

APPENDIX XI

BIDDER CHECKLIST

Bidders are encouraged to use this checklist to assure all required proposal items/timelines have been met. The proposer is cautioned to read and become familiar with all sections of the Area Agency on Aging proposal documents. Failure to do so may result in the submission of an irregular proposal resulting in its possible rejection by the AAA. The following itemized checklist identifies various items of the proposal documents, which should be particularly examined by the proposer. Proposers should carefully review the items specified for submission in all of the RFP documents. No representation is made that the following checklist is a complete guide to every submission requirement in the RFP documents.

Minimum Requirements for a Proposal to be Considered:

- 1. Delivered by April 23, 2021, 4:30 p.m.
- 2. All copies of the proposal must be delivered in an envelope or box that is securely sealed and clearly marked on the outside with the name of the bidder.
- 3. Signed Statement of No Involvement
- 4. Signed Terms and Conditions Affidavit
- 5. Summary Information Page signed by a person authorized to bind the agency to all contractual obligations (Title Page of Service Provider Application, Section I.A.)
- 6. Signed cash and/or in-kind commitment forms that guarantee the bidder's ability to provide adequate matching funds or, lacking that, written justification for its non-submission.

Verify the following sections of the **Service Provider Application** have been properly submitted:

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|---|----------------------|
| | Initial if submitted |
| I.A. Service Provider Summary Information | _____ |
| II.A. Program Module Documents: | |
| 1. Demographics and Community Care Service System | _____ |
| 2. Consumer Identification | _____ |
| 3. Case Management Functions | _____ |
| 4. Services | _____ |
| a. Subcontract Monitoring Schedule | _____ |

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| | Initial if submitted |
| 5. Quality Assurance | _____ |
| 6. Process for Adverse Incidents, Consumer Complaints and Reducing or Terminating Services | _____ |
| 7. Reporting | _____ |
| 8. Client Confidentiality & Security | _____ |
| 9. Disaster Preparedness | _____ |
| 10. Volunteer Plan | _____ |
| 11. Organizational Chart | _____ |
| 12. Description of Service Delivery (by Service) | _____ |
| 13. Objectives and Performance Measures | _____ |
| 14. SPA Appendix | _____ |
| 15. Program Module Review Checklist | _____ |

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| II.B. Contract Module Documents: | Initial if submitted |
| 1. Personnel Allocations Worksheet | _____ |
| 2. Unit Cost Worksheet | _____ |
| 3. Supporting Budget Schedule by Program Activity | _____ |
| 4. Commitment of Cash Donation | _____ |
| 5. Commitment of In-kind Contribution of Space | _____ |
| 6. Commitment of In-Kind Contribution of Supplies | _____ |
| 7. Commitment of In-Kind Contribution of Equipment | _____ |
| 8. Commitment of In-Kind Contribution of Services | _____ |
| 9. Commitment of In-Kind Volunteer Personnel and Travel | _____ |
| 10. Availability of Documents | _____ |
| 11. Contract Module Review Checklist | _____ |

New Bidders Only - Verify that the following sections of the Organizational Capability Package have been properly submitted:

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| | Initial if submitted |
| 1. Approved Organization Chart | _____ |
| 2. Job Descriptions for all Staff involved in CCE Program | _____ |
| 3. Personnel Policies Certification Statement | _____ |
| 4. Most Recent Audited Financial Statements | _____ |
| 5. Complete Roster of Board of Directors/Corporate Officers | _____ |
| 6. Corporate Bylaws | _____ |
| 7. Articles of Incorporation | _____ |
| 8. IRS Determination Letter on Tax Exempt Status | _____ |
| 9. IRS Form 990 | _____ |
| 10. Certificate of Insurance | _____ |
| 11. Administrative Assessment Checklist (Appendix VII) | _____ |
| 12. Certification of 30 days operating funds | _____ |
| 13. Monitoring Reports | _____ |
| 14. Reference Letter | _____ |
| 15. Documentation of Experience | _____ |