



Boulder County Area Agency on Aging

Request for Proposal for Older Adult Services RFP#7127-20

Submittal Instructions

for the OAA-SYS - Request For Proposals System

Submittal Due Date:

October 30, 2020, 2:00 p.m.

The Overall Process

1. Register: Create a profile and log in
2. Create blank proposal
3. Develop a proposal: Fill in the details
4. Check for errors
5. Submit your finished proposal

Step 1: Create Profiles

For you and your agency

Login Page

- Go to:
<https://bouldercountyaaa.oaa-sys.com/rfp/public>
- From **Open Solicitations**, select:
BCAAA Request for Proposal for Older Adult Services
- The screen expands with instructions.



OAA-SYS®
Request For Proposals System

A screenshot of the login interface. At the top, it says "Please Log In". Below that is a section for "Open Solicitations:" with a dropdown menu. The dropdown menu is open, showing "BCAAA Request for Proposal for Older Adult Service" selected. Below the dropdown are input fields for "E-mail" and "Password". At the bottom is a large green "Login" button. A red arrow points from the text "First, select the RFP" to the dropdown menu. A blue arrow points from the "Login" button to the dropdown menu.

First, select the RFP

Login Page, cont'd

- For anyone from your agency to attend the pre-bid conference, that person can register attendance from the login page.

Please Log In

Open Solicitations: BCAAA Request for Propri

E-mail

Password

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If you plan to respond to this solicitation, you must attend the pre-bid conference and training. [Click here to register for this conference](#)
3. If logging in for the first time, [please click here](#)

Login

Required Reading later

Next, you'll create your RFP user account

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Everyone must create a profile...

- One-time setup
First time you log in
- Initial two-part process:
 - One profile for your **AGENCY**
 - Profile for yourself

Please Log In

Open Solicitations: BCAA Request for Propri ▼

E-mail

Password


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Login

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Creating an AGENCY profile

1. Assign a person in your organization to:
 - a. First, create a **user** profile and log in.
 - b. Second, create the profile for your **agency** with basic information:
Legal name, address, and contact information
2. Receive your Agency Registration Code
 - Via email 
 - Initial **user** and **agency** profiles created at the same time
3. Share code with others in the agency –
Those who will be working on the proposal

You have successfully registered your agency for the following Request for Proposals: **BCAAA Request for Proposal for Nutrition Services**

Your assigned Agency Registration Code is

X9X9-XX9XX

Please share this code with the others in your agency that also plan to work on this Request for Proposals. They will need this code to create their login profile.

Creating your PERSONAL profile

1. Get the code.
From your co-worker
2. Go to the login page.
Click “logging in for the first time” link
3. Enter the code.
Agency Already Registered?
If your agency has already registered for this Request for Proposals, enter your agency registration code below to continue
Agency Registration Code Obtain this code from person that created your agency profile Submit
4. Enter your personal info.
5. Review RFP’s **Required Reading**.

Please Log In

Open Solicitations: BCAAA Request for Prop ▾

E-mail

Password

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If you plan to respond to this solicitation, you must attend the pre-bid conference and training. [Click here to register for this conference](#)
3. If logging in for the first time, [please click here](#)

Login

Required Reading

You will sequentially advance through each section in the proposal.

Provides:

- RFP schedule
- Program details
- Provider requirements.

RFP SCHEDULE

RFP Number:	7127-20
RFP Title:	Boulder County Area Agency on Aging Request for Proposals for Older Adult Services
Pre-Proposal Meeting:	September 30, 2020 9:00 a.m. to 11:00 a.m. Webinar – Email: BCAACompliance@bouldercounty.org for registration information
RFP Questions Due:	October 12, 2020 — 2:00 p.m.
Submittal Due Date:	October 30, 2020 — 2:00 p.m.
Email Address:	purchasing@bouldercounty.org
Documents included in this package:	Proposal Instructions Terms and Conditions Specifications Insurance and W-9 Requirements Submittal Checklist Evaluation Criteria Sustainability Questionnaire Signature Page Sample Contract



Required Reading sections

Required Reading for BCAAA Request for Proposal for Older Adult Service

Please review each of the following sections of the required reading.

- RFP SCHEDULE
- PURPOSE/BACKGROUND
- PERIOD OF PERFORMANCE
- TERMS AND CONDITIONS
- SERVICES
- PROPOSAL DESCRIPTION
- FISCAL MANAGEMENT REQUIREMENTS
- FUNDING REQUIREMENTS
- REQUIREMENTS FOR ALL OLDER AMERICANS ACT FUNDED PROGRAMS
- OTHER GRANT REQUIREMENTS
- EQUAL OPPORTUNITY EMPLOYMENT
- NARRATIVE QUESTIONS
- CONTRACTING REQUIREMENTS
- INSURANCE AND W-9 REQUIREMENTS
- SUBMITTAL SECTION
- EVALUATION CRITERIA
- SUSTAINABILITY QUESTIONNAIRE

I have read and understand the information in the required reading sections.

Agree

Beginning with the RFP Schedule:

- Sequence through each section.
- Select final checkbox and click **Agree**.
- Proceed to Agency Home Page.
- Create a new proposal.



AREA AGENCY
ON AGING

Step 2: Create Blank Proposal

A click of the button!

Agency Home Page

To create a new proposal, click the "Create new proposal" button. This will create a blank proposal for you to complete.

Create new proposal

Step 3: Fill in Proposal Details

Where the real work happens

➤ Click **Edit**

Existing Proposals: 1

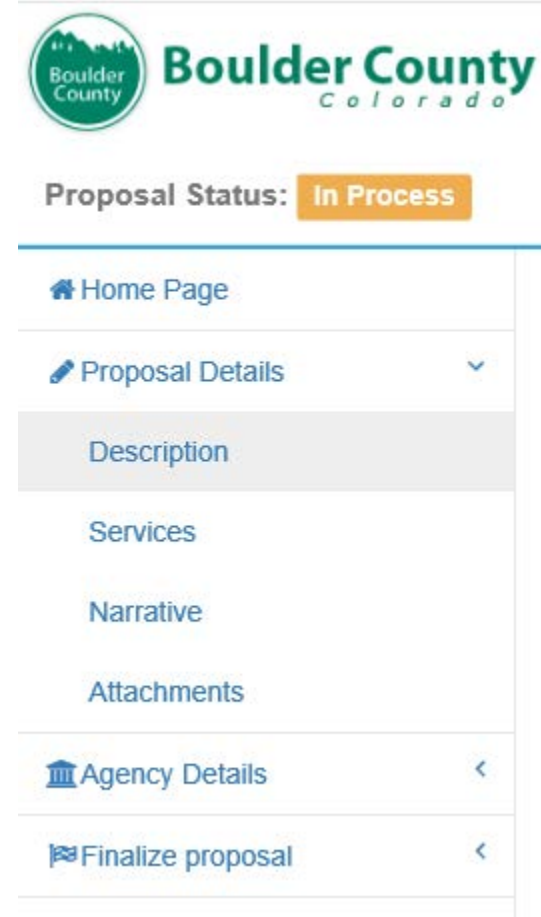
ID	Name	Created By	Status	Download (pdf)	Edit	Delete
3005	NEW BLANK PROPOSAL	Jane Ireland	In Process	 Download	 Edit	 Delete

Proposal Details – Key Tasks

- Complete each section of the proposal.
 - *Who completes what sections varies agency to agency.*
- When finished, attach any required documents to submit with your proposal.

Proposal Details

- Navigation menu
 - Four required **Proposal Details** sections:
 - ✓ Description
 - ✓ Services
 - Units and clients
 - Budgets
 - ✓ Narrative questions
 - ✓ Attachments.
 - When finished with one section, click on the next section in the navigation menu to continue.



Proposal Details – Description

1. Enter **Proposal Title**.
2. Enter **Proposal Description**.
3. Click **Save**.
4. Click **Services** in the navigation menu to continue.

Proposal Description

Proposal Title:

ABC Proposal

×

You have entered 12 characters so far.

Note: You will have an opportunity to provide additional detail for each service under Services in the proposal.

Proposal Description:

This is a test proposal

You have entered 5 words so far.

Save

Proposal Details Services #1

1. Click **Add Service** dropdown. Select service. Click **Add Now**.

Assisted Transportation
Chores
Education
Education - Assistive Technology
Legal Assistance
Material Aid - Assistive Technology
Mental Health Counseling
Screening
Transportation

2. *Required:* Enter estimated **Non-Compensated Service** units:

- Information and Assistance
- Outreach.

3. Click **Save Non-Comp Unit Data**

Proposal Services

Please identify the service(s) you plan to provide. Select the service from the dropdown below and then click the "Add Now" button.

Note that for **any** services added to your proposal, "Information & Assistance", and "Outreach" are required.

- Enter a detailed description of each service you propose to offer through the "Service Details" link
- Enter budgets for each service through the "Budget" link
- Enter Unduplicated client counts and projected service areas and units through the "Units/Clients" link.

Add Service ([View definitions](#))

Add Now

Compensated Services

There are no compensated services in this proposal. Use the drop down menu above to add services.

Non-Compensated Services

Please provide an estimate of the units of service you anticipate for the following non-compensated services

Non-Compensated Service	Estimated Units
Information and Assistance	<input type="text" value="0"/>
Outreach	<input type="text" value="0"/>

Save Non-Comp Unit Data



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Community Services Department

Proposal Details Services #1

- Saved in this example, **Caregiver Respite – Adult Day Care** compensated service displays its own row with links to:
 - **Service Details**
 - **Budget**
 - **Units/Clients.**
- Click Service Details **Edit** and enter a **Detailed Description.**
- Save and return to this screen and click **Edit** below **Budget.**

Proposal Services

Please identify the service(s) you plan to provide. Select the service from the dropdown below and then click the "Add Now" button.

Note that for **any** services added to your proposal, "Information & Assistance", and "Outreach" are required.

- Enter a detailed description of each service you propose to offer through the "Service Details" link
- Enter budgets for each service through the "Budget" link
- Enter Unduplicated client counts and projected service areas and units through the "Units/Clients" link.

Add Service ([View definitions](#)) ▼ Add Now

Compensated Services

Services Found: 1

Service	Requested Funds	Service Details	Budget	Units/Clients	Delete
Caregiver Respite - Adult Day Care	\$0.00	Edit	Edit	Edit	Delete

Proposal Details – Budget #2

- All amounts are for entire first year.
- Total Revenues and budgeted Expenses must match, as in the screenshot.

Click **Next** and enter the **Local Match Type, Source of Funds, and Amount.**

- Calculate requested funds considering 25% required **Local Matching Funds** and other **Fiscal Management Requirements.**
- Click **Next** to add **Other Sources of Revenue. Consumer Contributions, or Program Income,** is an option required by SUA. Estimate this amount. Do not include in revenue total.
- Click **Next** to go to **Personnel Expenses.** **Budget Tracker** displays totals thus far.

Budget - Caregiver Respite - Adult Day Care

Budget Tracker	
Expenses do not match Revenues.	
Grant Revenues:	
Requested Funds:	\$10,000.00
Local Match:	\$3,500.00
Total Revenues:	\$13,500.00
Grant Expenses:	
Personnel:	\$0.00
Program Expenses:	\$0.00
Total Expenses:	\$0.00

Proposal Details – Budget #3

- In **Personnel Expenses**, distribute budgeted one-year expenses between direct and administrative.
- For each **Personnel Type**, select **Employee Type** and enter **Position Title**. Then enter the budgeted hours/hourly rate or salary/percent of time.
- See **Requirements** for descriptions of **Expenses**.
- Work with your budget until expenses are balanced with revenue.
- Click **Next** and then **Done**.

Budget - **Caregiver Respite - Adult Day Care**

Personnel Type	Employee Type	Title	Hourly Rate	Total Hrs	Annual Salary	Percent of time	Cost
Administrative	Salaried	Respite Manager	\$0.00	0	\$28,500.00	20.00 %	\$5,700.00
Direct Services	Hourly	Respite Activities Coordinator	\$15.00	520	\$0.00	0.00 %	\$7,800.00

< Total Personnel: **\$13,500.00** >

Home Back Next

Budget Tracker x

Expenses match revenues.

Grant Revenues:	
Requested Funds:	\$10,000.00
Local Match:	\$3,500.00
Total Revenues:	\$13,500.00
Grant Expenses:	
Personnel:	\$13,500.00
Program Expenses:	\$0.00
Total Expenses:	\$13,500.00



Proposal Details – Units/Clients #3

Back at Proposal Services, click **Edit** under **Units/Clients**.

Click **Add Now** and select one targeted area from **Select Service Area** dropdown list.

Shown in the following screen, Boulder was selected as the service area.

Add units and clients on the next screen, then return here to add more target service areas, if necessary.

Units/Clients - Caregiver Respite - Adult Day Care

Please identify the communities you plan to serve from the drop down below and then add the corresponding units of service and unduplicated clients for this service.

Select Service Area: Add Now

No service areas entered for this service

Back

- Allenspark area
- Boulder
- Erie area
- Lafayette
- Longmont
- Louisville
- Lyons area
- Nederland area
- Niwot area
- Unincorporated Boulder County

Proposal Details – Units/Clients #3

- Enter anticipated **Total Proposed Units of Service** for first year.
- Then enter **Total and Targeted Client Counts** for the year in each category:
 - Total 60+ Persons
 - Low Income
 - Minority
 - Low Income Minority
 - Frail
 - Rural
- Click **Save**

Units/Clients - Caregiver Respite - Adult Day Care

Please identify the communities you plan to serve from the drop down below and then add the corresponding units of service and unduplicated clients for this service.

Select Service Area: ▼ Add Now

Units of Service:

For the service areas you have identified, please enter the units of service you anticipate providing.

Service Area	Total Proposed Units of Service	Delete Service Area
Boulder	<input type="text" value="0"/>	Delete
Total	0	

Total and Targeted Client Counts:

For each of the service areas identified above, please enter the number of unduplicated clients you anticipate serving.

Service Area	Total 60 + Persons	Low Income	Minority	Low Income Minority	Frail	Rural
Boulder	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	0	0	0	0	0	0

Back Save



Proposal Details – Units/Clients #3

- In this example, all 520 **Total Proposed Units of Service** are to be delivered to older adults, 60+.
- Then enter **Total and Targeted Client Counts** for the year in each category:
 - Total 60+ Persons
 - Low Income
 - Minority
 - Low Income Minority
 - Frail
 - Rural.
- Click **Save**
- Click **Narrative** in navigation menu.

Units/Clients - Caregiver Respite - Adult Day Care

Service information updated successfully

Please identify the communities you plan to serve from the drop down below and then add the corresponding units of service and unduplicated clients for this service.

Select Service Area:



Add Now

Units of Service:

For the service areas you have identified, please enter the units of service you anticipate providing.

Service Area	Total Proposed Units of Service	Delete Service Area
Boulder	520	Delete
Total	520	

Total and Targeted Client Counts:

For each of the service areas identified above, please enter the number of unduplicated clients you anticipate serving.

Service Area	Total 60 + Persons	Low Income	Minority	Low Income Minority	Frail	Rural
Boulder	20	0	0	0	0	0
Total	20	0	0	0	0	0

Back

Save



Proposal Details – Narrative

- For your older adult program, answer all required questions in narrative form.
- Remember to save often to prevent loss of data.
- Then, as applicable, answer the additional questions.
- Click **Attachments** in navigation menu.

Proposal Narrative

Please address the questions listed below, limiting each response to approximately 750 words. You do not need to use complete sentences. Lists, bulleted items, etc. are acceptable but please be as specific as possible. Remember to save often. Your session will time out after 20 minutes of inactivity.

Question 1:

If you cannot certify the statements below, please explain in a statement of explanation.

- I am authorized to bid on my company's behalf.
- I am not currently an employee of Boulder County.
- None of my employees or agents is currently an employee of Boulder County.
- I am not related to any Boulder County employee or Elected Official.
- (Sole Proprietorships Only) I am not a Public Employees' Retirement Association (PERA) retiree.

You have entered 0 words so far.

Question 2: [Required]

State your compliance with the Terms and Conditions in the Sample Contract contained in this RFP. Specifically list any deviations and provide justification for each deviation.



Proposal Details – Upload Docs

Click **Add Now** to attach and upload the required document(s).

Valid file types:

- Microsoft Word (.doc or .docx)
- Microsoft Excel (.xls or .xlsx)
- PDF (.pdf)
- JPEG image/scan (.jpg or .jpeg)
- PNG image/scan (.png)

Sustainability Questionnaire is required for all services.

Click **Agency Details** ►
Agency Information

Upload/Attach Documents

Attachment information saved successfully

Submit the following documents along with your proposal. Required documents are flagged so. Include the other documents if they are appropriate for your specific proposal:

1. Sustainability Questionnaire - **REQUIRED**

Select the document to add from the list below to create a blank record of the documents you wish to upload. Then use the "edit" link in the table to describe and upload the document.

NOTE: You can upload multiple copies of the same type of document (for example, if your document is split across multiple files).

Add This Document Type Sustainability Questionnaire ▼ **Add Now**

Documents attached: 1

Document Title	Document Type	Filename	Edit/Reload File	Delete
ABC Sustainability	Sustainability Questionnaire	ABC RFP 7127.docx	Edit	Delete



Proposal Details – Upload Docs

Complete list of required documents:

- Most recent fiscal audit and/or financial statement
- Sustainability plan demonstrating the organizations ability to continue services if this funding is no longer available
- Insurance Certificate
- W-9
- Sustainability Questionnaire
- Addendum Acknowledgement(s) (If Applicable).

Agency Details

Proposal Status: **In Process**

Jane Ireland (Adept Boulder Caregiving) ▾

- Home Page
- Proposal Details <
- Agency Details ▾
- Agency Information**
- Contact Information
- Finalize proposal <

Agency Information

Agency Name

Adept Boulder Caregiving

DBA Name: (If different)

Federal Employer ID Number (FEIN):

299-99-9999

Inception Date:

01/01/2020

Organization Type:

Non-profit ▾

DBE status: (Select all that apply-hold shift key to select multiples)

Woman-owned
Minority-owned

Save



Agency Details

Complete primary contact information and create other contact records.

In navigation menu, click **Finalize Proposal** ►
Validate

Contact Information

Please identify the relevant individuals who will serve as the point of contact for the following roles

- Agency Director/CEO/Executive Director - **REQUIRED**
- Proposal Contact - **REQUIRED**
- Peer Place Data Entry
- Contract Contact
- Program Manager
- Reimbursement Requests
- Other

Add new contact

Step 4: Finalize Proposal – Check for errors

Validate. Submit. Print.

Validation Process

- RFP system reviews proposal for errors.
- First attempt yielded many errors!
- You will not be able to submit until all errors are resolved.

Errors Found: 18
Errors must be resolved before you can submit this proposal.

Description Errors	1
Budget Errors	1
HOMEMAKER:- Revenues and Expenses (\$201.00 v \$2,200.00) must balance.	
Units/Clients Errors	6
Narrative Errors	7
Attachment Errors	0
Agency Details Errors	3

Validation Process

Proposal Status: **Validated**

Jane Ireland (Adept Boulder Caregiving)▼

Home Page

Proposal Details <

Agency Details <

Finalize proposal ▼

Validate

Submit

Print

Proposal Validation

Validation Results

Congratulations! Your request validated successfully and is ready to be submitted.

Overview of the submit process

- All electronic
- Requires that you first request and receive system-generated “Proposal Identification Number” (PIN)
 - System emails the PIN
 - You must have valid emails for two key contacts:
 - CEO/Director of your agency
 - Yourself (as the proposal contact).

Step 5: Submit Finalized Proposal

Submit your proposal

Finalize Proposal – Request a PIN

- Under Submit proposal, click **Request PIN**.
- Complete form and click **Submit**.

Digital Signature
Please enter all of the following information

Name of Signatory

Title

Email

Submit Date

Enter PIN

IMPORTANT NOTE: YOUR PROPOSAL WILL BECOME READ-ONLY AFTER YOU CLICK THE "SUBMIT" BUTTON.



Finalize Proposal – Request a PIN

- Receive PIN by email.
- Return to Submit proposal.
- Click **Submit Proposal**.

Submit proposal

Your proposal is ready to submit.

In order to do so, you must first obtain an electronic Proposal Identification Number (PIN). Request your PIN by clicking on the button below.

Request PIN

- A PIN was emailed to you
- If you do not receive a PIN within 20 minutes, please call Heather Jones at (970) 248-2717
- Note that PINs time out after twenty four (24) hours. You must have an active PIN in order to submit.

Already Have Your PIN?

Submit Proposal



Success!

Confirmation

The following proposal was submitted successfully

RFP/SOQ	BCAAA Request for Proposal for Nutrition Services
Agency	Adept Boulder Caregiving
Proposal	Adept Boulder Congregate Site
Submitted Date	2/11/2020 4:20:01 PM -08:00
Submitted Name	Jane Ireland
Submitted Email Address	janeirelandco@gmail.com
Status	Submitted

