  |  |  | | (1) | | Provide each recipient with an opportunity to voluntarily contribute to the cost of the service; |
|  |  |  | | (2) | | Clearly inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary; |
|  |  |  | | (3) | | Protect the privacy and confidentiality of each recipient with respect to the recipient’s contribution or lack of contribution; |
|  |  |  | | (4) | | Establish appropriate procedures to safeguard and account for all contributions; |
|  |  |  | | (5) | | Donation letters may not resemble a bill or a statement [OAA § 315(b)]; and |
|  |  |  | | (6) | | Individual client’s donations shall not be tracked by accounts receivable [OAA § 315(b)(4)(C)]. |
|  |  |  | |  | |  |
|  | 2. | Any Title III and Title VII service shall not implement a Cost Sharing program unless so notified by the County. | | | | |
|  |  |  | | | | |
|  | 3. | Proof of age or citizenship shall not be required as a condition of receiving services. | | | | |
|  |  |  | | | | |
|  | 4. | An individual’s receipt of services under the In-Home Supportive Services Program shall not be the sole cause for denial of any services provided by the AAA or its contractors. | | | | |
|  |  | | | | | |
| **Data Reporting** | | | | | | |
|  | 1. | Monthly, quarterly and annual reports of data including units of service, client counts, demographics and other data as required by AAS and/or the CDA will be expected to be completed and submitted in a timely manner on required forms. | | | | |
|  |  | | | | | |
| **Program Changes** | | | | | | |
|  | 1. | AAS shall be notified in writing and approve of (at least thirty (30) days in advance of implementation) any plan for change in the service resulting from the relocation of a facility, a route change or termination, reducing the number of service days and hours of operation or change in staff. | | | | |

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| **Additional Requirements** | | | | |
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|  | 1. | Contractor assures that voluntary contributions shall be allowed and may be solicited in accordance with the following requirements: [OAA § 315(b)]: | | |
|  |  |  |  | |
|  |  | a. | Means tests shall not be used by any contractor for any Title III or Title VII Services; | |
|  |  | b. | Services shall not be denied to any Title III or Title VII client that does not contribute toward the cost of the services received; | |
|  |  | c. | Methods used to solicit voluntary contributions for Title III and Title VII services shall be non-coercive; | |
|  |  | d. | Each service provider will: | |
|  |  |  |  |  |
|  |  |  | (1) | Provide each recipient with an opportunity to voluntarily contribute to the cost of the service; |
|  |  |  | (2) | Clearly inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary; |
|  |  |  | (3) | Protect the privacy and confidentiality of each recipient with respect to the recipient’s contribution or lack of contribution; |
|  |  |  | (4) | Establish appropriate procedures to safeguard and account for all contributions; |
|  |  |  | (5) | Donation letters may not resemble a bill or a statement [OAA § 315(b)]; |
|  |  |  | (6) | Individual client’s donations shall not be tracked by accounts receivable [OAA § 315(b)(4)(C)]; |
|  |  |  | | |
|  | 2. | Any Title III and Title VII service shall not implement a Cost Sharing program unless so notified by the County; | | |
|  |  |  | | |
|  | 3. | Proof of age, citizenship, or disability shall not be required as a condition of receiving services; | | |
|  |  |  | | |
|  | 4. | An individual’s receipt of services under the In-Home Supportive Services Program shall not be the sole cause for denial of any services provided by the AAA or its contractors. | | |
|  |  |  | | |
|  | 5. | Data Reporting. Monthly, quarterly and annual reports of data including units of service, client counts, demographics and other data as required by Aging and Adult Services (AAS) and/or the CDA will be expected to be completed and submitted in a timely manner on required forms. | | |
|  |  |  | | |
|  | 6. | Program Changes. AAS shall be notified in writing and approve of (at least thirty (30) days in advance of implementation) any plan for change in the service resulting from the relocation of a facility, a route change or termination, reducing the number of service days and hours of operation or change in staff. | | |
|  |  |  | | |
|  | 7. | Contractor agrees to offer services throughout the twelve-month contract period, unless prior written approval is received from AAS. | | |
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|  | 8. | Utilize appropriate verbiage in written materials (such as newsletters, menus, newspapers, websites, flyers, publications, etc.) by avoiding the use of language that implies a price or fees for service. | | |
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|  | 9. | Contractor shall agree to distribute any needs assessment(s) or feedback surveys provided by the County. Surveys are to be returned to the County for data collection and analysis. | | |
|  |  |  | | |
|  | 10. | Contractor agrees to participate in the monitoring of the use of federal, State, and County funds. Onsite program monitoring will be conducted every two years for all programs except Title IIIC1 and Title IIIC2, which must be conducted every year. Onsite fiscal monitoring must be conducted every two years for all programs including Titles IIIC1 and C2. | | |
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|  | 11. | Program monitoring may occur more frequently if determined by AAS as beneficial to the integrity of program requirement compliance. Contractor agrees to provide requested programmatic and administrative documentation and the availability of key staff as part of the contract monitoring process. | | |
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|  | 12. | Ensure that all outreach materials, websites and publicity regarding the program shall attribute partial funding from the Older Americans Act and County of San Mateo. | | |

**INFORMATION AND ASSISTANCE PROGRAM**

**WORKPLAN GUIDELINES**

Please complete an Information and Assistance Program Workplan narrative following the order and headings shown below.

**I. PROGRAM SERVICE DESCRIPTION**

1. Agency Background and Experience:
2. State the mission of your agency or organization and describe all current programs you provide.
3. Describe your clientele and geographic area served.
4. Indicate how long the programs have been operating and how they are funded.
5. Indicate if any of these programs are currently operating under contract with San Mateo County.
6. Service to Targeted Populations and Linguistic Access:
7. Describe your ability to serve individuals within the target populations described in the General Information section.
8. Indicate the level of funding for which you are applying based on your proposed target population and indicate the city or cities within each CSA to be served.
9. How many full time employees (FTEs) do you plan to assign to this project, if you are selected?
10. Identify languages in which clients will be able to access your services.
11. Indicate staff capacity to meet the needs of the diverse racial/ethnic groups within your community.
12. Proposed Service/Ability to Meet Program Requirements:
13. Summarize your proposed service model providing detail about how it will function and meet the requirements of the program.
14. List any items that you cannot provide and how you will meet the requirements.
15. Provide information on any other pertinent services, if any, that you will offer that will reduce costs for the County.
16. Facility Site:
17. Describe the location and size of the facility, equipment available and accessibility of the building.
18. Describe the safeguards which will be used to ensure the participants' safety related to exits, outdoor space, storage areas, glass patio doors, stairs or steps, passenger loading zones, kitchen and bathroom safety.
19. Describe emergency evacuation plans.
20. List name and address of each location, capacity at each, days and hours of operation and anticipated daily attendance.
21. Coordination:
22. Identify and detail how you will work with other agencies providing similar services or serving the same population
23. Describe your procedure for documenting referrals to and/or utilization of other community-based services that support participants and their families.
24. Customer Service:
25. How will your services meet the needs of County customers and/or the public?
26. In the event of a routine problem, who is to be contacted within your organization?
27. In the event of the identification of a problem by the County, its clients/patients, and /or other applicable constituents, describe how you will address such problems and the timeframe for addressing them.
28. Outreach:

1) Describe your outreach plan, particularly to clients who may be monolingual isolated, and/or unaware of your services. Include how you plan to work with key agencies/organizations that could refer clients to your program.

2) Activities may include, but are not limited to presentations to appropriate groups in the community, printed flyers and brochures about program offerings, and information sharing with other service providers

1. Documentation: Describe your procedure for documenting contact and follow-up inquiries to your program.

**II**. **PROGRAM MANAGEMENT AND PLANNING**

1. Staffing/Volunteers:
2. Provide an organization chart for your agency.
3. Detail your staffing plan and include job descriptions and licenses (if applicable) for key personnel and volunteers.
4. Describe your use of trained volunteers.
5. Indicate the responsible person(s) for managing the day-to-day operations including the completion of the Client Intake forms, daily service delivery aspects of the program and the weekly and monthly program reporting requirements.
6. Describe how you will meet the staffing requirements when there are vacancies, illnesses or other personnel difficulties.
7. If applicable, list the professional qualifications for each individual that would be assigned to provide services requested by this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae (CV) for each such individual if the resume/CV includes all the requested information.
8. Data Reporting:
9. Describe how your agency will capture and report required program data.
10. Describe how your agency protects client level data (e.g. encryption, etc.)
11. Describe how your agency will meet the due date for program reports, (10th of the month following the month of service).
12. Training:
13. Describe staff training on-site and at other locations that address issues of concern to program participants (e.g. emergency preparedness and/or food safety and sanitation).
14. Include who will conduct trainings, how often they will occur, proposed topics and frequency of staff training or continuing education opportunities.

D. Contingency Plans:

1) Describe your contingency plans in the event that the full amount you are requesting from AAS is not received.

2) Describe potential sources of funding, short-term and long-term, for the program and any fund raising capabilities.

E. Emergency Preparedness Plans: Describe your Emergency Operations Plan.

F. Program Evaluation/Consumer Satisfaction:

1) Describe your method(s) for evaluating your program’s performance including the distribution of customer feedback surveys which will be provided by County and returned to the County for data collection and analysis.

2) Describe how you will collect information from your clients about their perception of your program and its effectiveness.

3) Describe your Quality Improvement Plan.

1. Cultural Competence:

Describe how your agency/program will ensure cultural competence. This may include culturally relevant program features, staffing objectives that reflect cultural and linguistic diversity and education materials that value the cultural diversity of San Mateo County.

H. Collaborative Service Planning:

1) Describe your involvement in the planning and development of a community-wide system of services.

2) Give an example of a program in which you collaborated with other agencies to enhance the service-delivery system for seniors and people with disabilities.

3) Identify any County committees or coalitions in which you have been involved.

1. Contributions/Project Income**:**
2. Define your agency's project income policies and procedures on setting the suggested client contribution level and guest meal cost; protecting the voluntary, anonymous contributions of your clients; handling the daily income from clients and guests; and contingency plans for securing additional revenue if proposed income level is not achieved.
3. Describe how you would use any income in excess of budgeted amount.
4. State the current average per meal contribution for this program if you are currently a congregate provider.
5. Claims, Licensure, Non-Discrimination, and Health Insurance Portability and Accountability Act (HIPAA) Violations Against Your Organization:

List any current licensure, HIPAA, non-discrimination claims against you/your organization and those having occurred in the past five years, especially any resulting in claims or legal judgments against you.

1. References:

List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided.

**III. FISCAL – Refer to the Fiscal /Budget Standards**

1. Fiscal Staff:
2. Define the fiscal staffing positions that will be responsible for this program. Include job description(s).
3. Describe your record-keeping and fiscal management systems in detail.

B. Budget forms: Complete and submit all budget forms located in the Enclosures section VI of the Request for Proposals.

C. Financial Statement:

1) Attach an audited financial statement completed within the last twelve months.

2) If an audited financial statement is not available, include alternative audit procedures you will use.

1. Cost Analysis and Budget for Primary Services:
2. Provide a detailed explanation for all costs associated with your providing the requested services if you are selected.
3. Provide a completed budget for your proposed program. Instructions and budget form is found in Enclosures Section VI.

# E. Match:

# 1) There is a match requirement of ten point five-three percent (10.53%) of the total program budget.

# 2) Describe how you will meet the required match. Refer to the Fiscal – Budget Standards.

**IV. STATEMENT OF COMPLIANCE WITH COUNTY CONTRACTUAL REQUIREMENTS**

A sample of the County’s standard contract (Including Exhibits A and B) is attached to this RFP. Each proposal must include a statement of the proposer’s commitment and ability to comply with each of the terms of the County’s standard contract, including but not limited to the following:

1. The County non-discrimination policy
2. The County equal employment opportunity requirements
3. County requirements regarding employee benefits
4. The County jury service pay ordinance
5. The hold harmless provision
6. County insurance requirement
7. The County Living Wage Ordinance
8. All other provisions of the standard contract.

In addition, the proposer should include a statement that it will agree to have any disputes regarding the contract venued in San Mateo County or Northern District of California.

The proposal must state any objections to any terms in the County’s contract template and provide an explanation for the inability to comply with the required term(s). If no objections are stated, the County will assume the proposer is prepared to sign the County standard contract template as-is.

**NOTE**: The sample Standard Contract Template enclosed with this RFP is a template and does not constitute the final agreement to be prepared for the selected service provider. Do not insert any information or attempt to complete the enclosed sample contract template. Once a provider is selected, the County will work with the selected provider to draft a provider-specific contract using the template. However, each proposal should address the general terms of the standard contract as requested within this RFP.