APPENDIX XI

BIDDER CHECKLIST

Bidders are encouraged to use this checklist to assure all required proposal items/time lines 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 March 2, 2018 at 3:00 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 Contract 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:

		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	

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 _____

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:

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 _____