REQUEST FOR PROPOSALS

Contract Cycle: State Fiscal Years 2025-27; Renewable for SFYs 2027-29

Supportive Services (Title III-B)
Nutrition Services (Title III-C)
LTC Ombudsman & Elder Abuse Prevention (Title III-B & VII)

Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

<u>PROPOSAL REVIEW PROCESS</u>

The Agency on Aging Area 4 (AAA4), a joint powers authority with nonprofit status, is the State designated area agency on aging for Planning and Service Area 4. The California Department of Aging (CDA) has granted authority to AAA4 to establish, within the constraints of State and Federal regulation, a procurement process to contract with local entities for the provision of services. To that end, AAA4 reserves certain rights that may be exercised before, during or after the contract period. These include, but are not limited to, the right to:

- Consider written and/or oral testimony from designated representatives of Applicants and pose questions to and/or request further information from designated representatives of Applicants prior to making a final decision if doing so does not create an unreasonable delay of the decision-making process as determined by the presiding AAA4 officer; and,

- Award additional funding or less funding than a particular Applicant has requested while also considering the most economical use of federal dollars; and,

- Ensure that Applicants satisfy certain conditions prior to the execution of a Contractual Agreement, and/or ensure that Funded Partners satisfy certain conditions by a specified date during the term of said Agreement.

AAA4's regular procedure for contracting services is to issue a Request for Proposals (RFP) that defines the terms for the purchase of services.

The initial contract period for all services included in this RFP is one (1) fiscal year, beginning July 1, 2025, and ending June 30, 2026. AAA4 reserves the right to extend each agreement one additional year, beginning July 1, 2026, and ending June 30, 2027, subject to funding availability and the Funded Partner's fulfillment of contractual responsibilities.

Furthermore, AAA4 reserves the right to renew any or all Title III-B, Title III-C, and Title VII contracts for a maximum of two additional fiscal years without requiring Funded Partners to reapply or compete for continued funding. Those decisions shall be made by the Governing Board of AAA4 and shall remain contingent upon the availability of funds and the satisfactory fulfillment of contractual responsibilities. In accordance with State law, no service contract arising from this RFP shall extend beyond June 30, 2029.

AGENCY ON AGING AREA 4

REQUEST FOR PROPOSALS
Contract Cycle: State Fiscal Years 2025-27; Renewable for SFYs 2027-29
Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

1. **FISCAL & ADMINISTRATIVE AGENTS**

   All proposals must be submitted by a <u>single applicant organization</u> that is willing to act as the principal fiscal and administrative agent. Minimally, the role of the principal fiscal and administrative agent (a.k.a., principal agent) shall include top-level oversight, management, communication, budgeting, accounting and auditing of the proposed service. The principal agent may, itself, also perform all functions needed to sustain the delivery of services on a day-to-day basis.

   Alternatively, the principal agent may partner/subcontract with one or more other organizations to perform some or all necessary day-to-day service functions. Any proposal that states or implies such a relationship must attach a formal Letter of Commitment from each organization involved. If selected, AAA4 shall review and approve applicable agreements between the committed parties before AAA4 enters into a contract with the principal agent.

   When an Applicant organization enters into a contractual relationship with AAA4, it becomes a "Funded Partner" of AAA4, and it alone assumes <u>full</u> responsibility for fulfilling the terms and conditions of said contract. See Section VI: Contractual Agreements.

2. **RESPONSIBLE ACTORS**

   The intent of the RFP process is to select the Applicant best suited to provide the services in question and to do so through a fair and open competitive method that is consistent with State and Federal standards. Those standards include the following provision which appears as item (b)(8) in Section 92.36 Procurement, of Title 45 Public Welfare, Subtitle A, Subchapter A of the United States Code of Federal Regulations:

   > "<u>Grantees and Subgrantees will make awards only to responsible subcontractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources.</u>"

   To be clear, in this context the Grantee is the California Department of Aging, the Subgrantee is AAA4, the Contractors/Subcontractors are the Applicants for state and federal funding, and the "proposed procurement" is this RFP document.

   AAA4 will provide grants reviewers with a Past Performance Report for any Applicant Organization that has contracted with AAA4 in the last ten years.

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Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

3. **REVIEW AND APPROVAL OF PROPOSALS**

   AAA4's Contracts Department is responsible for conducting this Request for Proposals. This Department includes the following AAA4 Staff: the Planner Administrator, the IT Administrator, the Contracts Manager and the Contracts Coordinator. To maintain neutrality, these Staff do not review proposals for content and do not make funding recommendations.

   AAA4's Grants Review Committee (GRC) is charged with reviewing RFP applications and recommending funding. The GRC is a standing committee of the AAA4 Governing Board, comprised of Governing Board and Advisory Council members. Due to the high volume of proposals expected to be received during this RFP cycle, the GRC will be divided into two or more review teams, and each of these teams will function as an ad hoc subcommittee of the GRC. As such, they are not subject to the Brown Act. One or more members of the Contracts Department will facilitate the GRC review team meetings to ensure compliance with RFP policies and procedures.

   AAA4's Contracts Department will assemble and facilitate small teams of third-party reviewers (experienced individuals working elsewhere in California) to review any proposals to replace services currently being provided directly by AAA4. For all other proposals, the Contracts Department will assign AAA4 Staff to serve on internal review teams.

   AAA4 Staff, Advisory Council and Governing Board members, and third-party reviewers are strictly prohibited from speaking to Applicants about the content or status of proposals outside of the process described in this section during an active RFP. In most circumstances, an RFP is "active" on the date the RFP is issued and ends on the date final award decisions have been made; in the event of an appeal, all the proposals in the affected service category remain "active" until the date of final resolution of that appeal.

   A. **Technical Review:**

      AAA4 will not review any proposals submitted before the deadline for submission.

      Applicants must ensure the application is complete and includes all necessary attachments. *Failure to do so may render the proposal non-responsive and ineligible for funding consideration. An Applicant may also render its own proposal ineligible by withdrawing it prior to a final award decision.*

      In the event an Applicant appears or claims to have made a technical error or omission in their application, the Contracts Department will notify the Executive Director of AAA4 (or his/her designee), and they shall, on a case-by-case basis, determine how to proceed, set a deadline for doing so, and retain documentation of the matter.

AGENCY ON AGING AREA 4

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Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

B. Proposal Status within a Specific Funding Category:
AAA4 has defined the following terms to describe the status of particular applications with respect to an RFP:

i. <u>No Response</u>: If no eligible proposal is received, then for the balance of the contract cycle AAA4 can seek State approval to: 1) negotiate a noncompetitive service agreement with another organization to provide the same type of service; 2) provide the service directly; or 3) expend the funds in whatever manner is deemed most appropriate by the AAA4 Governing Board.

ii. <u>Noncompetitive Proposal</u>: If only one eligible proposal is received, it is classified as being Noncompetitive. Based upon the merits of the proposal, AAA4 may recommend no funding, partial funding, full funding, excess funding and/or conditional funding.

iii. <u>Competitive Proposals</u>: When two or more eligible proposals are received and the total funding requested **exceeds** the total funding available in the category, these are considered Competitive Proposals, and at least one Applicant will not receive the full amount they have requested. AAA4 may recommend any combination of no funding, partial funding, full funding, excess funding and/or conditional funding.

To be clear, under no circumstance is an Applicant guaranteed to receive funding under this RFP prior to a final funding decision being made.

C. Evaluation Criteria:
In accordance with State regulations, proposals will be rated on six major factors which are of equal importance:

1. <u>The Applicant Organization's Leadership Experience in relation to Aging Services</u>
2. <u>Compatibility with AAA4 Program Parameters</u>
3. <u>The Quality of the Applicant Organization's Service Plan</u>
4. <u>The Qualifications of the Applicant's Personnel who would operate the Program</u>
5. <u>The Adequacy of the Applicant Organization's non-AAA4 Assets and Resources</u>
6. <u>The Cost Effectiveness of the Proposed Program</u>

As specified in the California Code of Regulations, proposals to replace services that are currently being provided directly by AAA4 "will be evaluated on the improved quality of services and cost-effectiveness compared to the current service provider" (22 CCR Section 7354(b)(14(G)). See Section 7 for corresponding information on AAA4's Yuba-Sutter Nutrition, Case Management and LTCOP & EAP programs.

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Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

The RFP Proposal Evaluation Tool provides a standard template for use by AAA4 Staff, AAA4 Grants Reviewers and third-party reviewers. It is attached to this Section. As AAA4's decision-making body, the AAA4 Governing Board has the authority to make awards based upon factors other than those explicitly stated above. In such cases, a full justification for the decision shall be documented.

D. Recommendation and Approval Process

Regular meetings of the Governing Board are open to the public. Designated representatives from Applicant organizations will be allowed to speak on behalf of their proposal and may be asked questions about it (see RFP Timeline for dates and locations of meetings). Grants Review Committee (GRC) training sessions are not regular meetings and are not open to the public. GRC review teams are open to the public at some times and closed to the public at other times, as described below. Third-party review team training and meetings are not open to the public.

i. Third-Party Review Teams: A group of three or more experienced individuals will independently review and rate all proposals submitted in a particular service category. In closed session, they will then deliberate among themselves to formulate a single recommendation and the rationale for that recommendation. Please note these recommendations are advisory to the Governing Board; it is not binding.

ii. Staff Review Teams: A group of three or more AAA4 staff members will independently review and rate all proposals submitted in a particular service category. In closed session, staff will then deliberate among themselves to formulate a single recommendation and the rationale for that recommendation. The AAA4 Executive Director reserves the right to accept or alter this recommendation. AAA4 staff recommendations are also subject to change based upon new information that may come forward during the normal course of the RFP review process. Please note that staff recommendations are advisory.to the Grants Review Committee and the Governing Board; they are not binding.

iii. Grants Review Committee Teams: While third-parties and AAA4 staff conduct their reviews, groups of three or more Grants Review Committee (GRC) members will agree to independently review and rate the proposals submitted under this RFP. These groups (ad hoc subcommittees) are called Grants Review Teams.

First, at a designated date and time, each Grants Review Team will meet in closed session to hear each member's initial evaluation and to attempt to reach an initial recommendation on each proposal; consensus is desirable but not required. The

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Contracts Department facilitator will <u>not</u> disclose Third-Pary or AAA4 Staff ratings or recommendations, but they can share a list of pre-determined questions the other review team plan to ask the Applicant. Prior to adjourning, the Grants Review Team should decide which of its members will serve as the acting Chair (who will preside over the corresponding open session). If applicable, the Team should also discuss the order in which proposals will be heard.

Second, the Grants Review Team will meet in <u>open</u> session(s) at a specified date and time (*to be determined*) to present their initial recommendation(s), to hear the initial third-party or AAA4 Staff recommendation, to hear from the Applicant (if present), to ask questions, and to vote upon a funding recommendation to give to the Governing Board. The standard sequence of steps for these open sessions is as follows:

(a) The acting Chair of the Grants Review Team introduces themselves and their fellow Team members and asks the other parties present to introduce themselves.

(b) Proposals will be fully discussed and acted upon one by one. If there is only one proposal being discussed, then proceed to step "c." If there are multiple proposals being discussed, then the acting Chair announces the order in which they will be heard, before proceeding to step "c".

(c) <u>Before</u> hearing any comments from third-party or AAA4 Staff Reviewers and <u>before</u> hearing any testimony from the Applicant, each of the Grants Review Team members, in turn, shares their initial overall rating (grade) of the proposal and states whether they feel the proposal should be fully funded, partially funded or not funded.

(d) On behalf of the third-party or AAA4 staff review team, one person (a reviewer or a Contracts Department representative) presents the following information, none of which is shared with the Grants Review Team in advance:
   • The third party or AAA4 Staff's initial overall rating (grade) of the proposal; and,
   • AAA4 Fiscal Department's assessment of the Applicant's budget and financial statements; and,
   • The Past Performance Report (if applicable); and,
   • The third party or AAA4 Staff's initial funding recommendation and rationale.

(e) Within a pre-established timeframe, one or more designated representatives of the Applicant organization will be given an opportunity to orally address the Grants Review Team in support of their proposal.

(f)   The acting Chair of the Committee will then facilitate a discussion of the proposal, during which time questions may be posed directly to Applicants. [GRC members who did <u>not</u> read and rate the proposal(s) being discussed may participate in the discussion but may not cast a vote regarding said proposal(s).]

(g)   The acting Chair will entertain any further discussion.

(h)   Where there are competitive proposals, steps "c" through "g" will be repeated until all proposals in the funding category under discussion have been addressed.

(i)   The acting Chair will request a motion which clearly identifies which proposal should be funded at which amount(s) and the GRC Grants Review Team's rationale for doing so.

(j)   Deliberation will continue for as long as the acting Chair deems it necessary to uphold a fair and open consideration of the matter.

(k)   Votes will be conducted until a final motion has been passed by the Committee Grants Review Team via a simple majority vote. [Grants Review Team decisions are <u>advisory</u> to the AAA4 Governing Board; they are not binding.]

NOTE: If a recommendation is made to award substantially more or less funding than an Applicant has requested within a given service category, then a revision of the original proposal may be requested by the Contracts Department to determine how a change in the award amount would impact the Applicant's ability to implement the proposal.

iv.   <u>Governing Board</u>: All members of the Governing Board will be given advance access to all proposals submitted under this RFP, and they are welcome to conduct their own independent reviews as they see fit.

Approval of a recommendation for funding under this RFP will be a Board Meeting action item and will be handled in accordance with formal parliamentary procedure.

First, any Board member who has a conflict of interest shall state that conflict and shall recuse themselves from the associated portion of the meeting. Next, the item will be presented by a Contracts Department representative and/or a representative from the Grants Review Team, then a motion would need to be made and seconded. [Motions to award funds shall include a clear, sound rationale; if the rationale is based upon factors beyond the Evaluation Criteria, then a supporting justification is also needed.]

Section V: PROPOSAL REVIEW PROCESS and EVALUATION TOOL

Once a motion is on the floor, a discussion period would commence, public comment (including comments from Applicants) would be received, questions may be posed and answered, and further deliberation may follow. Prior to a roll call vote, Third party reviewers, AAA4's Executive Director and Grants Review Team reviewers may still revise their recommendations. A simple majority of the voting Board members present is needed for the motion to carry.

The Governing Board has the authority to recommend approval of funding requests from governmental, public, and nonprofit organizations; however, the California Department of Aging (CDA) reserves the right to overturn such a decision given sufficient cause.

The Governing Board does <u>not</u> have the authority to approve funding requests from for-profit organizations; to do so, pre-approval must be requested by AAA4 (at the direction of the Board) and granted by CDA before a Contract Agreement can be executed.

The Governing Board does not have the authority to designate a new Long-Term Care Ombudsman Program; to do so, pre-approval must be requested by AAA4 and a transition plan must be submitted by AAA4 (both at the direction of the Board) and these must be granted/approved by CDA before a Contract Agreement can be executed.

E. Appeals Process
i. <u>Initiating an Appeal to AAA4</u>
An Applicant may appeal an award decision made by AAA4's Governing Board under this RFP by sending a written appeal via e-mail to AAA4's Executive Director (Pam Miller) at: <u>pmiller@agencyonaging4.org</u> AND to the Contracts Department at: <u>rfp@agencyonaging4.org</u> by **12:00 Noon on May 16, 2025**. Appeals shall set forth the action or actions being protested and the reason(s) the Applicant finds such action unsatisfactory. Grounds for appeal exist only under the following conditions:

a) A conflict of interest existed among a member of the Third-Party Review Team, the Grants Review Team and/or the Governing Board; or,

b) A procedural error occurred that resulted in denial to the Applicant of a fair hearing; or,

c) A Board finding was not supported by substantive evidence, and the correction or modification of the finding could materially change the outcome of the proceedings.

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ii. <u>Hearing of Appeals</u>
If any appeals are received by the deadline, they will be heard by the AAA4 Governing Board in accordance with the RFP Timeline. The Governing Board will rule whether to uphold or deny the appeal.

If the appeal is denied by the Governing Board, applicants will be notified of their right to appeal directly to the California Department of Aging in accordance with Chapter 5 of Title 22, Division 1.8 of the California Code of Regulations

AGENCY
ON AGING
AREA 4

REQUEST FOR PROPOSALS

Contract Cycle: State Fiscal Years 2025-27; Renewable for SFYs 2027-29

EVALUATION TOOL

SERVICE CATEGORY:	TRANSPORTATION		NAME OF REVIEWER:	
SERVICE AREA:			DATE OF INITIAL REVIEW:	
APPLICANT'S NAME:			DATE(S) OF ANY EDITS:	
FUNDING REQUESTED:			FUNDING RECOMMENDED:	

The purpose of this Evaluation Tool is to provide each reviewer with a standard template to use to formulate their ratings and to capture those ratings in a consistent manner for easy comparison. This Tool will be included in the RFP Packet so that all Applicants and any other interested parties have advance knowledge as to how proposals will be evaluated, in accordance with State regulation.

Evaluation Criteria:
Each RFP Proposal will be rated on these six major factors which are of equal importance:

I.	The Applicant Organization's Leadership Experience in relation to Aging Services
II.	Compatibility with AAA4 Program Parameters
III.	Quality of the Applicant Organization's Service Plan
IV.	Qualifications of the Applicant's Personnel who would operate the Program
V.	Adequacy of the Applicant Organization's non-AAA4 Assets and Resources
VI.	Cost Effectiveness of the Proposed Program

AGENCY
ON AGING
AREA 4

Rating Instructions for Proposal Reviewers:
AAA4 Staff will provide training to reviewers to help ensure consistent interpretation of written materials and a thorough understanding of the RFP review process.

Rating Guide:
As shown in the chart below, a standard letter grade system has been adopted for ease of use (please do not use pluses or minuses). Ideally, any Undecided ratings will be changed after the Applicant has an opportunity to answer reviewers' questions.

Rating	Quality of Response	Description	Strengths Relative to Requirements	Weaknesses Relative to Requirements	Confidence in Proposal
A	Outstanding	Proposal addresses requirements completely, exhibits outstanding knowledge, creativity, innovation or other factors that justify this rating	Meets requirements – numerous strengths in key areas	None	Very high
B	Good	Proposal addresses requirements completely and addresses some elements in an outstanding manner	Meets requirements – some strengths in key areas	Minor – not in key areas	High
C	Fair	Proposal addresses most elements of the requirements	Meets most requirements – minimal strengths provided in response	Moderate – does not outweigh strengths	Moderate
D	Poor	Proposal meets some of the requirements	Meets some of the requirements with some clear strengths	Exist in key areas – outweighs strengths	Low
F	Failed	Proposal meets few to none of the requirements	Meets few to none of the requirements with few or no clear strengths	Significant and numerous	None
U	Undecided	Proposal is unclear or the information given is contradictory. Cannot rate properly with clarification from the Applicant	To be determined	To be determined	Uncertain

1. The Applicant Organization's Leadership Experience in relation to Aging Services: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING
Mission & History	101. What is your organization's mission statement, when was it first established, and when was it last revised? 102. Historically, what major successes has the organization had in advancing its mission? 103. In what specific ways does the proposed program advance the mission of your organization?	
Direct Experience	104. Is your organization already providing the same type of service that is being requested in this proposal (with or without AAA4 funds)? YES NO UNSURE > If yes, how long has this service been provided?	
Organizational Readiness	*Skip to the next section*	
Administrative Readiness	105. Does your organization already meet AAA4's Fiscal Accountability and Compliance requirements for Funded Partners? YES NO UNSURE 106. Does your organization currently have staff with the necessary skills in data management and/or database entry? YES NO UNSURE 107. Does your organization currently meet AAA4's Information Technology (IT) requirements for Funded Partners? YES NO UNSURE	
Good Standing	[AAA4 Staff will determine if the Applicant is in Good Standing.]	
Past Performance	[AAA4 Staff will provide a Past Performance Report during the open Review Team meeting. At that time, reviewers should evaluate whether that Report raises questions about the Applicant's ability to perform going forward?]	
REVIEWER NOTES/COMMENTS:		OVERALL RATING*

*The overall rating may or may not equate to an overall average of each part or of each question.

2. Compatibility with AAA4 Program Parameters: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING
{Program Purpose}	201. How many unduplicated individuals would be served in the first year of the contract cycle? 202. Assuming funding levels remain the same, how many unduplicated individuals would be served in the second year? 203. What specific steps would be taken to reduce these types of barriers?	
Required Activities	204. What type of service is being proposed?	
Allowable Activities	205. What is being proposed: door-to-door, curb-to-curb, or a combination of both?	
Prohibited Activities	*Not Applicable*	
Geographic Service Area	206. Describe the geographic area that clients must reside within to receive services, and list the major cities, towns and places that fall within that area. 207. Please describe service limitations on any trips that would take a client outside their county of residence.	
Service Coordination	208. Does the Applicant propose to formally partner/subcontract with another organization? YES NO UNSURE > If Yes, what is the name of the other organization(s) and what OAA services would they provide? 209. Please list other organizations with whom you have coordinated.	
Client Eligibility	210. How will the proposed program affirm whether prospective clients are Transportation Disadvantaged?	
Client Prioritization	*Not Applicable* | Client Wait Lists | *Not Applicable*	
Service Referrals	211. What method would be used to determine if individuals who successfully "connect" with the programs and services to which they are most frequently referred?	
Unique Program Standards	212. What types of vehicles would be used (e.g. buses, passenger vans, SUVs, sedans), and would these vehicles be able to accommodate riders with wheelchairs and walkers? 213. If direct transportation services are provided, describe who would own, operate and maintain the vehicles to be used. 214. If transportation vouchers were provided, describe how the program would operate, including but not limited to: the distribution process; limitations on redemption values and numbers of vouchers per client; and how redemption rates would be managed. 215. Use the table below to estimate what percentage of rides will be provided for each of the specified purposes.	

	216. Roughly what percentage of all trips would be considered high-mileage trips? What percentage would be long-duration-short-mileage trips?			
Special Rights	*Not Applicable*	Specified Legal References	*Not Applicable*	

REVIEWER NOTES/COMMENTS:	OVERALL RATING*

*The overall rating may or may not equate to an overall average of each part or of each question.

3. Quality of the Applicant Organization's Service Plan: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING
Service Goals	301. What overarching goals has the Applicant Organization set for the proposed program to achieve?	
	302. In what specific ways is the community expected to benefit from the proposed program, including the clients themselves, clients' households, and clients' supporting family/friends/neighbors?	
	303. How will the local Aging Services Network benefit from the proposed program?	
Outreach	304. Whom is the proposed program's primary audience? Summarize their unique set of characteristics or circumstances.	
	305. Within your primary audience, roughly what percentage (from 0% to 100%) would you expect to fall into each of these potentially underserved categories below.	
	306. What specific methods would be used to reach which underserved individuals (from the previous question)?	
	307. If applicable, briefly discuss categories of underserved individuals who seem unlikely to participate in the proposed program regardless of how much outreach is done.	
Resources	308. What key resources are needed to provide the proposed service (e.g., equipment, tools, products, personnel, etc.).	
Delivery of Services	309. Briefly describe the basic service plan, or service model, the proposed program will follow.	
	310. Why was this service plan/model chosen for your proposed program?	
	311. Can this service plan/model be scaled up and down easily to serve substantially more or less clients?	

	312. How is your service model adaptable to unforeseen events (i.e., sudden cost increase, staffing change, emergencies, etc.?	
	313. Briefly explain how prospective clients will be screened, assessed and prioritized?	
	314. How will individuals' food security be evaluated?	
	315. How will individuals' housing security be evaluated?	
	316. What specific personal choices will each prospective client be allowed to make about how services are provided to them?	
Data	317. How will the proposed program collect and track the number of service units that are provided on any given day, month, quarter and fiscal year?	
	318. How will the proposed program collect and track the number of unduplicated clients who are served on any given day, month, quarter and fiscal year?	

3. Quality of the Applicant Organization's Service Plan: CAREGIVER OUTREACH (Part 3 continued)

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING

Service Outcomes	319. What specific tangible and/or intangible outcomes will be measured with respect to:
	    i) serving individual clients, clients' households, and clients' supporting family/friends/neighbors;
	    ii) benefiting the local Aging Services Network; and,
	    iii) connecting clients with other appropriate resources?	

	320. How will each of these outcomes be collected?	
	321. How has the proposed program defined varying levels of "success" for each of these outcomes?	
Evaluation	322. During the fiscal year, what specific methods will be used to evaluate the effectiveness of the proposed program based on input from clients, staff, volunteers and any pertinent third parties?	
	323. At the end of each fiscal year, what additional methods will be used to evaluate the effectiveness of the proposed program based on final figures, results or impacts?	
	324. What processes are in place to directly link evaluation findings to improvements in the proposed program?	

REVIEWER NOTES/COMMENTS:	OVERALL RATING*

*The overall rating may or may not equate to an overall average of each part or of each question.

4. Qualifications of the Applicant's Personnel who would operate the Program: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING
Human Resources	401. Would your organization need to acquire new or additional staff and/or volunteers to be able to begin fully providing the proposed service? **YES NO UNSURE** > If yes, what positions would need to be filled and, for each, at how many FTEs (full-time equivalents based on a 40 hour work week)? 402. During state fiscal year 2025-26, what major variations do you predict will happen in the demand for the proposed services? In the supply of resources for the proposed services?	
Volunteers	403. Would the proposed program use volunteers? **YES NO UNSURE** If so, how many and in what roles?	
Hiring and Retention	404. What minimum qualifications (education and work experience) are required of the person who will have the most direct, day-to-day oversight of the proposed program, and what is their job title? 405. What minimum qualifications (education and work experience) are required of the person(s) who will have direct contact with clients? 406. How long do staff and volunteers typically stay with the Applicant Organization, and what are the most common reasons they leave? 407. Are wages and benefits comparable to those of similar organizations in the service area, and how have you made that determination?	
Review and Recognition	408. When was the last time a staff member or volunteer was openly recognized by your organization's leadership for outstanding work performance, and for what accomplishment(s) were they recognized?	
Training and Outreach	409. What specific training, if any, do staff and volunteers receive about other local programs that serve the same target population? 410. What specific training, if any, do staff and volunteers receive about encouraging each individual client to make personal choices that direct how services are provided to them? 411. What specific training, if any, do staff and volunteers receive about food security? 412. What specific training, if any, do staff and volunteers receive about housing security?	

5. Adequacy of Applicant Organization's non-AAA4 Assets and Resources: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION QUESTIONS	RATING
Fiscal Sustainability	501. Is your organization fiscally sound, and how did you make that determination?	
Assets	502. Does your organization need to acquire any major assets (valued at $5,000 or more) to be able to fully provide the proposed service? **YES NO UNSURE**	

Revenue	503. What percentage of the Total Program Resources is comprised of the requested AAA4 Award?
	  > If <u>not</u> awarded any funds under this RFP, would some form of the proposed service be provided anyway?
	504. What measures would be taken to assure client contributions are voluntary and anonymous? What measures would be taken to assure client contributions are being collected and accounted for properly?
	505. Is this proposal contingent upon receipt of a grant from another source? **YES NO UNSURE**
	  > If yes, when will your receipt of said grant be determined?
	  > If said grant is <u>not</u> awarded, how would this proposal need to be altered to remain viable?	

Expenditures	*Not Applicable*	

REVIEWER NOTES/COMMENTS:	OVERALL RATING*

*The overall rating may or may not equate to an overall average of each part or of each question.

6. Cost Effectiveness of the Proposed Program: TRANSPORTATION

SUBJECT	PROGRAM APPLICATION [Reviewer Questions]	RATING
Annual Service Costs: Total Cost/Unit of Service AAA4 Cost/Unit of Service	[Has the Applicant committed enough total resources to provide the program as proposed?] [Given the total resources that have been committed, does the estimated total number of minor home modifications seem achievable?] [If applicable, how does the AAA4 Cost/Unit of Service compare to TRANSPORTATION proposals from other Applicants under this RFP?]	
Annual Estimated Service Value: Direct Savings/Client/Year Indirect Savings/Client to the Long-Term Care System	[Does the average number of units each client receives seem appropriate?] [Does the market value rate for modifications seem reasonable?] [Does the Direct Savings/Client/Year seem substantial?] [Does the program appear to be more cost-effective than the public alternative?]	
Return on Investment (ROI)	[If applicable, how does the ROI compare to TRANSPORTATION proposals from other Applicants under this RFP?	
REVIEWER NOTES/COMMENTS:		OVERALL RATING*

*The overall rating may or may not equate to an overall average of each part or of each question.

EVALUATION SUMMARY: TRANSPORTATION

INITIAL REVIEWER RATINGS:	EVALUATION CRITERIA (Each of the six factors are of equal importance)	CHANGES TO RATINGS (if applicable) & REVIEWER'S REASON FOR MAKING THE CHANGE:
	I. The Applicant Organization's Leadership Experience in relation to Aging Services	
	II. Compatibility with AAA4 Program Parameters	
	III. Quality of the Applicant Organization's Service Plan	
	IV. Qualifications of the Applicant's Personnel who would operate the Program	
	V. Adequacy of the Applicant Organization's non-AAA4 Assets and Resources	
	VI. Cost Effectiveness of the Proposed Program	
OVERALL RATING**	**The overall rating may or may not equate to an overall average of each factor.	

Questions, Suggestions, Recommendations, Conditions:

FUNDING RECOMMENDATION TO GOVERNING BOARD:

REVIEWER'S SIGNATURE: _____   DATE(S): _____