

TRUMBULL COUNTY COMMISSIONERS
Request for Proposal (RFP)

SENIOR COMMUNITY CENTER
(31-page document)
For
Fiscal Years
(SEPTEMBER 2023-AUGUST 2025)
TWENTY-FOUR (24) MONTH CONTRACT

Due: June 8, 2023 @ 2:30 PM

ISSUED by
BOARD OF TRUMBULL COUNTY COMMISSIONERS
160 HIGH STREET, N.W.
WARREN, OHIO 44481
Ph. 330-675-2451 Fax 330-675-2462



Point of Contact: Paula Vivoda-Klotz, Clerk
Email: cevivoda@co.trumbull.oh.us

PREPARED by:
Senior Services Advisory Council (SSAC)
2931 Youngstown Rd. SE
Warren, Ohio 44484

Final edit 5-9-2023


The Senior Services Advisory Council (“SSAC”), appointed by the Trumbull County Commissioners, is requesting proposals (“RFP”) for Community Based Services to be provided to Senior Citizens (individuals 60 years or older) residing in Trumbull County. SSAC charge is to recommend to the Commissioners the evaluation of submitted RFP and distribution of levy funds. Upon approval, Trumbull County Commissioners will contract with the provider; a monitoring staff will evaluate the successes or shortcomings and report to the Trumbull County Commissioners as well as SSAC.

A .75 mil, five-year property tax levy originally passed in November 2005 with renewals passing November 2010, 2015, and 2019 for approximately \$2,400,000 dollars annually to fund specific senior services including Senior Community Centers.

The funding advertised by The Board of Commissioners is for FY 2023-2025 and is specifically intended to provide services for Trumbull County senior citizens 60 years of age or older. The mission of the SSAC is to ensure that services are available in the community to assist older adults in remaining independent and living in a home environment and preventing premature institutionalization.


**SENIOR LEVY ANNUAL DOLLARS AVAILABLE
for
SENIOR COMMUNITY CENTERS
\$625,000 total**

The Trumbull County Board of Commissioners will fund in the following increments based upon hours of operation with programming requirements to be provided to seniors **DAILY**, free socialization and recreation activities per each Center Managers’ design. Centers may choose to add fees to various instructor programs at their discretion, as well as receive grants and other fundraising events to subsidize the cost of centers’

operations.  **Per ORC 173.12**, services provided by a multipurpose senior center shall be available to all residents of the area served by the center who are sixty years of age or older, except where legal requirements for the use of funds available for a component program specify other age limits. Persons who receive services from the center may be *encouraged* to make voluntary contributions to the center, but no otherwise eligible person shall be refused services because of inability to make a contribution. Membership fees cannot be mandatory.

Maximum Grant for 4-hour Senior Community Center/5 days per week	\$37,465
Maximum Grant for 6-hour Senior Community Center/5 days per week	\$56,345
Maximum Grant for 8-hour Senior Community Center/5 days per week	\$78,430

The successful grantee will demonstrate significant community support, including a letter of support from the political subdivision in which the center is located.

 Any Community Center requesting funds **must provide** Match Dollars (In-Kind, actual cash, external source support) from an external source equaling **25%** or more of the total amount requested from Senior Levy funds. ***An outside source does not include membership of participants, cash on hand, or event fund raising by the community center.***

Programming Requirements
Two-Year Program Invoicing For Services Provided

Invoices will be submitted monthly based on programs offered (One Unit = One Hour Program) with participation of **at least one Trumbull County Resident Senior aged 60 and older** per the calendar of events presented prior to the start of the month. If the program exceeds or is less than one hour per the calendar, the program will be proportionally adjusted. The intention of the SSAC is to promote quality-scheduled programs for reimbursement but also a place to socialize to help alleviate loneliness or isolation.

Per the monthly calendar of events, the following programs are suggested as planned monthly.

Four (4) Hour Center:

Instructional Program by Volunteer or Paid Instructor	at least 3 per week
Medical Program	at least 1 per week

Six (6) Hour Center:

Instructional Program by Volunteer or Paid Instructor	at least 6 per week
Medical Program	at least 1 per week

Eight (8) Hour Center:

Instructional Program by Volunteer or Paid Instructor	at least 9 per week
Medical Program	at least 1 per week

! All programs developed/scheduled per Center Manager design is based upon the senior’s needs within the community that the center is located. All programs must occur on site or within walking distance except any Supportive Service visits at the seniors’ home. Billable Programs are organized events per monthly calendars provided to the public.

For reimbursement, all programs (except One-to One Supportive Services) must be listed on the calendar of events along with the time of day the program is offered. All calendars for the month must be e-mailed to the senior services administration office (sljurkov@co.trumbull.oh.us) within the first week of that month. Amendments will be accepted if the added event has not occurred at the time of submission. No Calendar-No Reimbursement. In addition, the monthly summary of programs/attendance report must be submitted as input in provided program (SAMS reporting software) unless prior approval by the Senior Levy Administrator/Council has been given for alternative reporting. New operations will be given access to SAMS and trained accordingly.

Program Categories

INSTRUCTIONAL PROGRAMS: **!** **Instructor must be present:** Educational Speakers, Computer Tutor and workshops, Laptop iPad assistance, Crafting Class, Music/Art Instruction, Paint & Taste, Knit & Crochet class, Dance Instruction, Wood Carving, Tai Chi, Fitness Room, Yoga, Pilates, Balance & Strength, Stretch Exercises, Arthritis Exercise, Self Defense, Boot Camp, Chair Belly Dance, Line/Square/Tap Dancing, or any other program with the need of an instructor.

! Educational Speakers is a program providing older individuals with the opportunities to acquire knowledge and skills suited to their interests, well-being, and capabilities through either formal or personal

enrichment, and to bring education/instruction programs into the center from the surrounding community using qualified instructors. (Qualified instructors are defined as either a two-year degree in similar field of instruction, proof of 5 yrs. experience in the similar field of instruction, or certification from a related authority.)

MEDICAL PROGRAMS: Health Seminars/Programs, Chronic Disease Class, Chair Massage, Health Screening, Dental Van, Physical Therapy, Foot Care, Red Cross Blood Draw, Blood Pressure checks or other similar assessments, Parkinson's Support Group or other Medical Support Groups, Weight-Watchers, Gym-Fitness offered equipment programs.

OTHER PROGRAMS of SOCIALIZATION/RECREATION: Scheduled Programs designed to promote the well-being of older persons with group participation activities to alleviate loneliness or isolation. Bingo, Card Coloring for Stress, Arts/Crafts/Sewing/Quilting without instructor, Group Card games, Group Board/Dice games, Mind games, Billiard Pool, Group Board games, Book Club, Bible Study, Movies, Red Hatters, Club meetings, Air Hockey, Ping Pong, Corn hole, Bocce, Meal Programs (Potluck, lunches, dinners, birthday celebrations), plus any other not specifically listed under Instructional, or Medical programs.

ONE-ON-ONE SUPPORTIVE SERVICES: Reimbursed based upon time documented/Program Unit Rate awarded: Social Work Services, Information & Referral, Senior Counseling, Income Tax Program assistance. One-on-One interaction providing community resource information or obtaining community services that will alleviate an inquirer's (60+) unmet needs enabling them to maintain independence in the community. Documentation of service to include amount of time with the senior on the required participation record per Conditions of Contracting, page 8, item 6a.

- a. Assistance and advocacy in obtaining benefits or services through completion of necessary forms, e.g. Medicare, Medicaid, Insurance, Food Stamps. Assistance with referrals and linkage of clients to appropriate community resources that could include scheduling initial appointment and follow-up (contacting client and/or applying for public benefits. This does not include transporting client to appointments.
- b. Assistance with or teaching skills in handling personal finances and budgeting.
- c. Language translation and/or interpretation for the purpose of accessing other services, e.g. medical appointments.
- d. Coordination with Adult Protection Services to provide ongoing support to maintain the situation or improve clients' ability to manage at home.

General Instructions

1. Applicants with questions or concerns may contact Paula Vivoda-Klotz at the Trumbull County Board of Commissioners. The contact information is:

BOARD OF TRUMBULL COUNTY COMMISSIONERS
160 HIGH STREET, N.W.
WARREN, OHIO 44481
Ph. 330-675-2451 Fax 330-675-2462
Email: cevivoda@co.trumbull.oh.us

After the issuance date of this RFP, questions concerning the RFP by any proposer is required to be written and submitted to cevivoda@co.trumbull.oh.us with "Sr Center RFP question" in the Subject Line. Questions and answers will be provided to all Agency's documented as receiving this RFP.

2. Proposals for Senior Community Center Services must be submitted to The Board of Trumbull County Commissioners, per address in item #1, no later than 2:30 p.m., June 8, 2023. Proposals submitted after 2:30 p.m. June 8, 2023 will NOT be considered. Trumbull County Commissioners office personnel will time stamp the submitted information box for proof of proper arrival time. The full name and address of the bidding organization and “Attn: Paula Vivoda-Klotz, Senior Levy RFP” must be placed on the outside of the **sealed** containment of the proposals. Please do not place the label over a box top seam that would risk being cut/split upon opening the box/containment.
3. The contract period for funds awarded is September 1, 2023 through August 31, 2025. Any active contracts expiring after September 1, 2023 and awarded for this bid cycle will be replaced with this current award.
4. Six (6) complete proposals must be submitted in a **sealed envelope or box should you choose to send the RFP response via paper and not electronically.**



- PREFERRED THIS CYCLE:** Please submit - One (1) complete paper proposal and one (1) electronic format: (1) USB Flash Drive with all documents as submitted in paper format. These documents will be shared with SSAC members for review per county guidelines to protect the data involved. To expedite and simplify the process for evaluating proposals, and to assure each proposal receives the same orderly review, it is required that all proposals be submitted in the format as also described below per **Submission of Proposal**. Proposals shall contain all the elements of information specified **without exception unless otherwise noted.** The paper format must be bound/hole punched and organized within a three-ring binder with each Section tabbed and labeled. The full name and address of the organization and “Attn: Paula Vivoda-Klotz, Senior Levy Bids” must be placed on the outside of the **sealed** containment of the proposal. Please do not place the label over a box top seam that would risk being cut/split upon opening the box/containment.
5. The request for proposal is being issued based on the presumed availability of funds. Trumbull County will not be liable should funds be eliminated or reduced.
 6. Completion of a proposal does not imply that SSAC or the Board of Trumbull County Commissioners will fund a proposal. Proposals are subject to review by representatives of the Board and staff of the SSAC, and the Trumbull County Board of Commissioners.
 7. At its sole discretion, SSAC, at the direction of the Trumbull County Board of Commissioners, may negotiate the unit price, or any other factors, including, but not limited to, the total funds and the composition of those funds, prior to determining to enter or not to enter a contract based on the proposal.
 8. SSAC and/or the Trumbull County Commissioners may conduct discussions with Proposers who submit proposals for the purpose of clarifications or corrections regarding a proposal to ensure full understanding of, and responsiveness to, the requirements specified in the RFP. SSAC may at its sole discretion, determine that it is in its best interest to interview certain applicants.
 9. The SSAC and/or the Trumbull County Commissioners reserve the right to reject any proposal in which the Proposer takes exception to the terms and conditions of the RFP; fails to meet the terms and conditions of the RFP, including but not limited to, the standards, specifications, and requirements specified in the RFP; or submits prices that the Trumbull County Commissioners consider to be excessive, compared to existing market conditions, or determines exceed the available funds of the contracting authority.

10. The Trumbull County Commissioners reserve the right to reject, in whole or in part, any proposal that SSAC or Trumbull County Commissioners has determined, using the factors and criteria developed and included in the advertised RFP, would not be in the best interest of the County.
11. Persons completing a proposal are cautioned to reflect service goals, expenditures and other information accurately. Proposals will be evaluated on a number of factors including but not limited to, the past performance of the applicant, the anticipated performance of an applicant and the accuracy of the information submitted. Performance during the contract year will be evaluated based on the entire contract document.

Submission of Proposal

1. Proper Assembly of Proposal (proposal begins on page 13) for Paper submitted RFP; Original and all copies to tab and label each section accordingly:
 - a. Section I: Completed Application (page 13-14) for Original and all copies
 - b. Section II: Commissioner's Office Required Documents (page 15-19) Original and all copies
 - c. Section III: Portal Requirements as listed (page 20-21) (Original **only**)
 - d. Section IV: Contract Compliance (page 22) Original and all copies
 - e. Senior Center Questionnaire (page 23) Original and all copies
 - f. Section V: Revenue/Expense Budget (page 24-29) Original and all copies
 - g. Section VI&VII Service Quality & Capacity (page 30-31) Original and all copies

For the Six (6) paper submissions, one of the five binders with original signed documents (Blue Ink) must be labeled as "Original", and one as "Administrator copy". Expensive binding, colored displays, promotional materials and the like are not necessary or desired, **OR PREFERRED** For electronic: submit -One (1) complete paper proposal and One electronic format : (1) USB Flash Drive that includes all documents as submitted in paper format.

2. All proposals submitted shall become the property of Trumbull County to use or, at its option, return. All proposals and associated documents will be considered public information and will be open for inspection to interested parties unless identified as proprietary AFTER contracts are awarded by the Trumbull County Commissioners. Trade secrets or proprietary information that are recognized as such and protected by law may be withheld if clearly identified as such in the proposal. Each page containing such material must specify "PROPRIETARY" in the upper right corner. SSAC will make the determination as to whether the Provider has adequately demonstrated the information as proprietary
3. The costs of developing proposals are entirely the responsibility of the Provider and shall not be chargeable to Trumbull County under any circumstances. All materials submitted in response to the RFP will become the property of the Trumbull County Commissioners and SSAC and may be returned only at SSAC's option and at the provider's expense.
4. Proposals that contain false or misleading statements, or which provide references which do not support an attribute or condition contended by the Provider, may be rejected. If, in the opinion of SSAC, such information was intended to mislead SSAC in its evaluation of the proposal and the attribute, condition, or capability is a requirement of the RFP, the proposal will be rejected.
5. The proposal shall be signed by an individual who is authorized to bind the Provider contractually. The signature must indicate the title or position the individual holds in the Provider's organization. Providers who sign contracts with the name of the Provider's organization must also provide the name of an officer of the Provider's organization for signature validation by SSAC. Any and all unsigned proposals will be rejected.

6. No telegraphic, facsimile, telephone or e-mail proposals will be accepted. If mailed, the Provider should use certified or registered mail, UPS, or Federal Express with return receipt requested.
7. All documents included in the proposal must be completed to be considered a valid proposal. Each proposal must meet the Portal Requirements at a Minimum in order to be a valid proposal for funding. **If a particular request does not pertain to your organization, please note accordingly or present documentation why the request would not apply.**



It is absolutely essential that Providers carefully review all elements in their final proposals. Once opened, SSAC reserves the right to request clarification/correction/changes as permitted by ORC 307.862 and per bidding requirements.

Conditions of Contracting

Service providers shall meet these conditions of participation:

1. Be a formally organized business or service agency providing the services requested, and shall:
 - a. Disclose all entities with a five percent or more ownership, and have a written statement defining the purpose of the business or service agency.
 - b. Have a written statement of policies and directives, bylaws, or articles of incorporation.
 - c. Have a written table of organization that clearly identifies lines of administrative, advisory, contractual, and supervisory authority unless the business is a sole proprietorship.
 - d. Operate the business in compliance with all applicable federal, state, and local laws, and shall have a written statement supporting compliance with:
 - (1) non-discrimination laws, federal wage and hour laws, and workers' compensation laws in the recruitment and employment of individuals
 - (2) non-discrimination laws in the provision of services, and
 - (3) federal rules and statutes take precedence over these conditions in cases where discrepancies between these exist.
 - e. Have a written affirmative action plan that must be appropriately updated, and will be reviewed at least annually.
2. Have a physical facility from which to conduct business. The facility should have a telephone and a designated and utilized locked storage space for the maintenance of participant records.
3. Have written procedures supporting the operation of the business and provision of service, and shall:
 - a. Have a system to document services delivered, billed, and reimbursed that complies with service specifications.
 - b. Provide evidence supporting financial responsibility in the coverage of participant loss due to theft, property damage, or personal injury, and have a written procedure that identifies the steps a participant must take to file a liability claim.
 - c. Have a written procedure for reporting and documenting all participant incidents including significant changes that affect service delivery or imminent health or safety risks.
 - e. Maintain documentation of each participant contact and each service delivered (sign-in sheet)
 - f. Obtain written approval from the participant to release participant information.
 - g. Retain all participant records for at least three years or until an audit is completed and all exceptions resolved, whichever is later.
 - h. Have a written procedure for follow-up and investigation of participant complaints and grievances, and a method to inform participants at the inception of services of the contact number for the resolution contact.

4. Have written personnel policies and documentation that support personnel practices for Providers that include:
 - a. Job descriptions or statement of job responsibilities including qualifications for each position involved in the delivery of services unless the business is a sole proprietorship.
 - b. Performance appraisals or a development plan for all employed or contract workers, and volunteers involved in providing service to participants unless the business is a sole proprietorship.
 - c. Prior to service provision, a Provider staff signature and a date that indicates completion of orientation that includes:
 - i. Employee position description and expectations
 - ii. Personnel policies
 - iii. Reporting procedures and policies
 - iv. Table of organization and lines of communication
 - v. A code of ethics which declares that the Provider staff shall not:
 - (1) Use the participant's vehicle
 - (2) Use the participant's telephone for personal calls
 - (3) Discuss personal problems or religious or political beliefs with the participant
 - (4) Accept gifts or tips from the participant
 - (5) Breach the participant's privacy or the confidentiality of participant records
 - (6) A policy that assures that all participant information will remain confidential
5. Perform background checks of all employees.
6. Sign a contract with Trumbull County Commissioners for the program service area in which Provider services are rendered; and the Provider shall:
 - a. Maintain a participant record of each program provided (Sign-in Sheet for each and every daily program including signature, printed name, address and date of birth) as documentation of attendance by that senior).
 - b. Allow access to SSAC and to other representatives with a need to access the Provider's facility, policies, procedures, records and other documents related to the provision of services.
 - c. Demonstrate compliance regarding background investigations of direct service workers.
 - d. Deliver services five days a week.
7. Failure to meet any of the requirements of these conditions may lead to termination of the Trumbull County Commissioner's contract with the service Provider.

Applicable Laws and Rules

Service Providers shall understand, agree with, and comply with the following:

1. American's with Disabilities Act of 1990
2. Occupational Safety and Health Act of 1970
3. Equal Employment Opportunity Act
4. Ohio Revised Code - All laws and regulations pertaining to the services provided.

Acceptance and Evaluation of Proposal/Award of Contract

SSAC reserves the right to make recommendations to the Board of Commissioners as to the following:

- ❖ award a proposal received on the basis of individual items, or on the entire list of items
- ❖ reject any or all proposals, or any part thereof
- ❖ waive any informality in the proposals

The decision of the SSAC and the Trumbull County Commissioners shall be final. The waiver of an immaterial defect shall in no way modify the RFP documents or excuse the Provider from full compliance with its specifications, if the Provider is awarded the contract.



Review Process

The review process will be conducted in two (2) stages. **Stage 1** will consist of a preliminary review to ensure that the proposal materials adhere to the minimum requirements (and mandatory conditions) specified in the RFP. Proposals that adhere to the minimum requirements will be deemed “Qualified”. Those which do not will be deemed “Non-Qualified”. “Non-Qualified” proposals will be placed in the inactive file. Partial submissions or proposals submitted after the designated deadline will be determined to be non-responsive and will be “Non-Qualified”.

“Qualified” proposals will then be reviewed in **Stage 2**, in accordance with the review process.

A. Stage 1 Review:

“Qualified” proposals in response to the RFP must meet the following requirements:

1. **Timely Submission** - The proposal is received at the address per Page 4-General Instructions Item #1. Proposals mailed but not received at the designated location by the specified date will be deemed “Non-Qualified” and will not be considered by SSAC.
2. **Completeness of Submission** - proposal submission must include at minimum:
 - a. Timely Submission of the Proposal.
 - b. Required number of copies per page 5, item 4. See new comment for Electronic copy.
 - c. Proper Assembly (Page 6, Item #1 of Submission of Proposal).
 - d. Easily reproduced - quality paper- clearly formatted using Times Roman (or similar), 12-point font.
 - e. Determination that the proposal meets minimum qualifications outlined in this RFP.



Proposals that do not meet all of the above First Stage Review submission requirements will be deemed ‘non-qualified’ and will not be reviewed for Stage 2.

B. Stage 2 Review:

All “Qualified” proposals will be reviewed, evaluated and rated. Comparisons among or between proposals is not appropriate and will not occur. At any time during the review, and at any level of the review, SSAC may request additional information from the Provider. Such information requests and Provider’s responses must always be in writing. Each Subcommittee plans to schedule and meet with bidders direct to discuss and clarify proposal information. Information may be requested from sources other than the written proposal to evaluate the Provider.

All information obtained will be used in conjunction with the data from Stages 1 and 2 to make a final selection. The evaluation may include, but will not be limited to the following:

- ❖ strength and stability of the Provider to provide the requested services
- ❖ ability to provide service as contracted
- ❖ overall responsiveness, viability and completeness of the proposal as well as the likelihood that in SSAC’s opinion and at SSAC’s discretion, the proposal best meets or exceeds SSAC’s specifications.
- ❖ the criteria for the Stage 1 review
- ❖ scope of service being proposed
- ❖ personnel qualifications
- ❖ distinguishing characteristics
- ❖ cost of proposed service
- ❖ any other facts considered relevant by SSAC, as demonstrated by the proposal or investigation by SSAC.
- ❖ experience with a similar project of comparable size and scope.

Proposal Selection

Proposal selection does not guarantee a contract for services will be awarded as Trumbull County Commissioners make final determination based upon recommendation by SSAC. All proposals will be evaluated in accordance with the following evaluation tool as submitted and any direct interview as completed between bidder and subcommittee members. **Proposals are rated as follows:**

Proposals will be evaluated on all information given with points given per the following categories.
Included but not limited to the following information (100 Point Total)

<u>1) Contract Compliance (Application Section IV, page 22)</u>	<u>TOTAL POINTS</u>
Narrative from Organization (Question A)	5
Income Collection Controls of organization (Question B)	2
Advertisement of Senior Levy Dollars (Question C)	2
Long Term Sustainability (Question D)	6
<u>2) Service Budget and Service Goals (Application Section V - Applicant Budget)</u>	
Unit Rate Requested (page 25)	10
Budget Information accurately provided as requested (page 24-29)	10
<u>3) Quality of Service (Application Section VI, page 30)</u>	
Staff Qualifications – Section VI-A&B	5
Quality of Programs Offered – Section VI-C	20
<u>4) Service Capacity (Sr. Ctr. Questionnaire page 23 & Application Section VII, page 31)</u>	
Pending Lawsuits (0 points if have pending legal filings, 5 if none)	0-5
Hours of Operation, membership, new programs, program goals, unique operations	35

1. Based upon the results of the evaluation, SSAC will select a Provider(s) for the service whose proposal is most advantageous to the county.
2. If SSAC and the Provider are able to successfully finalize the contract document details, SSAC will recommend the Provider to the Trumbull County Commissioners for a contract award.
3. If SSAC and the Provider are unable to successfully come to terms regarding the contract, SSAC reserves the right to terminate contract discussions with the Provider. SSAC will not recommend the Provider to the Trumbull County Commissioners. In this event, SSAC reserves the right to select another Provider from the proposal process, cancel the RFP or reissue the RFP if this is deemed necessary.

Post Selection Meeting

Only “Qualified” Providers passing the first level review, who wish to obtain clarifying information regarding their non-selection, may utilize the post-selection meeting. If a Provider wishes to discuss the selection process, the request for an informal meeting and the explanation for it must be submitted in writing within five days of the receipt of the non-selection notice. The request for a meeting should be sent to Trumbull County Senior Levy Services, Attn: Diane Siskowic-Jurkovic, Senior Levy Administrator at 2931A Youngstown Rd. SE, Warren, OH 44484.

Terms and Conditions

The contents of the RFP and the Commitments set forth in the selected proposals shall be considered contractual obligations, if a contract ensues. Failure to accept these obligations may result in cancellation of the award.

Type of Contract

The evaluation of proposals submitted in response to this RFP may result in the issuance of a contract. The contract shall incorporate the terms, conditions and requirements of the RFP, the Provider’s proposal, and all other agreements that may be reached. Senior Services Advisory Council, Senior Levy Administrator, and Trumbull County Commissioners will design, develop and implement the structure of the contract. The successful Provider’s proposal, this RFP and other applicable addenda will become part of the final contract. The Senior Levy Administrator will administer the final contract for the Trumbull County Commissioners.

Contract Period, Funding & Invoicing

A contract will be written for a period of twenty-four (24) months. SSAC Senior Center Subcommittee Evaluation may be performed every 4 months as outlined below. Providers will submit invoices per page 3-4 as follows: In addition, for Invoice approval and payment, the administrator must also have the corresponding calendar of programs, and SAMS (or other approved program) summary report of the invoiced month.

Post Award Requirements

Performance Goals and Outcome Measures

Providers are expected to track and measure indicators of program performance.

1. Examples of performance goals include:
 - a. Expand and improve training programs and opportunities
 - b. Expansion of service to new participants
 - c. Expansion of service to underserved areas of the County
 - d. Expansion of current services (time and staff allotted to program)

2. Examples of outcome measures Providers may be asked to collect:
 - a. Number of training sessions and participants
 - b. % of service considered an expansion
 - c. % of participants included in expansion
 - d. % of participants in any geographic area of the county (e.g. townships)

3. Prepare and utilize documents for monitoring goals and outcomes.
4. Suggest that Center Managers will meet every 4 months to review and evaluate the senior centers performance and make changes to programming if needed. Collaboration with other senior centers in the county is encouraged and if proof is provided as to a plan to collaborate, will assist with positive points of evaluation.

Patent or Copyright Liabilities

The Provider will protect, defend, indemnify, and hold free and harmless SSAC, Trumbull County, its officers, employees, agents and Board of County Commissioners ("Releasees") against all claims that any of the designs or services supplied hereunder infringe a U.S. patent or copyright. The Provider will pay all resulting costs, damages, and attorney's fees to indemnify and defend the Releasees against such claims. SSAC will promptly notify the Provider in writing of all claims, and the Provider will have control of the defense and all related settlement negotiations.

If such claim has occurred, or is likely to occur, SSAC agrees to permit the Provider, at Provider's option and expense, either to procure for SSAC the right to continue using the designs or programming services or to replace or modify the same so that they become non-infringing but still meet the requirements of the RFP.

Confidentiality and Security

Any Provider engaging in any service for SSAC requiring them to encounter confidential SSAC information will be required to hold confidential such data made available to them.

Software and Ownership Rights

The Board of County Commissioners will have ownership rights in **software, software modifications, and associated documentation designed, developed, or installed with the use of County funds**. SSAC and the Board of County Commissioners reserve a royalty-free, nonexclusive and irrevocable license to reproduce, publish, or otherwise use and authorize others to use the software, software modifications and documentation for County, State and Federal government purposes.

Publicity

Any program descriptions, publicity releases, or other public references including but not limited to, both internal and external informational pamphlets, brochures, and media releases on the services provided under this RFP will clearly state that the services are funded in whole or in part by the Trumbull County Senior Services Levy. Provider assumes responsibility for the development and cost associated with these items and agrees to obtain approval from SSAC before releasing promotional materials and/or items.

2023 Required Proposal Documents

Section I: Summary (Page 13-14)

Section II: Original Signed Documents (Page 15-19)

Section III: Portal Requirements (Page 20-21)

Section IV: Contract Compliance (Page 22-23)

Section V: Revenue and Budget per Center (Page 24-29)

Section VI: Quality of Service per Center (Page 30)

Section VII: Service Capacity for Community Center
Requesting Funds (Page 31)

Section I: Summary

Trumbull County Senior Levy Services

**SUMMARY PAGE OF APPLICATION
PAGE 1 OF 2**

TWO-YEAR PROGRAM

**Application for Community Senior Centers Funding
(SEPTEMBER 2023-AUGUST 2025)**

Organization: _____

Address: _____

County: _____

Phone #: _____ Fax #: _____

Contact Person: _____ Email: _____

Application prepared by: _____ Date _____

Previously Funded _____ New Applicant _____

Instructions for Application:

***Proposal must be received before 2:30 PM June 8, 2023
Deliver/mail in a SEALED envelope/box/containment to: Paula Vivoda-Klotz,
The Board of Trumbull County Commissioners
160 High Street N.W., Warren, Ohio 44481
Place full name and address of bidding organization and
Senior Levy Bids on outside of sealed containment.***

SUMMARY OF ANNUAL REQUESTED FUNDS PER 4, 6 OR 8 HOUR CENTER*

! (IF MULTIPLE CENTERS PER ORGANIZATION, SEPARATE BID PER SITE)
ALL SERVICES PROVIDED ON SITE UNLESS SPECIFICALLY NOTED IN BID SPECS

Summary of Request

4 HOUR / DAY CENTER for \$37,465 Maximum

Proposed # Programs from Page 25 (Budget Computation) _____

Unit Rate Requested from Page 25 (Budget Computation) _____

Total Requested from Page 25 (Budget Computation) _____

6 HOUR / DAY CENTER for \$56,345 Maximum

Proposed # Programs from Page 25 (Budget Computation) _____

Unit Rate Requested from Page 25 (Budget Computation) _____

Total Requested from Page 25 (Budget Computation) _____

8 HOUR / DAY CENTER for \$78,430 Maximum

Proposed # Programs from Page 25 (Budget Computation) _____

Unit Rate Requested from Page 25 (Budget Computation) _____

Total Requested from Page 25 (Budget Computation) _____

Section II: COMMISSIONER OFFICE

Documents Required to be signed in Blue Ink with Original Signatures and Public Notary if required:

- 1) Terms and Conditions
- 2) Non Collusion Affidavit
- 3) Personal Property Tax Delinquency Affidavit
- 4) Drug & Alcohol Policy Sign-Off Document: After reading the enclosed County Drug and Alcohol Use Policy



Terms and Conditions

It is understood and agreed upon by the undersigned authorized individual that: Funds granted as a result of this request are to be expended for the purposes set forth and in accordance with all applicable laws, regulations, policies, and procedures of this State and the Administration on Aging of the U.S. Department of Health and Human services. Any proposed changes in the proposal as approved will be submitted in writing by the proposer and upon notification of approval by the Trumbull County Commissioners shall be deemed incorporated into and become a part of the parties' agreement. This request for proposal is being issued based on the presumed availability of funds from the Trumbull County Government. Neither the Senior Services Advisory Council, nor Trumbull County, will be liable should funds be eliminated or reduced. Completion of a proposal does not imply that the Senior Services Advisory Council or the Trumbull County Commissioners will fund a proposal. Proposals are subject to review by representatives of the Senior Services Advisory Council and Board and the Senior Levy Administrator. If, in the opinion of Trumbull County and Senior Services Advisory Council, information as submitted was intended to mislead SSAC in its evaluation of the proposal as to the attribute, condition, or capability as a requirement of the RFP, the proposal will be rejected. At its sole discretion, the Senior Services Advisory Council may negotiate the unit price, or any other factors, including, but not limited to, the total funds and the composition of those funds, prior to determining to enter a contract based on a proposal. Contracts are awarded to the offeror whose proposal is most advantageous to the County. The awardee hereby agrees that it will comply with all Ohio Department of Aging Service Standards. Failure to comply may result in termination of contract. Proposers should read and understand the conditions of contracting in the instruction booklet. Proposers will be required to comply with all applicable service specifications and conditions of contracting should a contract be awarded. Failure to comply may result in termination of contract. Service providers shall understand, agree and comply with the following applicable laws and rules:

1. American's with Disabilities Act of 1990
2. Occupational Safety and Health Act of 1970
3. Equal Employment Opportunity Act
4. For transportation, Clean Air Act, as amended, 42USC AA 7401 et seq., if contract exceeds \$100,000.
5. Certify that no funds appropriated by the contract will be used for lobbying ads described in 31 USC 1352.
6. Provider certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
7. Ohio Revised Code- All laws and regulations pertaining to the services provided.

Print Name

Authorized Signature

Print Title

Date

NON-COLLUSION AFFIDAVIT

STATE OF OHIO)
) SS
COUNTY OF TRUMBULL)

_____ being first duly sworn, deposes and says that he/she is _____ (Sole Owner, a Partner, President, Secretary, etc.) of _____, the party making the proposal; that such proposal is not made in the interest of or on behalf of any disclosed person, partnership, company, association, organization, or corporation, that such proposal is genuine and not collusive or sham; that said bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that said bidder has not in any manner, directly or indirectly sought by agreement, communication or conference with anyone to fix the bid price of said bidder or of any other bidder, or to fix any overhead profit, or cost element of such bid price, or of that of any other bidder or to secure any advantage against Trumbull County; that all statements contained in such proposal are true; and further, that said bidder has not, directly or indirectly, submitted his bid price or any breakdown thereof, of the contents thereof, or divulged information or data relative thereto, or paid and will not pay any fee in connection therewith, to any corporation, partnership, company, association, public official or employee, organization, or to any other individual except to such person or persons as have a partnership or other financial interest with said bidder in this general business.

Signed: _____

Title: _____

SWORN to and SUBSCRIBED before me this _____ day of _____, 2017, in and for _____ County, State of Ohio.

My Commission expires _____

NOTARY PUBLIC

SIGN-OFF SHEET*

Trumbull County certifies that it will provide a drug free workplace to its employees in compliance with the Drug Free Workplace Program of Ohio Bureau of Workers' Compensation.

By signing below, the undersigned certifies that they have:

1. Read and understand the "Drug and Alcohol Policy Statement" and agree to abide by its full terms.
2. Read and understand the "Compliance with the Drug Free Workplace Act" statement and agree to abide by its full terms.
3. Agreed to make a good faith effort to continue to maintain a drug and alcohol free workplace.
4. Been provided with a written copy of this policy.

NAME OF COMPANY (PRINT)

SIGNATURE (TITLE)

Date

Section III: Portal Requirements

Portal requirements are specific requirements of the applicant organization submitting a request for proposal. All portal requirements must be met before the proposal will be considered. **Failure to provide the following will result in the Senior Services Advisory Council not considering the proposal.** If a particular request does not pertain to your organization, **please note accordingly or present documentation why the request would not apply.**

- Timeliness-** The proposal for services will not be accepted if it arrives after the deadline specified. The deadline for the submission of the proposal is **June 8, 2023 no later than 2:30 p.m.** The location for delivery is the Board of Trumbull Co Commissioners Office, 160 High Street NW, Warren, Ohio 44481
- Audits -** The organization's most recent independent financial audit (minimum 2021 and/or later) prepared in accordance with Auditing Standards Generally Accepted in the United State of America or if the applicant does not normally have an independent audit, acceptance of a compilation or Review Report prepared by an independent accountant for the proposer's most recent fiscal year end or 2021 calendar year if 2022 is not completed at time of submission. The statement must be prepared in accordance with Statements on Standards for Accounting and Review Services Issued by the American Institute of Certified Public Accountants. These statements are prepared in accordance with GAAP (General Accepted Accounting Principles). In lieu of financial statements prepared on the accrual basis (GAAP), acceptance of financial statement prepared on the cash or income tax basis of accounting with full disclosure. For governmental entities, provide the website for access to appropriate audit. The audit or independently prepared financial statement must clearly show the organization bidding on the contract.
- Business Tax Returns-** The proposer must submit the most recent filed federal, state, and city (as appropriate) tax returns. Tax returns submitted must be current to the last filing deadline for the last filed return plus an extension.
- Payroll Quarterly Taxes-** Copies of the last IRS Form 941 filed. A statement or other agreement regarding any back taxes owed to either the federal or state governments is required if it pertains to a payment agreement with the taxing agency and must be current or must be under dispute between the taxing authority and the organization.
- Insurance-** Evidence of a current liability policy for one million dollars **with Trumbull County Board of Commissioners 160 High Street NW, Warren, Ohio 44481-1093 named as additional insured is required.**
- Worker's Compensation-** A copy of a current worker's compensation certificate is required.
- Article of Incorporation (if corporate structure)**
- Additional Non-Profit Entities Portal Requirement- A Copy of your IRS Federal Tax Exemption Determine Letter.** – If not available or applicable, please explain. If working with a Fiscal sponsor, the proposer should include all of the above proposal information and a **Notarized** letter signed by the President of the Board of the fiscal sponsor agreeing to act in that capacity for the bidding organization.

Section III: Portal Requirements Cont'd

- List Board of Trustees or Board Members/Advisory Council/with affiliations for non-profits. Corporate Officers/Owners/Board Members and Titles For Profit Organizations**
- Professional or Operating Licenses**
- Equal Employment Opportunity-Affirmative Action Plan**
- Certificate of Good Standing-** A copy of a certificate of good standing from the Ohio Secretary of State, **not more than 90 days old is required**. The website to request this document is www.sos.state.oh.us. There is a \$5.00 fee for this document.
- IRS form W-9** The blank form can be obtained from IRS.gov website. The document must be printed, completed and signed. Please be sure to use the proper business entity name associated with the business EIN number per the IRS records. This is also the vendor name that the County will use to issue contract payments.
- Representatives, Assurances and Certifications document**
- Ⓢ Certification that the proposal and pricing will remain in effect for a minimum of six months from the contract submission date.**
- Other-** The organization must certify, in letter format, addressed to The Trumbull County Board of Commissioners, that it is not banned or otherwise sanctioned by the federal or state governments or any agency thereof. The SSAC, based on its accounting firm's sole analysis of the information provided, can determine that there is a reasonable expectation that the applicant can financially fulfill the terms of the contract for two years, i.e. the applicant is financially stable.

The Senior Services Advisory Council at its sole discretion, may waive or allow an applicant to remedy one or more of these issues provided there is either, 1) no competition for the particular dollars, 2) all proposers failed to meet one or more requirements or 3) evidence supports the proposer's effort to meet a requirement in a timely manner but another party, outside its control, failed to respond within the deadline.

Section IV. Contract Compliance

A. Narrative regarding Community Senior Center: Program Description of your organization and the organization's history/experience or if a new operation, the goals and plans for this operation. Please include your mission statement, strategic plan, and long term plans of sustainability. Explain the need for the proposed program with supporting evidence how this program will benefit the proposer's service area.

(1a.) Provide the organizational chart for the operations.

B. If you receive money direct from consumers for this bid service provided, please provide detail as to the agency's fee determination to the consumer and a copy of the organizational written policy for cash handling with accounting procedures for the dollars received, from start to finish (receipt of money by the drivers/service provider to deposit in proper depository bank accounts). What cash controls do you have to insure accurate collection and reporting of project income and these cost share collections? Provide documentation of such.

C. How do you market your organization's senior services or how does the consumer become aware of the senior services available by your organization? Do you post your weekly schedule/New events in the Tribune Chronicle's weekly senior community news page? Please provide a copy.

(1c.) Also provide copy of internal brochures/public disseminated material that includes wording regarding receiving funding from the Trumbull County Senior Levy dollars.

D. If you have received Senior Levy Funding for this current cycle that will be ending in 2023, please answer the following: The Trumbull County Senior Levy is a vote-supported levy. If funding was not awarded per this request, how would your organization have to adjust? Do you have long term plans to continue operations if this funding was not in place? An alternative plan other than closing is preferred especially if this center was operational prior to the senior levy.

Senior Center Questionnaire

Location of Center _____ Address _____
Phone # _____ Contact Person _____
E-Mail _____

If you answer **NO** to any of these questions, tell us how you will be able to meet these goals.

- 1) Is this location handicapped accessible? Describe:
- 2) Is there adequate parking available? Describe:
- 3) Is the Center large enough to provide group and individual activities? Describe:
- 4) Is the Center air-conditioned for year-round activities?
- 5) Have the Seniors within this location area been surveyed to determine what activities are of interest?
- 6) When and how was that survey taken? Describe the results:
- 7) If this is the first year of operation, what is the enrollment goal for the first year of operation?
- 8) Besides Senior Levy Funding, what other sources of funding do you have to support the Center?
- 9) If this is the first year of operation, prior to opening date and after, what is the intention to promote the use of the center?

Section V. Revenue/Budget per Center

COMMUNITY CENTER:

COMPLETE FOR THE EACH CENTER REQUESTING FUNDING

<u>Other Program Resources other than submitted request</u>	Cash	In-Kind	Total
1. Fees Charged for Programs			
2. Membership Fees			
3. Grants			
4. Other Resources			
5. Senior Center Local Match Required			
6. TOTAL REVENUE BUDGET OTHER THAN SENIOR LEVY			

Other Resources Revenue (Line 4)

	\$
	\$
	\$
Total Other Resources	\$

Senior Center Local Match Required (line 5)

Source of Revenue for Local Match Required (Cash)	Amount
	\$
	\$
Total (agrees to line 5 column 1)	\$

Source of Revenue for Local Match Required (In-Kind)	Amount
	\$
	\$
Total (agrees to line 5 column 2)	\$
	\$
Total Contribution (In-Kind & Cash agrees to line 5 column 3)	\$

Proposer Operating Budget Per Center Summary

Proposer:	
Date From:	To:

	Amount
I. Staff	
A. Salaries	
B. Payroll-Related Expenses	
Total Staff Costs	
II. Operations	
A. Travel and Short-Term Training	
B. Consumable Supplies	
C. Occupancy Costs	
D. Contract and Professional Services	
E. Other - Miscellaneous	
Total Operational Costs	
III. Equipment	
A. Equipment Depreciation	
B. Small Equipment Purchases	
C. Leased and Rented Equipment	
Total Equipment Costs	
Sub- Total of All Costs	
IV. Minus Revenue Budget Total-Item 6	
V. Total Program Costs	

Budget Computation

Total Program Costs (Total from Item V.)
Divided by Total Planned Programs*see note
= Unit Rate Requested (agrees to summary)

See note *

Unit Rate Requested
X number of Planned Programs
= Total Contract Amount (should agree to summary total requested)

For page 14

For page 14

For page 14

*Provide List of Programs used for calculation as well as planned offerings
 Total should agree to figure above

Daily, weekly, monthly

Schedules for figures from Operating Budget Summary from Page 25

I. A. Salaries

Position Title	Salary	Frequency (hour, week, month, annual)	% of Time to Program	Program Salary
Total Salaries				

I. B. Payroll-Related Expenses

	Amount
PERS or Social Security	
Worker's Compensation	
Unemployment Insurance	
Retirement Expenses	
Hospitalization	
Other (identify)	
Other (identify)	
Other (identify)	
Total Payroll-Related Expenses	

II. A. Travel and Short-Term Training

		Amount
Mileage Reimbursement rate per mile		
Short-Term, Training		
Total Travel and Short-Term Training		

II. B. Consumable Supplies

Type		Amount
Office Supplies		
Cleaning Supplies		
Other (identify)		
Other(identify)		
Total Consumable Supplies		

II. C. Occupancy Costs

		Amount
Rent		
Maintenance and Repairs		
Utilities if not included in rent must be itemized		
Heat		
Electric		
Water		
Telephone		
Sewer		
Garbage		
Other (identify)		
Total Occupancy Costs		

II. D. Contract & Professional Services – Consulting, System Support, Audit/Independent Accounting/Legal

		Amount
Audit/Independent Accounting		
Legal		
Liability Insurance		
Instructor Fees		
Technology		
Employee Testing		
Other (identify)		
Total Contract & Professional Services		

II. E. Other - Miscellaneous

Identify Miscellaneous Expenses		Amount
Advertising		
Dues & Subscriptions		
Miscellaneous Expense		
Other (identify)		
Other (identify)		
Other (identify)		
Other (identify)		
Total Miscellaneous Costs		

**III. A. Equipment – Submit the following information in Excel format
 Equipment Description, New or Used, Date of Purchase, Total Cost, Useful Life,
 Annual Depreciation**

III. B. Small Equipment Purchases (Costing less than \$25,000)

		Amount
Total Small Equipment Purchases		

III. C. Leased and Rented Equipment

Item		Amount
Total Leased and Rented Equipment		

Section VI. Quality of Service (PER CENTER)

A. At least one CPR certificate must be held by staff personnel at each center location. Please provide a copy of the most recent CPR certificate as held by any staff personnel. If not currently certified, certification needs to be completed within first six months of awarded contract dollars.

B. Describe Training and Orientation for new Employees:

C. List Programs that are planned to be offered with funds provided by Trumbull County:

Section VII: Service Capacity for Community Center Requesting Funds

NAME OF CENTER: _____

1.	Hours of Operation (ex. 10-2, or 9-3)	
2.	Any pending lawsuits/sanctions? If so, please provide separate documentation regarding such and the resolutions/actions taken.	
3.	TWO methods or goals would you apply to enhance/increase membership for this program year	
4.	New Programs for Next Year: Specifically, one new Program required, not in the Socialization category that will be offered for at least one month and once a week.	
5.	List programming with goals for the underserved populations in Trumbull County or programs to encourage new members with diverse backgrounds to participate at your center. Provide a narrative as to the description and monitoring of the program to show specific interest for the underserved populations of Trumbull County.	
6.	Any additional narrative regarding the unique nature of this particular center serving the immediate community as to the location of the center	