



REQUEST FOR PROPOSALS

Contract Cycle: State Fiscal Years 2027-29; Renewable for SFYs 2029-31

**Health Insurance Counseling and Advocacy Program (HICAP)
Family Caregiver Support Program (Title III-E)
Health Promotion Evidence-Based (Title III-D)**

Section II: BIDDERS' CONFERENCE & KEY TERMS

MANDATORY BIDDERS' CONFERENCE: PREVIEW & PROCEDURES

Agency on Aging Area 4 (AAA4) **requires** all prospective Applicants for funding under this Request for Proposal (RFP) to participate in the Bidders' Conference. **Applicant organizations without a designated representative (as defined below) participating in the Conference will be deemed ineligible to receive funding under this RFP.**

The Bidders' Conference will take place on the Zoom meeting platform. Participation via Zoom may either be by videoconference or teleconference; joining by videoconference requires the Zoom software (which can be downloaded for free on a computer or smart device); joining by teleconference does not require Zoom software. As this is a **mandatory** meeting, participants must identify themselves and which group they represent. This will be done by taking roll at the beginning of the Bidders' Conference as well as at the end.

Prospective Applicants are strongly advised to review the RFP prior to the Bidders' Conference and identify any questions they may have about the material. Much of the meeting will be devoted to "Q&A" and clarifications.

Following the Bidders' Conference:

- As soon as possible, a summary of questions and answers from the Conference will be posted on a dedicated "RFP Q&A" area on our website at: <http://agencyonaging4.org>
- Any additional questions about the RFP must be received by AAA4 in writing **no later than October 8, 2026**. Send questions by e-mail to rfp@agencyonaging4.org, Subject Line: RFP Question.
- AAA4 will post answers as questions are received. All answers should be posted by October 12, 2026; if this is not possible for some unforeseen reason, all prospective Applicants will be notified of the delay.

**Bidders' Conference
Thursday, October 1, 2026
1:30 PM – 3:00 PM (noon) Pacific**



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There is no physical location for this conference. The link and call-in information will only be sent to those individuals who have completed a Letter of Interest Form by the deadline. This is not a public meeting; unidentified participants may not be permitted to stay.

KEY TERMS

Throughout this RFP, the terms listed below shall have the definitions provided here. It is the responsibility of the Applicant to be aware of these definitions and to apply them accordingly.

Aging and Disability Resource Connection (ADRC) – Means an entity designated by the State of California as part of the State system of long-term services and supports (LTSS), to provide a coordinated system for: (1) comprehensive information on the full range of available public and private long-term care services and supports (LTSS), options, service providers, and resources within a community; (2) person-centered counseling to assist individuals in assessing their existing or anticipated long-term services and supports (LTSS) needs, and developing and implementing a plan for long-term care designed to meet their specific needs and circumstances; and (3) consumer access to the range of long-term services and supports (LTSS) programs for which they may be eligible, by serving as a convenient point of entry for such programs. Core partners of ADRCs are typically AAAs and the local independent living centers.

Applicant vs. Funded Partner – Requirements/Expectations in this RFP are directed to either Applicants or Funded Partners. The term *Applicant* is used when the policy/requirement must be met prior to or while applying for funds administered by AAA4. The term *Funded Partner* is used when the policy/requirement must be met after the award of funds administered by AAA4.

Area Plan – Every area agency on aging must create and maintain a written plan describing the organization's goals and objectives. AAA4's current Area Plan covers 2024 through 2028.

At Risk for Institutional Placement – With respect to an older individual, that such individual is unable to perform at least 2 activities of daily living without substantial assistance (including verbal reminding, physical cueing, or supervision) and is determined by the State of California to be in need of placement in a long-term care facility.

California Department of Aging (CDA) – The department within state government that is designated as the State Unit on Aging. AAA4 contracts with CDA to receive both federal and state funding.



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Caregiver – The Older Americans Act distinguishes between two types of caregivers: Family Caregivers and Older Relative Caregivers. Both terms are listed separately in this part.

Client-Level Data – Means all confidential, sensitive, personal identifying information collected from former, current and prospective clients. Service Categories that require client level data be collected and submitted are called Registered Services; those that do not require client level data collection are called Non-Registered Services. Such data is required to be held confidentially by all personnel with access to said data, regardless of format (paper or electronic).

Comprehensive and Coordinated System – A system for providing all necessary supportive services, including nutrition services, in a manner designed to: (1) facilitate accessibility to, and utilization of, all supportive services and nutrition services provided within the geographic area served by such system by any public or private agency or organization; (2) develop and make the most efficient use of supportive services and nutrition services in meeting the needs of older individuals; (3) use available resources efficiently and with a minimum of duplication; and (4) encourage and assist public and private entities that have unrealized potential for meeting the service needs of older individuals to assist the older individuals on a voluntary basis.

Conflict of Interest (avoidance of) – Means the prevention of employees, consultants or members of governing bodies from using their positions for purposes including, but not limited to, the selection of Subcontractors that are, or give the appearance of being, motivated by a desire for private gain for themselves or others, such as family, business or other ties.

Contract Cycle – The designated timeframe for which no additional RFPs are expected to be held for a particular service (the maximum allowable timeframe is 4 years).

Contract Period – The designated timeframe for a particular contract agreement (usually the maximum allowable timeframe of 1 year; sometimes less).

Designated Representative – The Executive Director, President, CEO, Owner and Co-Owner of an organization as well as any officer of the governing body of an organization shall automatically be considered designated representatives of said organization by virtue of their status. Any other person may be recognized as a designated representative of an organization if they have been given written permission from a duly authorized individual to speak or act on behalf of that same organization.

Disability – A disability attributable to mental or physical impairment, or a combination of mental and



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physical impairments, that results in substantial functional limitations in 1 or more of the following areas of major life activity: (1) self-care, (2) receptive and expressive language, (3) learning, (4) mobility, (5) self-direction, (6) capacity for independent living, (7) economic self-sufficiency, (8) cognitive functioning, and (9) emotional adjustment. {See also, Severe Disability}

Family Caregiver – An adult family member, or another individual, who is an informal provider of in-home and community care to an older individual or to an individual with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction.

Focal point – A "brick and mortar" facility that acts as a central location from which people can access a variety of services and supports for older adults (such as a multipurpose senior center) is a focal point if it has been designated as such by an Area Agency on Aging.

Food Insecurity – Being without reliable access to a sufficient quantity of affordable nutritious food.

Frail – With respect to an older individual, that the older individual is determined to be functionally impaired because the individual: (1) is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; or (2) at the option of the State, is unable to perform at least three such activities without such assistance; or (3) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

Functionally Impaired – A condition in which some part of the body is not working at full capacity, resulting in a reduction in physical or mental capacity sufficient to interfere with managing day to day tasks.

Greatest Economic Need – The need resulting from an income level at or below the poverty line.

Greatest Social Need – The need caused by non-economic factors, which include: (1) physical and mental disabilities; (2) language barriers; and (3) cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, that restricts the ability of an individual to perform normal daily tasks; or threatens the capacity of the individual to live independently.

Long-Term Care (LTC) – Any service, care, or item (including an assistive device), including a disease prevention and health promotion service, an in-home service, and a case management service: (1) intended to assist individuals in coping with, and to the extent practicable compensate for, a functional



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impairment in carrying out activities of daily living; (2) furnished at home, in a community care setting, or in a long-term care facility; and (3) not furnished to prevent, diagnose, treat, or cure a medical disease or condition.

Mandated Reporters – People who are in regular contact with vulnerable older and dependent adults and are subsequently required by California law to ensure a report is made when abuse is observed or suspected.

Means Test – The use of an older person's income or resources to deny or limit that person's receipt of services.

Office of Management and Budget (OMB) – The executive agency that advises the President on the federal budget and sets national fiscal policies for governmental agencies and recipients of government funds.

Older Adult – Individuals aged 60 years or older.

Older Relative Caregiver – A caregiver who is age 55 or older and is either the primary caregiver for a related child or for an adult with a disability. This term was previously referred to as “kin” caregivers.

One-Time-Only (OTO) Funding – Unexpected funds from the previous fiscal year which have been reallocated to AAA4 for one-time use.

Person-Centered - A set of approaches designed to assist someone to plan their life and supports. It is used most often as a life planning model to enable individuals with disabilities or otherwise requiring support to increase their personal self-determination and improve their own independence.

Remote Rural Area – Open country and settlements with fewer than 2,500 residents. Based upon decennial census figures, the federal Administration on Aging works with the U.S. Census Bureau to estimate the number of older adults residing in rural areas for each Planning and Service Area, each County and each Zip Code.

Scope of Service – The number of units of service expected to be provided during the contract period. The service categories defined in this RFP must have an approved Scope of Service before a contract agreement can be executed.

Self-Directed Care – An approach to providing services (including programs, benefits, supports, and



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technology) under the OAA intended to assist an individual with activities of daily living, in which: (1) such services (including the amount, duration, scope, provider, and location of such services) are planned, budgeted, and purchased under the direction and control of such individual; (2) such individual is provided with such information and assistance as are necessary and appropriate to enable such individual to make informed decisions about the individual's care options; (3) the needs, capabilities, and preferences of such individual with respect to such services, and such individual's ability to direct and control the individual's receipt of such services, are assessed by the agency involved; (4) based on the assessment made, the agency develops together with such individual and the individual's family, caregiver, or legal representative: (a) a plan of services for such individual that specifies which services such individual will be responsible for directing; (b) a determination of the role of family members (and others whose participation is sought by such individual) in providing services under such plan; and (c) a budget for such services.

Service Category – The types of services that are fundable under this RFP coincide with Service Categories that have been pre-established by the Federal Administration on Aging (e.g., Legal Services, Caregiver Respite, etc.). Each Service Category in this RFP has a Program Specification within Section 3.

Severe Disability – A severe, chronic disability attributable to mental or physical impairment, or a combination of mental and physical impairments, that: (1) is likely to continue indefinitely; and (2) results in substantial functional limitation in 3 or more of the major life activities.

Supplantation – When a State or unit of local government reduces State or local funds for an activity specifically because federal funds are available (or expected to be available) to fund that same activity.

Unduplicated Count – The number of individuals who have participated in a program one or more times during a given period (e.g., month, quarter, year).

Wait List – A Wait List exists whenever a Funded Partner begins collecting and retaining information from prospective clients who cannot be served for an unknown period because the capacity of the program has been exceeded. A Wait List is either open or closed.