



Boulder County Purchasing
1325 Pearl Street
Boulder, CO 80302
purchasing@bouldercounty.org

SOLICITATION OF QUALIFICATIONS
COVER PAGE

SOQ Number: **7360-22**

SOQ Title: Boulder County Area Agency on Aging
Choices@Home Voucher Program

SOQ Questions Due: July 20, 2022 – 2:00 p.m. MDT

Submittal Due Date: July 27, 2022 – 2:00 p.m. MDT

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
- Signature Page
- Sample Contract



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PROPOSAL INSTRUCTIONS

NOTE: If you were awarded under SOQ #7345-22, you do not need to resubmit proposal for this SOQ.

1. Purpose/Background

BCAAA requests qualifications for licensed providers of in-home personal care and homemaker services for adults age 60 and over who reside in Boulder County. Providers will be considered for participation in the Choices@Home program, a client-directed, reimbursement-based, voucher program. The Choices@Home program is seeking qualified in-home Service Providers who meet the program requirements, demonstrate high quality strength-based service delivery, and a passion to serve those most in need.

The Board of County Commissioners reserves the right to reject any and all responses, to waive any informalities or irregularities therein, and to accept the proposal(s) that, in the opinion of the Board, is in the best interest of the Board and of the County of Boulder, State of Colorado.

Awarded vendors will be expected to enter into a continuing services contract with the county with the option to renew for four more one year terms. No work is guaranteed by an award of a contract.

Specifications and a sample contract are attached.

2. Written Inquiries

All inquiries regarding this SOQ will be submitted via email to the Boulder County Purchasing Office at purchasing@bouldercounty.org on or before 2:00 p.m. **July 20, 2022**. A

response from the county to all inquiries will be posted and sent via email no later than **July 22, 2022**.

Do not contact any other county department or personnel with questions or for information regarding this solicitation.

3. Submittal Instructions

Submittals are due at the email box only, listed below, for time and date recording on or before **2:00 p.m. Mountain Time on July 27, 2022**. **Vendors must answer whether line-item pricing information submitted with a bid is confidential or closely held.**

Please note that email responses to this solicitation are limited to a maximum of 50MB capacity.

NO ZIP FILES OR LINKS TO EXTERNAL SITES WILL BE ACCEPTED. THIS INCLUDES GOOGLE DOCS AND SIMILAR SITES. ALL SUBMITTALS MUST BE RECEIVED AS AN ATTACHMENT (E.G. PDF, WORD, EXCEL).

Electronic Submittals must be received in the email box listed below. Submittals sent to any other box will NOT be forwarded or accepted. This email box is only accessed on the due date of your questions or proposals. Please use the Delivery Receipt option to verify receipt of your email. It is the sole responsibility of the proposer to ensure their documents are received before the deadline specified above. Boulder County does not accept responsibility under any circumstance for delayed or failed email or mailed submittals.

Email purchasing@bouldercounty.org; identified as SOQ # 7360-22 in the subject line.

All SOQs must be received and time and date recorded by authorized county staff by the above due date and time. Sole responsibility rests with the proposer to see that their SOQ response is received on time at the stated location(s). Any responses received after due date and time will be returned to the proposer.

The Board of County Commissioners reserves the right to reject any and all responses, to waive any informalities or irregularities therein, and to accept the proposal that, in the opinion of the Board, is in the best interest of the Board and of the County of Boulder, State of Colorado.

Contractors and their employees, subcontractors, and agents must comply with all federal, state, and local laws, regulations, ordinances, orders, and codes, as well as Boulder County policies, guidelines, and protocols.

Americans with Disabilities Act (ADA): If you need special services provided for under the Americans with Disabilities Act, contact the ADA Coordinator or the Human Resources office at (303) 441-3525 at least 48 hours before the scheduled event.



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TERMS AND CONDITIONS

1. Proposers are expected to examine the drawing, specifications, schedule of delivery, and all instructions. Failure to do so will be at the proposer's risk.
2. Each proposer will furnish the information required in the Request for Proposals.
3. The Contract/Purchase Order will be awarded to that responsible proposer whose submittal, conforming to the Request for Proposals, will be most advantageous to the County of Boulder, price and other factors considered.
4. The County of Boulder reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received, and to accept any portion of or all items proposed if deemed in the best interest of the County of Boulder to do so.
5. No submittal will be withdrawn for a period of thirty (30) days subsequent to the opening of proposals without the consent of the County Purchasing Agent or delegated representative.
6. A signed purchase order or contract furnished to the successful proposer results in a binding contract without further action by either party.
7. Late or unsigned proposals will not be accepted or considered. It is the responsibility of proposers to ensure that the proposal arrives at the Purchasing email address prior to the time indicated in the "Request for Proposals."
8. The proposed price will be exclusive of any Federal or State taxes from which the County of Boulder is exempt by law.
9. Any interpretation, correction or change of the SOQ documents will be made by Addendum. Interpretations, corrections and changes of the SOQ documents made in any other manner will not be binding, and proposer will not rely upon such interpretations, corrections and changes. The County's Representative will not be responsible for oral

clarification.

10. Confidential/Proprietary Information: Bids submitted in response to this “Invitation to Bid” and any resulting contract are subject to the provisions of the Colorado Open Records Act, 24-72-201 et seq., C.R.S., as amended. Any restrictions on the use or inspection of material contained within the bid or resulting contract should be clearly stated in the bid and contract itself. Confidential/proprietary information should be readily identified, marked and/or separated from the rest of the bid. Co-mingling of confidential/proprietary and other information is NOT acceptable. Vendors must answer whether line-item pricing information submitted with a bid is confidential or closely held. Bids that do not identify confidential/proprietary information may be released in their entirety. Pricing totals contained in a bid are not considered confidential.

The Boulder County Attorney’s Office retains sole authority for determining whether the Colorado Open Records Act requires or permits Boulder County to disclose proposal or bid documents, or any information contained therein, pursuant to an open records request.

11. Boulder County promotes the purchase/leasing of energy efficient materials and products with low toxicity levels when availability, quality and budget constraints allow. Proposers are expected whenever possible to provide products that earn the ENERGY STAR and meet the ENERGY STAR specifications for energy efficiency with power management features enabled. Proposers are encouraged to offer products and equipment with post-consumer recycled-content materials. Products should be packaged and delivered with a minimum amount of recycled packaging that adequately protects the product but is not excessive.
12. Pursuant to Colorado law (House Bill 1292), in any bidding process for public works in which a bid is received from a non-resident bidder who is from a state that provides a percentage bidding preference, a comparable percentage disadvantage shall be applied to the bid of that bidder. Bidders may obtain additional information from the Department of Personnel’s website: <http://www.colorado.gov/dpa/>.



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SPECIFICATIONS

BACKGROUND

Choices@Home is an Older Americans Act grant funded voucher program. It provides Homemaker and Personal Care services to eligible Boulder County residents who are 60 and older. Eligible clients are assessed and referred for services through the program by trained Resource Specialists at entry points throughout Boulder County: BCAA Community Living, City of Boulder Older Adult Services, Longmont Senior Services, and Boulder County Housing Authority.

Eligibility for Choices@Home, as defined by the [Colorado Department of Human Services State Unit on Aging Policies and Procedures](#), is as follows:

Homemaker-

- Eligibility for homemaker services is restricted to those persons who:
 - Are unable to perform at least two Instrumental Activities of Daily Living (IADL) without substantial human assistance, including verbal reminding, physical cueing, or supervision; or
 - 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 (Section 102.a.22 of the Older Americans Act of 1965 as amended 2006).
- Instrumental Activities of Daily Living (IADL) shall include:
 - Meal Preparation
 - Housework
 - Laundry
 - Shopping
 - Medication Management
 - Appointment management
 - Money management
 - Access resources/Transportation; and
 - Telephone

Personal Care-

- Eligibility for in-home services is restricted to those persons who fit the definition of “frail” within the Older Americans Act (OAA):
 - The term “frail” means, with respect to an older adult in a state, that the older adult is determined to be functionally impaired because the individual:
 - Is unable to perform at least two Activities of Daily Living without substantial human assistance, including verbal reminding, physical cueing, or supervision; or,
 - 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 (Section 102.a.22 of the Older Americans Act of 1965 as amended 2006).
 - For purposes of determining eligibility, Activities of Daily Living (ADL) shall include:
 - Mobility;
 - Bathing;
 - Transfers;
 - Dressing;
 - Bladder care;
 - Eating;
 - Bowel care; and
 - Hygiene

Eligible clients choose from a list of contracted providers. Contracted providers are recruited through purchasing events such as this SOQ. Additional providers actualize client choice and program flexibility by expanding service capacity and geographic service areas.

SERVICE DESCRIPTION & REIMBURSEMENT

Homemaker: Provide assistance with tasks essential to maintaining a household, such as preparing meals, laundry, shopping, managing money, and housekeeping.

1 unit of service = 1 hour

Urban - \$30/hour

Rural - \$45/hour

Personal Care: Provide assistance with bathing, dressing, eating, toileting, transferring in and out of bed or chair, walking and other daily activities.

1 unit of service = 1 hour

Urban - \$30/hour

Rural - \$/hour

Zip codes that qualify for Rural rates: **80025, 80455, 80466, 80471, 80481, 80510, 80540.**

PROGRAM REQUIREMENTS

The voucher program is paid for with both federal (Older Americans Act) and state (State Funds for Senior Services) funds. As a result, there are several programmatic requirements that your organization must meet in order to qualify as a provider in the voucher program.

Training and Supervisory Requirements: Provider shall document that all homemakers have received a minimum of eight (8) hours of training or have passed a skills validation test conducted by the provider prior to delivery of services in the provision of homemaker services.

Staff rendering personal care services to older adults shall receive at least twenty (20) hours of training related to performing personal care tasks or pass a skills validation test before providing the service.

Supervisory visits in the presence of at least one care provider shall be conducted at least every six (6) months for those receiving homemaker or personal care services.

Background Checks: Provider must ensure that criminal background checks are conducted for all employees, volunteers, and contractors who have direct contact with participants.

CAPS Checks: Provider must demonstrate that they have or are willing to develop a CAPS check policy, as required by State law.

On-Site Program Assessment: Provider must agree to cooperate with and provide records to BCAAA as requested and participate in an onsite assessment within one year of contracting.

Duplication: Provider must agree not to use funds to duplicate services that may be funded through Medicaid, Medicare, Title XX, or other available federal, state, or local sources.

Assurance of Compliance: The Provider must assure that the organization and relevant staff will comply with all applicable federal, state, and local fire, health, safety, sanitation and other standards prescribed in law or regulations.

Protect Client Confidentiality and HIPPA Compliance: Provider must agree to maintain the confidentiality of protected health information, including the consumer's personal identification information, and ensure that no information about an eligible consumer is disclosed to parties other than BCAAA without the informed written consent of the consumer or his or her legal representative. As a part of the contract, the provider must sign a Business Associates Agreement with the BCAAA.

Invoice and Payment: Agencies that participate in the voucher program will be reimbursed monthly for services rendered. Reimbursement requests must be submitted by the 15th of the month following service delivery through the online voucher management portal.

QUALIFYING QUESTIONS

Qualifying Questions	Response
Are you a current Choices@Home provider?	Yes or No
What type of license does your organization operate under?	Class A or B
Are employees licensed, insured, and bonded? Please provide details.	Yes or No Provide details
What is the male/female ratio of your caregiving staff?	Provide details
Do you have any bilingual staff members? If so, what languages do they speak?	Yes or No Provide details
Are there geographic limitations to your service? If so, please describe your service area.	Yes or No Provide details
If you serve the mountain communities of Boulder County, do you have staff and capacity to provide services now?	Yes or No Provide details
Is your organization Medicaid/Medicare Certified?	Yes or No
Can you ensure that all caregivers delivering services for the voucher program are background checked?	Yes or No
Can you ensure that caregivers serving at-risk older adults under this contract have had a CAPS background check?	Yes or No
What is your policy regarding disclosure of consumer's rights to participants?	Provide details
What is your policy if a care provider is unable to keep an appointment?	Provide details
How many additional clients can your organization currently take on?	Provide details
How would the organization handle a substantial increase of clients over and above projected capacity estimates?	Provide details
Does your organization meet the Training and Supervisory Requirements of the voucher program (listed below)?	
<ul style="list-style-type: none"> That all homemakers have received a minimum of eight (8) hours of training or have passed a skills validation test conducted by the provider prior to delivery of services in the provision of homemaker services. 	Yes or No
<ul style="list-style-type: none"> Staff rendering personal care services to older adults shall receive at least twenty (20) hours of training related to performing personal care tasks or pass a skills validation test before providing the service. 	Yes or No
<ul style="list-style-type: none"> Supervisory visits in the presence of at least one care provider shall be conducted at least every six (6) months for those receiving homemaker and personal care services. 	Yes or No
Do you currently offer a sliding scale or discount for low-income,	Yes or No

private pay clients?	
If selected as a provider for the Choices@Home program, would you be willing to extend the program rates to Choices clients if they elect to purchase additional private pay hours?	Yes or No
Do you have a minimum hours per visit?	Provide details



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INSURANCE AND W-9 REQUIREMENTS

INSURANCE REQUIREMENTS

Commercial General Liability

This coverage should be provided on an Occurrence Form, ISO CG001 or equivalent, with Minimum limits of \$1,000,000 Each Occurrence, \$2,000,000 General Aggregate and \$2,000,000 Products Completed Operations Aggregate.

Automobile Liability

Bodily Injury and Property Damage for any owned, hired, and non-owned vehicles used in the performance of the Contract. Minimum limits \$1,000,000 Each Accident.

Workers' Compensation and Employer's Liability

Workers' Compensation must be maintained with the statutory limits. Employer's Liability is required for minimum limits of \$100,000 Each Accident/\$500,000 Disease-Policy Limit/\$100,000 Disease-Each Employee.

Professional Liability (Errors and Omissions)

Professional liability coverage with minimum limits of \$1,000,000 Per Loss and \$1,000,000 Aggregate. Professional Liability provisions indemnifying for loss and expense resulting from errors, omission, mistakes or malpractice is acceptable and may be written on a claims-made basis. The contractor warrants that any retroactive date under the policy shall precede the effective date of this Contract; and that either continuous coverage will be maintained or an extended discovery period will be exercised for a period of two (2) years beginning at the time work under this Contract is completed.

Third Party Commercial Crime Insurance / Third Party Fidelity Bond

The Crime limit shall be \$5,000 Per Loss and include an endorsement for "Employee Theft of Client Property". In order to provide coverage to County during the course of this contract, Commercial Crime policies must be endorsed to cover Third Party Fidelity. Third party fidelity covers the vendor's employees when engaged in work for a client. In addition, the County will be listed as loss payee on the commercial crime coverage. This third-party coverage can also be provided by obtaining a third-party fidelity bond.

Sexual Abuse and Molestation Coverage

As a provider of a service which has contact with individuals that are part of a sensitive population and are in a position of trust the following minimum insurance limits are required:

- Contractors with 1-2 County Clients: \$25,000
- Contractors with 3-4 County Clients: \$50,000
- Contractors with 5 or fewer County clients: \$100,000
- Contractors with 6-10 County clients: \$250,000
- Contractors with 11-15 County clients: \$500,000
- Contractors with 16 or more County clients: \$1,000,000

If the number of clients increases during the contract period, the required coverage limit will increase to correspond accordingly.

Privacy / Cyber Liability Insurance

As a provider of a service which may require the knowledge and retention of personal identifiable information including but not limited to, names, dates of birth, social security numbers, usernames, and passwords, and/or HIPAA sensitive personal information of clients served, the following minimum insurance limits are required:

- Contractors with 10 or fewer County clients: \$50,000
- Contractors with 11 – 15 County clients: \$500,000
- Contractors with more than 25 County clients: \$1,000,000

Boulder County as Additional Insured: Boulder County shall be named as an additional insured for General Liability, Umbrella/Excess Liability, and Pollution Liability, as designated in this Contract. Additional insured shall be endorsed to the policy.

THE ADDITIONAL INSURED WORDING SHOULD BE AS FOLLOWS: *County of Boulder, State of Colorado, a body corporate and politic, is named as Additional Insureds.*

***In regards to General Liability, Umbrella/Excess Liability, and Pollution Liability:**

If any or all of these coverages are required above, additional insured status will be required at the time a contract is executed.

Note that the above insurance amounts are the minimum required for this project. Proof of current insurance must be provided with your proposal in the form of a sample certificate. You are NOT required to include additional insured status until the time a contract is executed.

If you require a waiver of insurance requirements you may request one in your response with an explanation.

W-9 REQUIREMENT

Provide a copy of your business's W-9 with your proposal.



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SUBMITTAL SECTION

The proposer’s attention is especially called to the items listed below, which must be submitted in full as part of the PROPOSAL. Failure to submit any of the documents listed below as a part of your PROPOSAL, or failure to acknowledge any addendum in writing with your PROPOSAL, or submitting a proposal on any condition, limitation or provision not officially invited in this Solicitation of Qualifications (SOQ) may be cause for rejection of the PROPOSAL.

THIS CHECKLIST MUST BE SUBMITTED AS PART OF YOUR PROPOSAL PACKAGE: Proposer will check each box indicating compliance:

INCLUDED	ITEM
	Name and Address of the Partners and Subcontractors if applicable
	A detailed project schedule with an all-inclusive total cost
	Information on the relevant experience of key personnel
	State your compliance with the Terms and Conditions in the Sample Contract contained in this SOQ. Specifically list any deviations and provide justification for each deviation.
	Submit three references for similar projects your company has completed within the last three years and contact information
	Insurance Certificate
	W-9
	Signature Page
	Addendum Acknowledgement(s) (If Applicable)

THIS QUESTION MUST BE ANSWERED AS PART OF YOUR BID PACKAGE: Proposer will answer Yes or No indicating compliance:

YES OR NO	ITEM
	Do you customarily keep line-item pricing information, such as the information being submitted with this proposal, confidential or closely-held?



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EVALUATION CRITERIA

The proposals will be reviewed by a selection committee. The committee may request additional information from vendors or request interviews with one or more vendors. Final evaluation and selection may be based on, but not limited to, any or all of the following:

- Previous provider for Choices@Home
- 10+ new client capacity
- Non-profit
- Mountain Communities served
- Medicaid/Medicare certified
- Bilingual caregivers

A scoring matrix with the order and priority of criteria to be used by the county in its evaluation and selection process is shown below:

Description	Points
Previous provider for Choices@Home	5
10+ new client capacity	5
Non-profit	5
Mountain Communities served	10
Medicaid/Medicare certified	10
Bilingual caregivers	5
Total Possible	40



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SIGNATURE PAGE

Contact Information	Response
Company Name including DBA	
List Type of Organization (Corporation, Partnership, etc.)	
Name, Title and Email Address of Person Authorized to Contract with Boulder County	
Company Address	
Company Phone Number	
Company Website	

By signing below I certify that:

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.

**Signature of Person Authorized to Bid on
 Company's Behalf**

Date

Note: If you cannot certify the above statements, please explain in a statement of explanation.

BOULDER COUNTY SAMPLE CONTRACT

THIS CONTRACT ("Contract") is entered into by and between the Board of County Commissioners on behalf of the County of Boulder, State of Colorado, a body corporate and politic, for the benefit of the [Department] ("County") and [Supplier] ("Contractor"). County and Contractor are each a "Party," and collectively the "Parties."

In consideration of the mutual covenants contained in this Contract, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

1. Incorporation into Contract: The **Details Summary** is incorporated into this Contract. The **Contract Documents** are incorporated into this Contract by reference, except to the extent that the Proposal, if any is incorporated, contains any obligations placed upon County and not otherwise contained in this Contract.
2. Work to be Performed: Contractor will provide all labor and equipment and do all tasks necessary and incidental to performing the work as described in the **Details Summary** and **Contract Documents** (the "Work"). Contractor will perform the Work (a) in a good and workmanlike manner, (b) at its own cost and expense, (c) in accordance with recognized industry standards of care, skill and diligence for the type of work being performed, and (d) in strict accordance with the Contract.
3. Term of Contract: The **Contract Term** begins on the **Start Date** and expires on the **Expiration Date**, unless terminated sooner. All the Work must be performed during the **Contract Term**.
4. Payment for Work Performed: In consideration of the Work performed by Contractor, and subject to conditions contained in this Contract, County will pay an amount not to exceed the **Contract Amount** to Contractor in accordance with the **Contract Documents**.
5. Invoicing: Contractor will promptly provide a copy of its Form W-9 and invoice template to County upon request. Contractor must submit an invoice to the County by the fifteenth (15th) day of the month for completion of any Work performed in the prior calendar month. All invoices submitted require the following components: Contractor's name and address (submitted W-9 address must match remit address), detailed description of services, dates of services, itemization of labor and materials costs, "Bill to: Boulder County" language, payment remittance address, payer, name and address, date of invoice, unique invoice number, and total amount due. Contractor must send all completed invoices to the **Invoice Contact** in the **Details Summary**. County may require delivery of invoices by email. Failure to submit invoices in a timely manner and in accordance with the terms of this Contract may cause a delay in payment. County may recoup any damages incurred because of Contractor's failure to submit invoices pursuant to the terms of this paragraph. County's acceptance or payment of an invoice will not constitute acceptance of any Work performed under this Contract.
6. Extra Time to Complete the Work (Additional Time only): If Contractor cannot complete the Work by the **Expiration Date**, Contractor may request extra time to complete the Work. County, in its sole discretion, may grant Contractor additional time to complete the Work by sending a written notice of extension to Contractor. An extension of time to complete the Work does not entitle Contractor to additional compensation from County.
7. Extension of Contract Term (Additional Time and Work): Upon mutual agreement of the Parties, this Contract may be extended until the **Final End Date**. During any extended **Contract Term**, the terms of this Contract will remain in full force and effect, unless otherwise amended in writing by the Parties. Where the Contractor will provide additional services for additional compensation beyond the initial **Contract Amount**, the Parties must execute a written amendment before the then-current **Expiration Date**. If necessary, the written amendment will incorporate an updated Scope of Work and updated Fee Schedule as exhibits. Contractor must provide a current Certificate of Insurance to the County that complies with the **Insurance Requirements** of this Contract, if any, prior to any extended **Contract Term**.

8. **Schedule of Work:** County may designate the hours (on a daily or weekly basis) during which Contractor may perform the Work, strictly for the purposes of minimizing inconvenience to the County and interference with County operations. Contractor will otherwise set its own work schedule.

9. **Indemnity:** Contractor will be liable for any damages to persons or property caused by or arising out of the actions, obligations, or omissions of Contractor, its employees, agents, representatives or other persons acting under Contractor's direction or control in performing or failing to perform the Work under this Contract. Contractor will indemnify and hold harmless County, its elected officials and appointed department heads, and its employees, agents and representatives (the "indemnified parties"), from any and all liability, claims, demands, actions, damages, losses, judgments, costs or expenses, including attorneys' fees, which may be made or brought or which may result against any of the indemnified parties as a result or on account of the actions or omissions of Contractor, its employees, agents or representatives, or other persons acting under Contractor's direction or control. This indemnification obligation will extend to claims based on Contractor's unauthorized use or disclosure of confidential information and intellectual property infringement. County will not be obligated to indemnify or defend Contractor under any circumstances. Contractor's obligations under this provision shall survive expiration or termination of this Contract. Nothing contained in this Contract or the **Contract Documents** is intended to limit or restrict the indemnification rights or obligations of any Party under this provision, or damages available for breaches of the obligations herein.

10. **Nondiscrimination:** Contractor will comply with the Colorado Anti-Discrimination Act, C.R.S. § 24-34-401, et seq., as amended, and all applicable local, State and Federal laws concerning discrimination and unfair employment practices. County prohibits unlawful discrimination on the basis of race, color, religion, gender, gender identity, national origin, age 40 and over, disability, socio-economic status, sexual orientation, genetic information, or any other status protected by applicable Federal, State or local law. Contractor must require that its subcontractors, if any, similarly comply with all applicable laws concerning discrimination and unfair employment practices.

11. **Information and Reports:** Contractor will provide to authorized County, State, and Federal government representatives all information and reports that may be required for any purpose authorized by law. Contractor will permit access to such representatives to Contractor's facilities, books, records, accounts, and any other relevant sources of information. Where information required by a representative is in the exclusive possession of a person or entity other than Contractor, Contractor must so certify to the County and explain what efforts it has made to obtain the information.

12. **Independent Contractor:** Contractor is an independent contractor for all purposes in performing the Work. **None of Contractor, its agents, personnel or subcontractors are employees of the County for any purpose, including the Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the Colorado Workers' Compensation Act, the Colorado Unemployment Insurance Act, and the Public Employees Retirement Association. Accordingly, County will not withhold or pay any income tax, payroll tax, or retirement contribution of any kind on behalf of Contractor or Contractor's employees. As an independent contractor, Contractor is responsible for employing and directing such personnel and agents as it requires to perform the Work. Contractor will exercise complete authority over its personnel and agents and will be fully responsible for their actions.**

13. **Termination**

a. **Breach:** Either Party's failure to perform any of its material obligations under this Contract, in whole or in part or in a timely or satisfactory manner, will be a breach. The institution of proceedings under any bankruptcy, insolvency, reorganization or similar law, by or against Contractor, or the appointment of a receiver or similar officer for Contractor or any of its property, which is not vacated or fully stayed within thirty (30) days after the institution of such proceeding, will also constitute a breach. In the event of a breach, the non-breaching Party may provide written notice of the breach to the other Party. If the breaching Party does not cure the breach, at its sole expense, as reasonably determined by the non-breaching Party in its sole discretion, within thirty (30) days after delivery of notice, the non-breaching Party may exercise any of its remedies provided under this Contract or at law, including immediate termination of this Contract.

b. **Non-Appropriation:** The other provisions of this Contract notwithstanding, County is prohibited by law from making commitments beyond the current fiscal year. Payment to Contractor beyond the current fiscal year is contingent on the appropriation and continuing availability of funding in any subsequent year. County has reason

to believe that sufficient funds will be available for the full **Contract Term**. Where, however, funds are not allocated for any fiscal period beyond the current fiscal year, County may terminate this Contract without penalty by providing seven (7) days' written notice to Contractor.

c. Convenience: In addition to any other right to terminate under this Section 13, County may terminate this Contract, in whole or in part, for any or no reason, upon seven (7) days' advance written notice to Contractor.

14. Contractor Obligations upon Termination or Expiration: By the **Expiration Date** or effective date of termination, if earlier, Contractor must (1) remove from County property all of its personnel, equipment, supplies, trash and any hazards created by Contractor, (2) protect any serviceable materials belonging to the County, and (3) take any other action necessary to leave a safe and healthful worksite. Any items remaining on County property after the Expiration Date or the effective date of termination, if earlier, will be deemed abandoned by Contractor.

15. Payable Costs in Event of Early Termination: If County terminates this Contract before the **Expiration Date**, Contractor's payments (and any damages associated with any lawsuit brought by Contractor) are limited to only (1) payment for Work satisfactorily executed and fully and finally completed, as determined by County in its sole discretion, prior to delivery of the notice to terminate, and (2) the reasonable and actual costs Contractor incurred in connection with performing the Work prior to delivery of the notice to terminate. Contractor explicitly waives all claims it may have against the County for any other compensation, such as anticipatory profits or any other consequential, special, incidental, punitive or indirect damages.

16. Remedies for Non-Performance: If Contractor fails to perform any of its obligations under this Contract, County may, at its sole discretion, exercise one or more of the following remedies (in addition to any other remedies provided by law or in this Contract), which shall survive expiration or termination of this Contract:

a. Suspend Performance: County may require that Contractor suspend performance of all or any portion of the Work pending necessary corrective action specified by the County and without entitling Contractor to an increase in compensation or extension of the performance schedule. Contractor must promptly stop performance and incurring costs upon delivery of a notice of suspension by the County.

b. Withhold Payment Pending Corrections: County may permit Contractor to correct any rejected Work at the County's discretion. Upon County's request, Contractor must correct rejected work at Contractor's sole expense within the time frame established by the County. Upon full and final completion of the corrections satisfactory to the County, County will remit payment to Contractor.

c. Deny Payment: County may deny payment for any Work that does not comply with the requirements of the Contract or that Contractor otherwise fails to provide or fully and finally complete, as determined by the County in its sole discretion. Upon County request, Contractor will promptly refund any amounts prepaid by the County with respect to such non-compliant Work.

d. Removal: Upon County's request, Contractor will remove any of its employees or agents from performance of the Work, if County, in its sole discretion, deems any such person to be incompetent, careless, unsuitable, or otherwise unacceptable.

17. Binding Arbitration Prohibited: County does not agree to binding arbitration by any extra-judicial body or person.

18. Conflicts of Interest: Contractor may not engage in any business or personal activities or practices or maintain any relationships that conflict in any way with the full performance of Contractor's obligations.

19. Notices: All notices provided under this Contract must be in writing and sent by Certified U.S. Mail (Return Receipt Requested), electronic mail, or hand-delivery to the other Party's **Contact** at the address specified in the **Details Summary**. For certified mailings, notice periods will begin to run on the day after the postmarked date of mailing. For electronic mail or hand-delivery, notice periods will begin to run on the date of delivery.

20. Statutory Requirements: This Contract is subject to all statutory requirements that are or may become applicable to counties or political subdivisions of the State of Colorado generally, including but not limited to: C.R.S. § 38-26-107, which requires withholding funds where the County receives a claim for payment from a supplier or subcontractor of Contractor upon notice of final settlement (required for public works contracts that exceed \$150,000); C.R.S. § 8-17-101 et seq.; C.R.S. § 18-8-301, et seq.; and C.R.S. § 18-8-401, et seq.

21. Public Contracts for Services (C.R.S. §§ 8-17.5-101, et seq.): *The phrase “unauthorized worker” as used in this provision shall have the same and intended meaning as “illegal alien” as such phrase is used in C.R.S. §§ 8-17.5-101, et seq.* Contractor hereby certifies, warrants, and agrees that it does not knowingly employ or contract with an unauthorized worker who will perform work under this Contract and further certifies that it will confirm the employment eligibility of all employees who are newly hired for employment to perform work under this Contract by participating in the E-Verify Program established under Pub. L. 104-28 or the department verification program established under C.R.S. § 8-17.5-102(5)(c). Contractor (i) shall not knowingly employ or contract with an unauthorized worker to perform work under this Contract; (ii) shall not enter into a contract with a subcontractor that fails to certify to the contractor that the subcontractor shall not knowingly employ or contract with an unauthorized worker to perform work under this Contract; (iii) has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this Contract through participation in the E-Verify program or department program; (iv) is prohibited from using either the E-Verify program or department program procedures to undertake preemployment screening of job applicants while this Contract is being performed; and (v) shall comply with any reasonable request by the department made in the course of an investigation that the Colorado Department of Labor and Employment is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5). If Contractor obtains actual knowledge that a subcontractor performing work under this Contract knowingly employs or contracts with an unauthorized worker, Contractor shall (a) notify the subcontractor and County within three (3) days that Contractor has actual knowledge that subcontractor is employing or contracting with an unauthorized worker; and (b) terminate the subcontract if, within three (3) days of receiving notice hereunder, subcontractor does not stop employing or contracting with the unauthorized worker; except that Contractor shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an unauthorized worker. Contractor’s violation of this provision will constitute a material breach of this Contract, entitling the County to terminate the contract for breach. If this Contract is so terminated, Contractor shall be liable for actual and consequential damages to the County.

22. Entire Agreement/Binding Effect/Amendments: This Contract represents the complete agreement between the Parties and is fully binding upon them and their successors, heirs, and assigns, if any. This Contract terminates any prior agreements, whether written or oral in whole or in part, between the Parties relating to the Work. This Contract may be amended only by a written agreement signed by both Parties.

23. Assignment/Subcontractors: This Contract may not be assigned or subcontracted by Contractor without the prior written consent of the County. If Contractor subcontracts any of its obligations under this Contract, Contractor will remain liable to the County for those obligations and will also be responsible for subcontractor’s performance under, and compliance with, this Contract.

24. Governing Law/Venue: The laws of the State of Colorado govern the construction, interpretation, performance, and enforcement of this Contract. Any claim relating to this Contract or breach thereof may only be brought exclusively in the Courts of the 20th Judicial District of the State of Colorado and the applicable Colorado Appellate Courts.

25. Breach: The failure of either Party to exercise any of its rights under this Contract will not be deemed to be a waiver of such rights or a waiver of any breach of the Contract. All remedies available to a Party in this Contract are cumulative and in addition to every other remedy provided by law.

26. Severability: If any provision of this Contract becomes inoperable for any reason but the fundamental terms and conditions continue to be legal and enforceable, then the remainder of the Contract will continue to be operative and binding on the Parties.

27. Third-Party Beneficiary: Enforcement of the terms and conditions and all rights and obligations of this Contract are reserved to the Parties. Any other person receiving services or benefits under this Contract is an

incidental beneficiary only and has no rights under this Contract. Notwithstanding, where the beneficiary **Department** is led by an Elected Official, such Elected Official shall be considered a third-party beneficiary.

28. Colorado Open Records Act: County may disclose any records that are subject to public release under the Colorado Open Records Act, C.R.S. § 24-72-200.1, et seq.

29. Conflict of Provisions: If there is any conflict between the terms of the main body of this Contract and the terms of any of the **Contract Documents**, the terms of the main body of the Contract will control.

30. Governmental Immunity: Nothing in this Contract shall be construed in any way to be a waiver of the County's immunity protection under the Colorado Governmental Immunity Act, C.R.S. § 24-10-101, et seq., as amended.

31. Representations and Warranties: Contractor represents and warrants the following:

- a. Execution of this Contract and performance thereof is within Contractor's duly authorized powers;
- b. The individual executing this Contract is authorized to do so by Contractor;
- c. Contractor is authorized to do business in the State of Colorado and is properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over the Work and the Contractor; and
- d. Contractor and its subcontractors, if any, are financially solvent, able to pay all debts as they mature, and have sufficient working capital to complete the Work and perform all obligations under the Contract.

32. Legal Compliance: Contractor assumes full responsibility for obtaining and maintaining any permits and licenses required to perform the Work. Contractor is solely responsible for ensuring that its performance under this Contract and the Work itself will comply with all Federal, State, and local laws, regulations, ordinances and codes. County approval of the Work or any aspect of Contractor's performance, such as plans, designs, or other Contractor-drafted documents, shall not be interpreted to mean that Contractor has satisfied its obligations under this Section.

33. Litigation Reporting: Contractor is not currently involved in any action before a court or other administrative decision-making body that could affect Contractor's ability to perform the Work. Contractor will promptly notify the County if Contractor is served with a pleading or other document in connection with any such action.

34. Tax Exemption: County is exempt from payment of Federal, State, and local government taxes. Contractor shall collect no tax from the County, and the County shall not be liable to pay any taxes imposed on Contractor. County shall provide its tax exemption status information to Contractor upon request.

35. Delegation of Authority: The Parties acknowledge that the Board of County Commissioners has delegated authority to the Department Head or Elected Official that leads the beneficiary **Department** and their designees to act on behalf of the County under the terms of this Contract, including but not limited to the authority to terminate this Contract.

36. Ownership of Work Product: All work product, property, data, documentation, information or materials conceived, discovered, developed or created by Contractor pursuant to this Contract ("Work Product") will be owned exclusively by the County. To the extent possible, any Work Product will be deemed to be a work made for hire. Contractor unconditionally and irrevocably transfers and assigns to the County all right, title and interest in and to any Work Product.

37. Publicity Releases: Contractor will not refer to this Contract or the County in commercial advertising without prior written consent of the County. This provision shall survive expiration or termination of this Contract.

38. Execution by Counterparts; Electronic Signatures: This Contract may be executed in multiple counterparts, each of which will be deemed an original, but all of which will constitute one agreement. The Parties approve the use of electronic signatures, governed by the Uniform Electronic Transactions Act, C.R.S. §§ 24 71.3 101 to 121. The Parties will not deny the legal effect or enforceability of this Contract solely because it is in electronic form or because an electronic record was used in its creation. The Parties will not object to the admissibility of this Contract in the form of electronic record, or paper copy of an electronic document, or paper copy of a document bearing an electronic signature, because it is not in its original form or is not an original.

39. Limitation on Public Statements and Lobbying Activity. During the term of this Contract, Contractor may receive from the County its confidential data, work product, or other privileged or confidential information that is protected by law. To maintain the fact and appearance of absolute objectivity, Contractor shall not, without the prior written consent of the County, which shall not be unreasonably withheld, do any of the following: (a) disclose information obtained because of this contractual relationship to any third party; (b) lobby any State or Federal agency on any pending matter while this Contract is effective; or (c) make any public statements or appear at any time to give testimony at any public meeting on the subject matters regarding which Contractor is or was retained by the County. County may set reasonable conditions on any disclosure authorized by the County under this provision. Notwithstanding, Contractor may make disclosures as required by law, and to law enforcement officials in connection with any criminal justice investigation.

40. Sustainability: County encourages Contractor to consider the procurement and use of environmentally preferable products and services while performing services under this Contract. "Environmentally preferable purchasing" means making purchasing choices for products and services that have a lesser or reduced adverse effect on human health and the environment when compared with competing products and services that serve the same purpose. Environmentally preferable purchasing is consistent with the County's commitment to protecting our air, water, soil, and climate for current and future generations. County encourages Contractor to incorporate the following actions into Contractor's performance of the Work: environmentally preferable supplies and services; conservation of water; efficient energy use; waste prevention; reuse and recycle construction and de-construction materials in a manner that maximizes reuse of materials; sustainable transportation choices, including consideration to business communication software such as Skype alternative to air travel and public transit or carpooling for in-person meetings; pollution prevention; low toxicity for public health & safety; and reduced emissions to address climate change.

41. Limitation of Liability: COUNTY SHALL NOT BE LIABLE TO CONTRACTOR FOR ANY SPECIAL, CONSEQUENTIAL, INCIDENTAL, PUNITIVE, OR INDIRECT DAMAGES ARISING FROM OR RELATING TO THIS CONTRACT, REGARDLESS OF ANY NOTICE OF THE POSSIBILITY OF SUCH DAMAGES. COUNTY'S AGGREGATE LIABILITY, IF ANY, ARISING FROM OR RELATED TO THIS CONTRACT, WHETHER IN CONTRACT, OR IN TORT, OR OTHERWISE, IS LIMITED TO, AND SHALL NOT EXCEED, THE AMOUNTS PAID OR PAYABLE HEREUNDER BY COUNTY TO CONTRACTOR. ANY CONTRACTUAL LANGUAGE LIMITING CONTRACTOR'S LIABILITY SHALL BE VOID.

42. Legal Interpretation. Each Party recognizes that this Contract is legally binding and acknowledges that it has had the opportunity to consult with legal counsel of its choice about this Contract. The rule of construction providing that any ambiguities are resolved against the drafting Party will not apply in interpreting the terms of this Contract.

43. No Suspension or Debarment: Contractor certifies, and warrants for the Contract Term, that neither it nor its principals nor any of its subcontractors are debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Contract by any Federal or State department or agency. Contractor shall comply, and shall require its subcontractors to comply, with subpart C of 2 C.F.R. § 180.

44. Insurance: Prior to commencing the Work, Contractor will provide a Certificate of Insurance to the County demonstrating adequate insurance coverage as required by this Section. All policies evidencing coverage required by the Contract will be issued by insurance companies satisfactory to the County. Contractor will forward Certificates of Insurance directly to the **County Department** and **Contact** listed in the **Details Summary**.

a. Boulder County as Additional Insured: Boulder County shall be named as an additional insured for General Liability, Umbrella/Excess Liability, and Pollution Liability, as designated in this Contract. Additional insured shall be endorsed to the policy.

THE ADDITIONAL INSURED WORDING SHOULD BE AS FOLLOWS: *County of Boulder, State of Colorado, a body corporate and politic, is named as Additional Insured.*

b. Notice of Cancellation: Each insurance policy required by this Contract shall provide the required coverage and shall not be suspended, voided or canceled except after thirty (30) days' prior written notice has been given to the County except when cancellation is for non-payment of premium, then ten (10) days' prior notice may be given. If any insurance company refuses to provide the required notice, Contractor or its insurance broker shall notify

the County any cancellation, suspension, or nonrenewal of any insurance policy within seven (7) days of receipt of insurers' notification to that effect.

c. Insurance Obligations of County: County is not required to maintain or procure any insurance coverage beyond the coverage maintained by the County in its standard course of business. Any insurance obligations placed on the County in any of the **Contract Documents** shall be null and void.

d. Deductible: Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of Contractor.

e. Primacy of Coverage: Coverage required of Contractor and its subcontractors, if any, shall be primary over any insurance or self-insurance program carried by the County.

f. Subrogation Waiver: All insurance policies in any way related to this Contract secured or maintained by Contractor as required herein shall include clauses stating that each carrier shall waive all rights of recovery, under subrogation or otherwise, against County, its organizations, officers, agents, employees, and volunteers.

g. Requirements: For the entire duration of this Contract including any extended or renewed terms, and longer as may be required by this Contract, Contractor shall procure and maintain at its own expense, and without cost to the County, the following kinds and minimum amounts of insurance to insure the liability risks that Contractor has assumed under this Contract:

Commercial General Liability

This coverage should be provided on an Occurrence Form, ISO CG001 or equivalent, with Minimum limits of \$1,000,000 Each Occurrence, \$2,000,000 General Aggregate and \$2,000,000 Products Completed Operations Aggregate.

Automobile Liability

Bodily Injury and Property Damage for any owned, hired, and non-owned vehicles used in the performance of the Contract. Minimum limits \$1,000,000 Each Accident.

Workers' Compensation and Employer's Liability

Workers' Compensation must be maintained with the statutory limits. Employer's Liability is required for minimum limits of \$100,000 Each Accident/\$500,000 Disease-Policy Limit/\$100,000 Disease-Each Employee.

Professional Liability (Errors and Omissions)

Professional liability coverage with minimum limits of \$1,000,000 Per Loss and \$1,000,000 Aggregate. Professional Liability provisions indemnifying for loss and expense resulting from errors, omission, mistakes or malpractice is acceptable and may be written on a claims-made basis. The contractor warrants that any retroactive date under the policy shall precede the effective date of this Contract; and that either continuous coverage will be maintained or an extended discovery period will be exercised for a period of two (2) years beginning at the time work under this Contract is completed.

Third Party Commercial Crime Insurance / Third Party Fidelity Bond

The Crime limit shall be \$1,000,000 Per Loss and include an endorsement for "Employee Theft of Client Property". In order to provide coverage to County during the course of this contract, Commercial Crime policies must be endorsed to cover Third Party Fidelity. Third party fidelity covers the vendor's employees when engaged in work for a client. In addition, the County will be listed as loss payee on the commercial crime coverage. This third-party coverage can also be provided by obtaining a third-party fidelity bond.

Privacy / Cyber Liability Insurance

As a provider of a service which *may* require the knowledge and retention of personal identifiable information including but not limited to, names, dates of birth, social security numbers, usernames, and passwords, and/or HIPAA sensitive personal information of clients served, the following minimum insurance limits are required:

Contractors with 10 or fewer County clients:	\$50,000
Contractors with 11 – 15 County clients:	\$500,000
Contractors with more than 25 County clients:	\$1,000,000

Sexual Abuse and Molestation Coverage

As a provider of a service which has contact with individuals that are part of a sensitive population and are in a position of trust the following minimum insurance limits are required:

Contractors with 5 or fewer County clients:	\$100,000
Contractors with 6-10 County clients:	\$250,000
Contractors with 11-15 County clients:	\$500,000
Contractors with 16 or more County clients:	\$1,000,000

If the number of clients increases during the contract period, the required coverage limit will increase to correspond accordingly.

[Signature Page to Follow]

IN WITNESS WHEREOF, the Parties have executed and entered into this Contract as of the latter day and year indicated below.

SIGNED for and on behalf of Boulder County		SIGNED for and on behalf of Contractor	
Signature:		Signature:	
Name:		Name:	
Title:		Title:	
Date:		Date:	
↓↓ <i>For Board-signed documents only</i> ↓↓			
Attest:		<i>Initials</i>	
Attestor Name:			
Attestor Title:			



Boulder County Area Agency on Aging
Solicitation of Qualifications
SOQ #7360-22

Submittal Instructions

for OAA-SYS[®] - Request For Proposals System

Submittal Due Date

July 27, 2022, 2:00 p.m.

The Overall Process

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

Step 1: Create Profiles

For you and your agency

Login Setup

- Go to:
<https://bouldercountyaaa.oaa-sys.com/rfp/public>
- From **Open Solicitations**, select:
BCAAA SOQ for Financial Assistance
- The screen expands with instructions.

First, select the SOQ



OAA-SYS®
Request For Proposals
System

Please Log In

Open Solicitations:

- BCAAA SOQ for Financial Assistance (04/13/21-05/01/21)
- BCAAA SOQ for Choices@Home Program (04/13/21-05/30/21)

E-mail

Password

Login

Login Setup, cont'd

- *Optional*
Click to review, in advance, the SOQ Required Reading.
- If an agency profile account has been set up, enter email and password, and click **Login**.
- Otherwise, click **please click here** to create an agency profile account.

Terms and Conditions display.



OAA-SYS® Request For Proposals System

Please Log In

Open Solicitations: BCAA SOQ for Financial A ▼

E-mail

Password

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If logging in for the first time, [please click here](#)

Login

Required Reading
during SOQ

Click to create
SOQ agency
account

Login Setup, cont'd

- Read **Terms and Conditions**.
- If in agreement, select **I AGREE** and click **Submit** to continue setting up an agency account.



Boulder County
Colorado

OAA-SYS®

Request For Proposals System

Have a question? ×

Contact Carlene Okiyama at
(303) 441-1598 or
cokiyama@bouldercounty.org

Review Required Reading

Terms and Conditions

SOQ #7228-21: BCAA SOQ for Finance

1. Proposers are expected to examine the drawing, specifications, schedule of work, and drawings. Failure to do so will be at the proposer's risk.

I AGREE to the terms as noted above.

I DO NOT AGREE to the terms and conditions as noted above.

Every agency must create a profile

- One-time agency profile setup
First time agency accesses SOQ
- First of two-part process:
 - One profile for the **AGENCY**
 - Profile for SOQ contact.
- Click **Create Agency Profile**

Enter Your Agency Registration Code

Agency Already Registered?

If your agency has already registered for this Statement of Qualifications, enter your agency registration code below to continue

Agency Not Registered?

If your agency has not yet registered for this Statement of Qualifications click the button below to create an agency profile and receive a registration code

Creating AGENCY profile

1. Complete the agency registration form.
2. Click **Create Agency Profile**
3. An **Agency Registration Code** displays immediately and is also emailed to the address on the form.

Register Your Agency:

BCAAA SOQ for Financial Assistance

Please enter the following information about your agency.

Once you have registered your agency for this Statement of Qualifications, you will be assigned a system-generated Agency Registration Code. You will need to share this code with others in your organization before they can create their login profiles

Legal Name of Agency (as used in contracts)

DBA Name (if different)

Address

Street Address

Creating AGENCY profile (cont'd)

4. Retrieve the **Agency Registration Code** from the screen.
The code was also emailed:

You have successfully registered your agency for the following Statement of Qualifications: **BCAAA SOQ for Financial Assistance**

Your assigned Agency Registration Code is

TJY2-MYM6J

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

5. Provide agency SOQ contact(s) with the code.
Share code with others in the agency working on the Response.
6. Enter in **Agency Registration Code** and click **Submit** to continue.

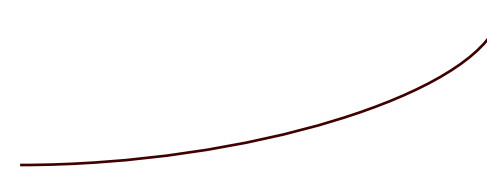
Enter Your Agency Registration Code

A record for your agency was created successfully and assigned the registration code TJY2-MYM6J. This code was emailed to the address you provided, but PLEASE WRITE IT DOWN NOW. You will need to share it with your colleagues. Once you have recorded the code, enter it below to create yourself a login profile

Agency Already Registered?

If your agency has already registered for this Statement of Qualifications, enter your agency registration code below to continue

Agency Registration Code Obtain this code from person that created your agency profile



Creating PERSONAL profile and Logging In

1. **Personal Login Profile** form displays. Complete and click **Save** to create a personal login.
Make note of the password.
2. Login page displays. Select SOQ, enter personal login email address, and password.
3. Click **Login**.

Create Your Personal Login Profile:

BCAAA SOQ for Financial Assistance

Your agency is registered for this RFP. Please create your own login profile

First Name

Last Name

Please Log In

Open Solicitations: BCAA SOQ for Financial Assistance (04/13/21-05/01/21)

email-address@gmail.com

••••••

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If logging in for the first time, [please click here](#)

Login

SOQ Required Reading sections

Required Reading for BCAAA SOQ for Financial Assistance

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

- SOLICITATION OF QUALIFICATIONS COVER PAGE
- PROPOSAL INSTRUCTIONS
- TERMS AND CONDITIONS
- SPECIFICATIONS
- NARRATIVE & QUALIFYING QUESTIONS
- INSURANCE REQUIRMENTS
- SUBMITTAL SECTION
- EVALUATION CRITERIA
- SIGNATURE PAGE
- BOULDER COUNTY SAMPLE CONTRACT

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

Agree

Beginning with SOQ cover page, which includes the schedule, program details, and provider requirements:

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

Step 2: Create Blank Response

A click of the button!

Agency Home Page

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

Create new response

Step 3: Fill in Response Details

Where the real work happens

Click **Edit**

Response Description displays
with SOQ navigation menu on left.

Existing Proposals: 1

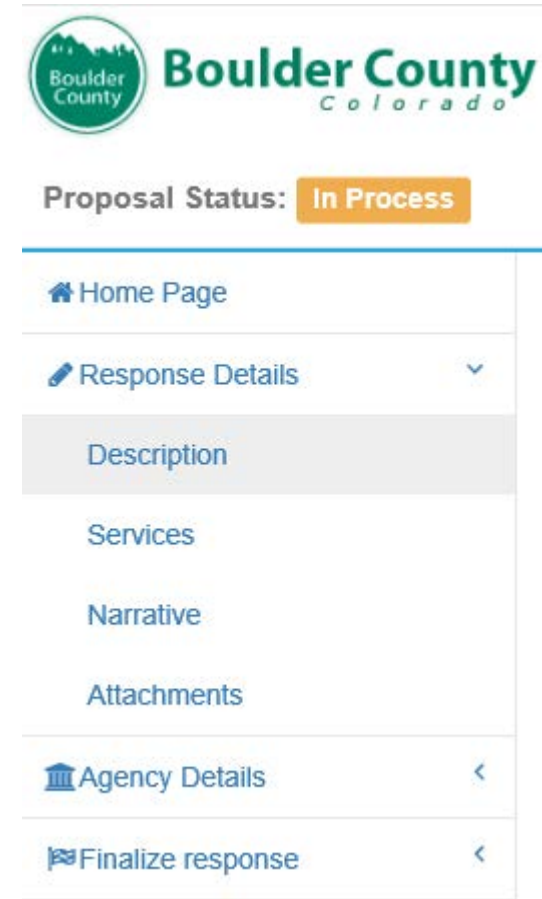
ID	Name	Created By	Status	Download (pdf)	Edit	Delete
3005	NEW BLANK PROPOSAL	Jane Ireland	In Process	 Download	 Edit	 Delete

Step 3: Response Details – Key Tasks

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

Step 3: Response Details

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



Step 3: Response Details – Description

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

Response Description

Information saved successfully

Response Title:

ABC Emergency Housing Project

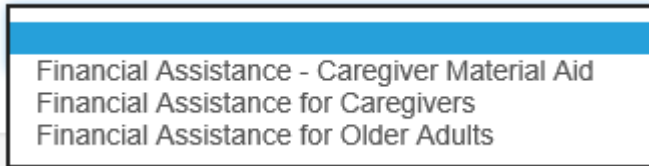
Note: You will have an opportunity to provide additional detail for each service under Services in the proposal.

Response Description:

After funds are procured, set up project administration and distribution committee to begin ide

Step 3: Response Details – Services

1. Click **Add Service** dropdown.
Select service. Options include:



Financial Assistance - Caregiver Material Aid
Financial Assistance for Caregivers
Financial Assistance for Older Adults

2. Click **Add Now**.
The service to be provided displays.
3. Select **Narrative** in the navigation menu to continue.

Response Services

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

Add Service:

Services Provided:

Service ID	Service	Delete
4096	Financial Assistance for Caregivers	Delete

Step 3: Response Details – Narrative

- Concerning the service program, answer all required questions in narrative form.
- Remember to save often to prevent loss of data.
- Then, as applicable, answer the additional questions.
- When finished, click **Attachments** in navigation menu.

Response 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: Required

Briefly describe the work your organization does and specifically the services you offer to older adults and caregivers?

Step 3: Response Details – Upload Docs

Click **Add Now** to attach and upload the required and additional documents.

Valid formats:

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)

On the navigation menu, go to **Agency Details > Agency Information**

Upload/Attach Documents

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

1. Insurance Certificate - **REQUIRED**
2. W-9 - **REQUIRED**
3. Sample Contract deviations and justification

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	Insurance Certificate	▼	Add Now
------------------------	-----------------------	---	---------

Step 3: Agency Details – Agency

Complete
Agency Information
form.

Click **Save**.

On the navigation menu, go to
Agency Details >
Contact Information

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

DBA Name: (If different)

Federal Employer ID Number (FEIN):

Inception Date:

Organization Type:

 ▾

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

Save

Step 3: Agency Details - Contact

Complete primary contact information and create other contact records.

In navigation menu, click **Finalize Response** ► **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 Response – Check for errors

Validate. Submit. Print.

Step 4: Validation Process

- RFP system reviews response for errors.
- First attempt will probably yield errors.
- Submit is not possible 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**

Step 4: 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 request and receipt of system-generated “Proposal Identification Number” (PIN)
 - System emails the PIN
 - There must be valid emails for two key contacts:
 - CEO/Director of the agency
 - SOQ response contact.

Step 5: Submit Finalized Response

Submit your Response

Step 5: Finalize Response – Request a PIN

- Under Submit Response, 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.

Back

Submit

Step 5: Finalize Response – 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
Agency
Proposal
Submitted Date
Submitted Name
Submitted Email Address
Status