

NEW JERSEY DEPARTMENT OF HUMAN SERVICES

Division of Aging Services

Request for Proposals

**Senior Save Navigators
Education, Outreach and Application Assistance
for the NJSave Programs**

**Louise Rush
Assistant Commissioner**

January 17, 2024

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I. Purpose and Intent

Funding is available to assist the State of New Jersey Department of Human Services (DHS), Division of Aging Services (DoAS) expand enrollment in State-funded programs for older adults and individuals receiving Social Security Disability Insurance (SSDI). The funding will be provided to Provider Agencies to provide outreach and application assistance for the NJSave programs as well as to provide program education and outreach to individuals and households potentially eligible for the NJSave programs.

This Request for Proposals (RFP) is issued by DoAS and seeks bidders to provide the services described in this RFP anticipated to begin in the spring of 2024 and ending on June 30, 2025.

The following services are requested under this RFP: program outreach, education and application support to NJSave-eligible individuals. Additionally, Provider Agencies and/or their partners will aid and encourage applicants to submit supporting documentation to DoAS as required for the completion of the NJSave application and provide other application assistance, as needed.

DoAS will provide up to fifteen (15) community-based outreach grants in the amount of Four Hundred and Sixty Six Thousand (\$466,000) to qualified and successful bidders to educate, outreach and provide application assistance for NJSave-eligible individuals. Bidders must provide a budget using the provided template that includes all projected costs for start-up, education, outreach and NJSave application assistance. Please note that successful bidders must maintain expenditure documentation to be provided to DHS upon contract conclusion.

The following summarizes the anticipated RFP schedule:

January 17, 2024	Notice of Funding Availability
January 31, 2024	Deadline for submission of questions (3:00 pm)
February 28, 2024	Deadline for receipt of proposals (3:00 pm)
TBD	Preliminary grant award announcement

Bidders are responsible for monitoring the DHS website for updates to the RFP schedule.

<https://www.nj.gov/humanservices/providers/grants/rfpfi/>.

II. Background and Population to be Served

The NJSave application provides a single pathway to connect NJ older adults and individuals receiving SSDI with other programs that can assist in lowering the cost of prescriptions, Medicare, utilities, and hearing aids, and screen applicants for additional help with utilities, food, and prescriptions through other State and federal programs.

The NJSave flagship program is the Pharmaceutical Assistance for the Aged and Disabled (PAAD) program that has been offering NJ older adults prescription assistance since 1975. Due to the latest State budget, the income limits for the PAAD program were increased \$10,000

beginning January 1, 2024. This also meant a \$10,000 increase in the eligibility limits for the Senior Gold Prescription Discount Program, the Lifeline Utility Assistance Program, the Tenant Lifeline Assistance Program, and the Hearing Aid Assistance for the Aged and Disabled (HAAAD) program, all benefits available through the NJSave application.

The NJSave application also includes the three Medicare Savings Programs (MSP) that provide assistance with Medicare premiums and other Medicare costs. Additionally, the NJSave application will screen and initiate applications for the federal Low Income Subsidy (LIS) program that provides assistance with Medicare Part D premiums and cost share, and the Universal Service Fund (USF) and Low-Income Home Energy Assistance Programs (LIHEAP) administered by the NJ Department of Community Affairs that assist with energy costs, and the Supplemental Nutrition Assistance Program (SNAP) administered by the NJ Division of Family Development.

With the passage of P.L.2023, C.79, not only were the income limits raised but also funding was made available to create Senior Save Navigators to assist in making NJ older adults and individuals receiving SSDI aware of all of the benefits available to them through the NJSave application and to assist with the application process.

Eligible Applicants for NJSave

- New Jersey residents aged 65 and older who are income eligible
- New Jersey residents collecting Social Security Disability Insurance aged 18-64 who are income eligible
- Calendar year 2024 Income eligibility:
 - PAAD, Lifeline, HAAAD – single is less than \$52,142; married is less than \$59,209
 - Senior Gold – single is between \$52,142 - \$62,142; married is between \$59,209 - \$69,209
 - These programs do not have resource limits.
 - MSP – 135% FPL – must be eligible for Medicare, must meet resource limits.
- Applicants may complete the NJSave application online, paper (mail or fax), or by telephone.

DoAS is soliciting proposals from entities hereafter referred to as “Provider Agencies or organizations,” to outreach low-income older adults and individuals receiving SSDI in New Jersey to increase enrollment in NJSave programs among all eligible individuals, by assisting with the following:

- Engage older adults and individuals receiving SSDI and provide NJSave application assistance;
- Assist in creating online NJSave application accounts for applicants;
- Improve community awareness of the NJSave programs and their role in helping older adults and individuals receiving SSDI continue to live independently in their communities;
- Identify and utilize innovative and/or best practices for targeted community outreach and enrollment, including digital methods, such as social media, text and email communication;
- Expand relationships with non-governmental community organizations and develop new community partners who can help outreach and enroll older adults and individuals receiving SSDI; and
- Promote increased enrollment in underserved communities by building trust between

immigrant communities and the NJSave programs through culturally competent and language accessible outreach.

III. Who Can Apply?

To be eligible for consideration for this RFP, the applicant must satisfy the following requirements:

- The bidder may be a non-profit, for-profit, or governmental entity;
- The bidder must be in good standing with DHS if it has an existing grant or contract in place. If applicable, the bidder must have all outstanding Plans of Correction (PoC) for deficiencies submitted to DHS for approval prior to submission;
- The bidder must be fiscally viable based upon an assessment of the bidder's audited financial statements. If a bidder is determined, in DHS' sole discretion, to be insolvent or to present insolvency within the twelve (12) months after bid submission, DHS will deem the proposal ineligible for grant award;
- The bidder must not appear on the State of New Jersey Consolidated Debarment Report at <http://www.state.nj.us/treasury/revenue/debarment/debsearch.shtml> or be suspended or debarred by any other State or Federal entity from receiving funds; and
- Pursuant to DHS Contract Policy and Information Manual Policy Circular 8.05, the bidder shall not have a conflict, or the appearance of a conflict, between the private interests and the official responsibilities of a person in a position of trust. Persons in a position of trust include Provider Agency staff members, officers and Governing Board Members. A bidder must have written Conflict of Interest policies and procedures that satisfy the requirements of P8.05, thereby ensuring that paid Board members do not participate in transactions except as expressly provided in the P8.05 circular.

To be eligible for consideration for this grant opportunity, the organization must satisfy the following additional requirements:

- Must demonstrate experience with ethnically diverse target populations, including older adults and/or individuals with disabilities;
- Demonstrate at least two (2) recent years of experience providing culturally relevant and linguistically appropriate services to racially and ethnically diverse communities;
- Demonstrate relationships or potential relationships with community-based organizations, faith-based organizations, community leaders and peer leaders;
- Must have the ability to provide outreach and NJSave application assistance during the business week, as well as during weekends and evenings;
- Internet connection, landline and mobile phone, and fax capabilities are required;
- Must have the capacity to conduct outreach to the community in-person, virtually and/or over the phone on a regular basis (may attend events organized by other community or faith-based organizations, local businesses, or government agencies);
- Must have, or create, a social media presence and partnerships with other organizations that have a social media presence;
- Must have, or create, electronic newsletter distribution lists used to disseminate State-approved messaging; and

- Must have the ability to provide NJSave application assistance in languages other than English, as designated by the Division.

IV. Contract Scope of Work

Provider agencies will deliver NJSave outreach services, defined as any services which identify individuals potentially eligible for the NJSave programs. Provider agencies will: provide services which inform individuals about the NJSave programs, assist in completing NJSave applications, assist in gathering and submitting supporting documentation, and monitors the application until an eligibility determination is made.

Specifically, selected Provider Agencies will:

1. Be responsible for outreach, education and application assistance for older adults and individuals receiving SSDI, particularly underserved and hard-to-reach populations, and will present the benefits of the NJSave programs;
2. Participate in an NJSave training designed to educate and inform successful bidders on the NJSave programs and application assistance methodologies;
3. Coordinate with community-based organizations, faith-based organizations, community leaders, local governments and peer leaders to conduct community outreach and application assistance (e.g., at hospitals, schools, churches, clinics, libraries, health departments, senior centers, and community organizations.);
4. Provide opportunities to outreach consumers individually or in group settings, focusing on broad topics related to older adults, applying for programs and direct application assistance;
5. Provide end-to-end application assistance by helping individuals to complete the NJSave application as needed in any of the accepted formats (online, hard copy submitted via mail or fax, or by phone), resolving any issues such as providing documentation to obtain and maintain NJSave eligibility, and providing program members with the resources to contact DoAS for post-enrollment issues with coverage;
6. If planning to administer onsite assistance, provide a location easily accessible to public transportation for on-site assistance. Onsite assistance locations shall provide mobile computing capabilities that will facilitate access to the NJSave web portal. These locations will provide the ability to access the NJSave web portal and the ability to print, fax and mail hard copies of applications and eligibility-related documentation, as needed;
7. Deliver cultural and linguistic appropriate outreach services, including interpreter or translation services as necessary, which would achieve increased NJSave enrollment;
8. Use various marketing platforms and collateral material to promote NJSave (e.g., social media, electronic and print material). Provider Agencies must use State-approved communication tools and/or obtain DoAS approval prior to distribution of any and all education and outreach materials;
9. Provider Agencies are expected to actively participate in DoAS' Outreach and Enrollment Workgroup;
10. Provider Agencies are expected to use data provided by DoAS to contact and attempt to enroll potentially eligible individuals; and

11. Provider Agencies must submit monthly outcome reports, including:
- a) Monthly Work Plan Table (see details below);
 - b) Total number of events scheduled and attended;
 - c) Description and number of outreach engagements conducted; i.e., social media posts, communication blasts, etc.;
 - d) The total number of applications submitted, sorted by the type of application submitted (e.g. older adults, individuals with disabilities);
 - e) The total number of applications submitted, sorted by the outreach strategy used to engage the applicant(s); and
 - f) Total number of referrals to other social service programs (e.g. SHIP, AAA, Medicaid and/or SNAP).

Requirements

Responses submitted to this RFP must meet the following requirements:

- Bidders must meet the eligibility criteria;
- Full proposals are due no later than February 28, 2024 by 3:00 P.M. ET. Proposals [must be submitted via email to: doas@dhs.nj.gov](mailto:doas@dhs.nj.gov). Instructions on the content of proposals and their submittal are found below;
- Funds may be used to support collaborations between multiple organizations. Each proposal should identify the primary bidder and any other partners that will be funded by this grant, if awarded;
- Grant funds will be allocated based on organizational capacity to effectively reach prospective NJSave applicants and their ability to conduct community outreach, education and application assistance;
- Matching funds are not required but leveraged support, in the form of in-kind services, are encouraged;
- Bidders are required to identify their capacity to engage a certain number of NJSave - eligible individuals and facilitate the submission of NJSave applications for prospective NJSave members;
- Successful bidders will be required to prepare Monthly Work Plans, described in Section IV, and a final report within 30 (thirty) days of the conclusion of the contract (additional guidance will be provided to all successful bidders);
- Successful bidders will be required to participate in NJSave training; and
- As part of this application for funding, applicants may request funding only for expenses not currently funded or supported by any federal or State grants. Awards may not be used to fund activities, items or expenses funded by another grant program. Additionally, awards made under this grant program may not supplant any existing funding. For bidders with existing federal or State funding, the activities proposed for this grant program must be a separate project from any existing projects funded.

Monthly Work Plan Table

All bidders will use the table format featured as Attachment C to present an initial and prospective Work Plan for the anticipated first month of service. Thereafter, successful bidders shall submit a comprehensive monthly Work Plan that will define the bidder’s project

goals/activities, milestones and defines how the bidder envisions success will be measured.

The successful bidder must provide measurable goals and objectives for the project and explain how the project expands on any current work or creates a new system navigation model focusing on enrollment into NJSave programs.

Bidders should develop their Work Plan to focus on NJSave-related goals and activities for prospective applicant education, outreach and enrollment assistance.

Provide the names and titles of staff that will be working directly on this project by conducting outreach and providing system navigation assistance.

Provide specific information about the service area in which activities will be performed. Please include city and county information.

Describe specific education and outreach goals to assist the target population to enroll in NJSave programs.

Describe how the bidder will achieve the Work Plan goals and the measurements that will be used to ensure goals are being accomplished and milestones are being met.

Describe how the bidder will track and collect the data required for monthly reporting to DoAS.

WORK PLAN – (Time Period and Service Area)			
Goals and Activities	Milestones	Community Impact	Staff Responsible
List the actions or steps needed to achieve each goal and provide a timetable.	Specify the milestones leading to each goal, including the dates Proposer expects to reach those milestones.	Describe how Proposer will measure success.	List name and title for staff directly working on each goal. If Proposer plans to hire staff, please list the position title(s) and the expected date(s) of hire.
-----	----- Add rows	as needed -----	-----

V. General Contracting Information

All bidders will be notified in writing of the DHS’s intent to award a contract.

All successful bidders will be required to comply with the Affirmative Action requirements of N.J.S.A. 10:5- 32 et seq.; N.J.A.C. 17:27; P.L. 2005, c.51 and 271 (N.J.S.A. 19:44A-20.13 et seq. and N.J.S.A. 40A:11-51); Executive Order 117 of 2008; and N.J.S.A. 52:34-13.2, Source Disclosure Certification (replaces Executive Order 129). Source Disclosure Form and Ch. 51 Pay-to-Play Certification must be provided upon final award.

Bidders must currently meet the terms and conditions of the DHS contracting policies and procedures as set forth in Standard Language Document, the Contract Reimbursement Manual, and the Contract Policy and Information Manual. These documents are available at

<https://www.state.nj.us/humanservices/olra/contracting/policy/>.

Contract(s) awards as a result of this RFP will terminate June 30, 2025. Funds may only be used to support services that are specific to this award; hence, this funding may not be used to supplant or duplicate existing funding streams. These resources may not replace existing DoAS funding allocation.

Successful bidders shall maintain all documentation related to products, transactions or services under this contract for a period of five years from the date of final payment. Such records shall be made available to the State upon request.

In accordance with DHS Policy P1.12 available on the web at:

<https://www.state.nj.us/humanservices/olra/assets/documents/CPIManual.pdf> , funds awarded pursuant to this RFP will be kept separate from existing programs in place between the bidder and DoAS until DoAS determines, in its sole discretion, that the program is stable in terms of service provision, expenditures, and applicable revenue generation.

Should service provision be delayed through no fault of the successful bidder, funding continuation will be considered on a case-by-case basis. Should services not be rendered, any funds which have been provided pursuant to this agreement shall be returned to DoAS.

VI. Required Proposal Content

DoAS will give priority consideration to bidders with experience in delivering services to the DoAS population. Organizational capacity, regional geographic reach, and experience working with vulnerable communities will also be considered. All bidders must submit the following items:

Funding Proposal Cover Sheet (Attachment A)

All bidders must submit a written response that addresses the organization's role in outreach to older adults and individuals receiving SSDI; overview of organization's work, programs and initiatives; profile of experience with prospective applicant communities; and, capacity to implement this program.

Specific Requirements

The proposal may be submitted in narrative or outline format.

- Organizational Capacity - This can include capacity from the applicant's community partner organizations. (20 points)
 - Demonstrate experience, capacity and capability to provide services to geographically diverse communities in the communities they serve.
 - Demonstrate experience providing culturally relevant and linguistically appropriate services to ethnically diverse immigrant communities.
 - Demonstrate experience engaging with older adults and/or individuals with disabilities.
 - Demonstrate experience and capacity to perform the services detailed in the

Bidders' Qualifications and Scope of Work.

- Program Implementation Capacity (30 points)
 - Bidders must outline how they plan to assist potential applicants with completing the NJSave application, particularly applicants who lack digital access and who need language support.
 - Detailed overview of how the bidder will implement the Scope of Work's outreach and assistance activities, building upon any previous experience in this work.
 - Number of staff that will be dedicated to this project and any other additional resources that your organization has available for this project.
 - Summary of technological and telephonic resources needed to implement the program.
 - If planning on providing on-site services, a description of the physical location the on-site services would take place, including accessibility features and proximity to public transportation.
 - Experience and capacity in providing support and assistance to the prospective applicant or enrolled member support, including language access and cultural competency.
 - Proposed initial Work Plan Table for the anticipated first month of services.

- Program Outreach, Education and Support Capacity (25 points)
 - Bidders need to demonstrate their capacity and experience in managing community education and outreach, which can include engaging other community partners. Bidders are encouraged to provide a list of potential community outreach partners for this RFP.
 - Outline of experience providing services to ethnically diverse communities, including language access and cultural competency practices. Note experience with community outreach, public education, and information-sharing to immigrant communities.
 - Estimate number of people the organization could outreach in the region or communities they serve.
 - Summarize the capacity to assist NJSave applicants, answer basic NJSave questions and direct applicant questions to the appropriate source for response/assistance.
 - Summary of social media presence and engagement in the local community.

Budget (25 points) (Attachment B & Annex A)

Provide a proposed budget that clearly describes budget categories and fund allocation consistent with the organizational capacity and proposed services bidders are able to provide based on the Scope of Work. Budgets should include administrative costs, equipment and supplies, staffing, community outreach and support and service provision costs associated with this program. Please include any costs that will be allocated to partner organizations, as appropriate. Please use the Proposal template (Attachment B) and Budget Summary Template (Annex A) provided for the budget proposal.

Allowable Costs

No funds from the Senior Save Navigator grants may be used for lobbying activities as defined in accordance with guidance issued by the New Jersey Election Law Enforcement Commission at: https://www.elec.nj.gov/forcandidates/gaa_forms.htm.

Required Attachments:

The following items must be included as appendices with the bidder's proposal. Please note that if items 10-13 are not submitted, the proposal will not be considered.

1. Bidder's mission statement;
2. Organizational chart;
3. Job descriptions of key personnel;
4. Outline of staff that will be dedicated for this program if already on staff;
5. A description of all pending and in-process audits identifying the requestor, the firm's name and telephone number, and the type and scope of the audit, if applicable;
6. List of the board of directors, officers and terms;
7. Copy of documentation of the bidder's charitable registration status;
8. Disclosure of Investment in Iran (www.nj.gov/treasury/purchase/forms.shtml);
9. Current State of New Jersey Business Registration. Bidders can obtain a copy at https://www1.state.nj.us/TYTR_BRC/jsp/BRCLoginJsp.jsp; for an entity doing business with the State for the first time, it may register at <http://www.nj.gov/treasury/revenue>);
10. Department of Human Services Statement of Assurances (RFP Attachment E);
11. Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions (RFP Attachment F);
12. Statement of Bidder/Vendor Ownership Disclosure (www.nj.gov/treasury/purchase/forms.shtml);
13. Most recent single audit report (A133) or certified statements (submit two [2] copies).
14. Department of Human Services Commitment to Defend and Indemnify Form (Attachment G);
15. Any other audits performed in the last two (2) years (submit two [2] copies); and
16. Three (3) references from other agencies or organizations who have worked with you or know firsthand about your work. DHS will notify bidder prior to contacting references.

VII. Submission of Proposal Requirements

A. FORMAT AND SUBMISSION REQUIREMENTS

Attachment A includes a Proposal Cover Sheet form that is also available as a Word document, if requested, along with the attached Budget documents (Attachment B & Annex A). All proposals must include the following combined as a single PDF:

1. Completed Proposal Cover Sheet (Attachment A);
2. Proposal narrative or outline (Attachment B);
3. Proposed Work Plan Table (Attachment C);
4. Proposed Budget Summary Template (Annex A); and
5. All materials contained in the list of Appendices in Section VI;

The completed proposal package containing the Proposal Cover Sheet (Attachment A), the Proposal Template (Attachment B), the work plan table (Attachment C), the Budget Summary Template (Annex A), the Appendices outlined in Section VI, and supporting budget-related Justification documents must be combined into a single PDF document. Bidders should email the

combined, single PDF, document to doas@dhs.nj.gov no later than 3:00 P.M. ET on February 28, 2024.

B. CONFIDENTIALITY/COMMITMENT TO DEFEND

Pursuant to the New Jersey Open Public Records Act (OPRA), N.J.S.A. 47:1A-1 et seq., or the common law right to know, proposals can be released to the public in accordance with N.J.A.C. 17:12-1.2(b) and (c).

Bidder should submit a completed and signed Confidentiality/Commitment to Defend Form with the proposal. In the event that Bidder does not submit the confidentiality form with the proposal, DHS reserves the right to request that the Bidder submit the form after proposal submission.

After the opening of the proposals, all information submitted by a Bidder in response to a Bid Solicitation is considered public information notwithstanding any disclaimers to the contrary submitted by a Bidder. Proprietary, financial, security and confidential information may be exempt from public disclosure by OPRA and/or the common law when the Bidder has a good faith, legal/factual basis for such assertion.

As part of its proposal, a Bidder may request that portions of the proposal be exempt from public disclosure under OPRA and/or the common law. Bidder must provide a detailed statement clearly identifying those sections of the proposal that it claims are exempt from production, and the legal and factual basis that supports said exemption(s) as a matter of law. DHS will not honor any attempts by a Bidder to designate its price sheet, price list/catalog, and/or the entire proposal as proprietary and/or confidential, and/or to claim copyright protection for its entire proposal. If DHS does not agree with a Bidder's designation of proprietary and/or confidential information, DHS will use commercially reasonable efforts to advise the Bidder. Copyright law does not prohibit access to a record which is otherwise available under OPRA.

DHS reserves the right to make the determination as to what to disclose in response to an OPRA request. Any information that DHS determines to be exempt from disclosure under OPRA will be redacted.

In the event of any challenge to the Bidder's assertion of confidentiality that is contrary to the DHS' determination of confidentiality, the Bidder shall be solely responsible for defending its designation, but in doing so, all costs and expenses associated therewith shall be the responsibility of the Bidder. DHS assumes no such responsibility or liability.

In order not to delay consideration of the proposal or DHS' response to a request for documents, DHS requires that Bidder respond to any request regarding confidentiality markings within the timeframe designated in DHS' correspondence regarding confidentiality. If no response is received by the designated date and time, DHS will be permitted to release a copy of the proposal with DHS making the determination regarding what may be proprietary or confidential.

VIII. Review of Proposals

There will be a review process for responsive proposals. DoAS will convene a review committee of public employees to conduct a review of each responsive proposal.

The bidder is advised that the contract award may be conditional upon final contract and budget negotiation.

Additionally, if a bidder is determined, in DoAS' sole discretion, to be insolvent or to present insolvency for this project, DoAS will deem the proposal ineligible for grant award.

DoAS reserves the right to reject any and all proposals when circumstances indicate that it is in its best interest to do so. DoAS' best interests in this context include, but are not limited to, loss of funding, inability of the bidder(s) to achieve performance, an indication of misrepresentation of information and/or non-compliance with State and federal laws and regulations, existing DHS contracts, and procedures set forth in DHS Policy Circular P1.04 (<http://www.nj.gov/humanservices/olra/ocpm/resources/manuals/>).

DoAS will notify all bidders of grant awards, contingent upon the satisfactory final negotiation of awards.

IX. Appeal of Award Decisions

Appeals of any award determinations may be made only by the respondents to this RFP. All appeals must be made in writing and must be received by the DoAS at the address below no later than the date and time set on the DHS Website

<https://www.nj.gov/humanservices/providers/grants/rfpfi/>. The written request must set forth the basis for the appeal. Appeals must be emailed to Doas@dhs.nj.gov for consideration by Louise Rush, Assistant Commissioner.

Please note that all costs incurred in connection with any appeals of DoAS decisions are considered unallowable costs for purposes of DoAS contract funding. DoAS will review appeals and render final funding decisions. Awards will not be considered final until all timely appeals have been reviewed and final decisions rendered.

X. Post Award Required Documentation

Upon final award announcement, the successful bidder(s) must be prepared to submit one (1) original signed copy of each of the documents below (if not already on file), as well as any other required documents. Copies, rather than original signed documents, may be submitted only where indicated below:

1. Most recent IRS Form 990/IRS Form 1120, and Pension Form 5500 (if applicable) (submit two [2] copies);
2. Copy of the Annual Report-Charitable Organization (for information visit: <https://www.njportal.com/DOR/annualreports/>)
3. A list of all current contracts and grants as well as those for which the bidder has applied for from any Federal, State, local government or private agency during the grant term proposed herein, including awarding agency name, amount, period of performance, and purpose of the contract/grant, as well as a contact name for each award and the phone number;
4. Proof of insurance naming the State of New Jersey, Department of Human Services,

- Trenton, NJ 08625-0362 as an additional insured;
5. Board Resolution identifying the authorized staff and signatories for grant actions on behalf of the bidder, if applicable;
 6. Current Agency By-laws, if applicable;
 7. Current Personnel Manual or Employee Handbook, if applicable;
 8. Copy of Lease or Mortgage, if applicable;
 9. Certificate of Incorporation, if applicable;
 10. Co-occurring policies and procedures, if applicable;
 11. Conflict of Interest Policy;
 12. Affirmative Action Policy;
 13. Affirmative Action Certificate of Employee Information Report, newly completed AA 302 form, or a copy of Federal Letter of Approval verifying operation under a federally approved or sanctioned Affirmative Action program. (AA Certificate must be submitted within 60 days of submitting completed AA302 form to Office of Contract Compliance);
 14. A copy of all applicable licenses;
 15. Local Certificates of Occupancy;
 16. Procurement Policy;
 17. Current equipment inventory of items purchased with DHS funds (Note: the inventory shall include: a description of the item [make, model], a State identifying number or code, original date of purchase, purchase price, date of receipt, location at the successful bidder, person(s) assigned to the equipment, etc.);
 18. All subcontracts or consultant agreements related to the DHS contract signed and dated by both parties;
 19. Business Associate Agreement (BAA) for Health Insurance Portability Accountability Act of 1996 compliance, if applicable, signed and dated;
 20. Updated single audit report (A133) or certified statements, if differs from one submitted with proposal;
 21. Source Disclosure (EO129) (www.nj.gov/treasury/purchase/forms.shtml); and
 22. Chapter 51 Pay-to-Play Certification (www.nj.gov/treasury/purchase/forms.shtml).

XI. Attachments

See the following pages.

ATTACHMENT A: Funding Proposal Cover Sheet

STATE OF NEW JERSEY DEPARTMENT OF HUMAN SERVICES
Division of Aging Services

Project Title: _____

Incorporated Name of Bidder: _____

Eligibility Type (check to confirm eligibility):

_____ Non-profit bidder with IRS approved 501(c)(3) designation that can coordinate and implement social service programs including direct services and/or NJ DoAS community outreach, education and NJSave application assistance within the community, and/or have a regional or statewide presence within the target population that could benefit NJ DoAS.

Federal ID Number:

Charities Reg. Number (if applicable)

DUNS Number:

Address of Bidder:

Website of Bidder:

Bidder Organization Profile - State mission and briefly describe areas of expertise and focus:

Chief Executive Officer Name and Title:

Phone #:

E-mail Address:

Primary Contact Person Name and Title:

Phone #:

E-mail Address:

Total NJ DHS-DoAS Grant Funds Requested: _____

ATTACHMENT A continued

Incorporated Name of Bidder: _____

Geographical area served:

Brief description of organizational capacity and interest in the NJSave program:

Application partners, if applicable: (include additional sheets as necessary)

Organization Name:

Address:

Website:

Project Contact (name, e-mail address, phone #):

Authorization of the Chief Executive Officer:

(print name)

Signature: _____ **Date:** _____

ATTACHMENT B: Proposal Template and Budget Summary Template Instructions

STATE OF NEW JERSEY DEPARTMENT OF HUMAN SERVICES Proposal Template and Budget Summary Template Instructions

All bidders must submit a written response that addresses the following topics, adheres to all instructions, and includes supporting documentation as noted below:

INTRODUCTION AND CONTEXT

1. Please provide a brief summary description your organizations' role in participating in the Senior Save Navigators program. Include overview of organizational work, programs, and initiatives. (1-2 paragraphs)
2. Please provide a brief profile of experience working with communities (regionally and/or demographically) who may benefit from NJSave programs if applicable. (1-2 paragraphs). Bidders are encouraged to include the following types of information in their profile:
 - Background information on demographics within the target geography for Senior Save Navigators. This background does not need to be a highly complex analysis. This can include a simple outline of communities served, which may include but should not be limited to immigrant communities from the following geographic regions of origin: Asia/Pacific Islands, Central, South America and the Caribbean, and Africa.
 - Experience providing services to geographically diverse communities across the State. Note any interests in partnering organizations/strategic collaborators/community champions to potentially integrate into this initiative.

PROPOSAL NARRATIVE (1 - 2 pages) Address the following questions:

1. What is your experience working with the communities that may benefit from NJSave programs?
2. Have you implemented social service programs that required application assistance and supporting document collection? If so, how many clients were served.
3. Have you provided accurate information to ethnically diverse communities on public programs or initiatives? If so, how many people were reached by your efforts.
4. What is your customer service experience? Including serving clients over the phone, in person, and/or remotely?
5. How is your organization prepared to take on this project and scale up as needed for a short period of time? Please note any specific structural capacity that exists to take on this initiative, including resources for applicant support.
6. Note any partnerships with other community based organizations on this project, including outreach, education, and application support.

ATTACHMENT B Continued

STAFFING PLAN (2-3 paragraphs)

1. Briefly describe staffing capacity and plan to meet the needs of this initiative in a short period of time.
2. Please provide brief list of key members and their language access and/or cultural competency experience.
3. Note any projections for additional permanent or temporary staff for this project.

INSTRUCTIONS FOR BUDGET SUMMARY TEMPLATE (Annex A):

The Excel template, posted with the RFP, contains a template spreadsheet. Please use the following guidance.

1. In the Budget Summary tab, you will enter the proposed costs for this RFP. This should include the total from budget categories A-H.
2. In the Cost Breakdown tab, you will enter the individual information for each budget categories A-H.
3. Please use the **Narrative Justification** column to help support anything that you feel needs to be explained in written word for evaluators to understand your intent regarding any cost/volume data populated in your template submission. Please provide notes, as well as, calculations that support the data entered. If you double up expenses on one budget line, please provide the individual expense details in the budget notes.
4. You may add or expand rows to give more room in any section should you need it.

SAVE ALL YOUR WORK, REVIEW AND PREPARE TO SEND IN *PDF* FORMAT

ATTACHMENT C: Monthly Work Plan Table

Add as many rows to the Monthly Work Plan Table as needed.

Agency Name: _____ Service Area: _____ WORK PLAN: Anticipated First Month			
Goals and Activities	Milestones	Community Impact	Staff Responsible
List the actions or steps needed to achieve each goal and provide a timetable.	Specify the milestones leading to each goal, including the dates Proposer expects to reach those milestones.	Describe how Proposer will measure success.	List name and title for staff directly working on each goal. If Proposer plans to hire staff, please list the position title(s) and the expected date(s) of hire.

ATTACHMENT D: Addendum to RFP for Social Service and Training Contracts

STATE OF NEW JERSEY DEPARTMENT OF HUMAN SERVICES ADDENDUM TO REQUEST FOR PROPOSAL FOR SOCIAL SERVICE AND TRAINING CONTRACTS

Executive Order No. 189 establishes the expected standard of responsibility for all parties that enter into a contract with the State of New Jersey. All such parties must meet a standard of responsibility that assures the State and its citizens that such parties will compete and perform honestly in their dealings with the State and avoid conflicts of interest.

As used in this document, "successful bidder" means any person, firm, corporation, or other entity or representative or employee thereof that offers or proposes to provide goods or services to or performs any contract for the Department of Human Services.

In compliance with Paragraph 3 of Executive Order No. 189, no successful bidder shall pay, offer to pay, or agree to pay, either directly or indirectly, any fee, commission, compensation, gift, gratuity, or other thing of value of any kind to any State officer or employee or special State officer or employee, as defined by

N.J.S.A. 52:13D-13b and e, in the Department of the Treasury or any other agency with which such successful bidder transacts or offers or proposes to transact business, or to any member of the immediate family, as defined by N.J.S.A. 52:13D-13i, of any such officer or employee, or any partnership, firm, or corporation with which they are employed or associated, or in which such officer or employee has an interest within the meaning of N.J.S.A. 52:13D-13g.

The solicitation of any fee, commission, compensation, gift, gratuity or other thing of value by any State officer or employee or special State officer or employee from any successful bidder shall be reported in writing forthwith by the provider agency to the Attorney General and the Executive Commission on Ethical Standards.

No successful bidder may, directly or indirectly, undertake any private business, commercial or entrepreneurial relationship with, whether or not pursuant to employment, contract or other agreement, express or implied, or sell any interest in such successful bidder to, any State officer or employee or special State officer or employee having any duties or responsibilities in connection with the purchase, acquisition or sale of any property or services by or to any State agency or any instrumentality thereof, or with any person, firm or entity with which he is employed or associated or in which he has an interest within the meaning of N.J.S.A. 52:13D-13g. Any relationships subject to this provision shall be reported in writing forthwith to the Executive Commission on Ethical Standards, which may grant a waiver of this restriction upon application of the State officer or employee or special State officer or employee upon a finding that the present or proposed relationship does not present the potential, actuality or appearance of a conflict of interest.

No successful bidder shall influence, or attempt to influence or cause to be influenced, any State officer or employee or special State officer or employee in his official capacity in any

ATTACHMENT D continued

manner which might tend to impair the objectivity or independence of judgment of said officer or employee.

No successful bidder shall cause or influence, or attempt to cause or influence, any State officer or employee or special State officer or employee to use, or attempt to use, his official position to secure unwarranted privileges or advantages for the successful bidder or any other person.

The provisions cited above shall not be construed to prohibit a State officer or employee or special State officer or employee from receiving gifts from or contracting with successful bidders under the same terms and conditions as are offered or made available to members of the general public subject to any guidelines the Executive Commission on Ethical Standards may promulgate.

ATTACHMENT E: Statement of Assurances

NJ Department of Human Services Statement of Assurances

As the duly authorized Chief Executive Officer/Administrator, I am aware that submission to the Department of Human Services of the accompanying application constitutes the creation of a public document that may be made available upon request at the completion of the RFP process. This may include the application, budget, and list of applicants (bidder's list). In addition, I certify that the applicant:

- Has legal authority to apply for the funds made available under the requirements of the RFP, and has the institutional, managerial and financial capacity (including funds sufficient to pay the non-Federal/State share of project costs, as appropriate) to ensure proper planning, management and completion of the project described in this application.
- Will give the New Jersey Department of Human Services, or its authorized representatives, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with Generally Accepted Accounting Principles (GAAP). Will give proper notice to the independent auditor that DHS will rely upon the fiscal year end audit report to demonstrate compliance with the terms of the contract.
- Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain. This means that the applicant did not have any involvement in the preparation of the RFP, including development of specifications, requirements, statement of works, or the evaluation of the RFP applications/bids.
- Will comply with all federal and State statutes and regulations relating to non-discrimination. These include but are not limited to: 1) Title VI of the Civil Rights Act of 1964 (P.L. 88- 352;34 CFR Part 100) which prohibits discrimination based on race, color or national origin; 2) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794; 34 CFR Part 104), which prohibits discrimination based on handicaps and the Americans with Disabilities Act (ADA), 42 U.S.C. 12101 et seq.; 3) Age Discrimination Act of 1975, as amended (42 U.S.C. 6101 et. seq.; 45 CFR part 90), which prohibits discrimination on the basis of age; 4) P.L. 2975, Chapter 127, of the State of New Jersey (N.J.S.A. 10:5-31 et. seq.) and associated executive orders pertaining to affirmative action and non-discrimination on public contracts; 5) federal Equal Employment Opportunities Act; and 6) Affirmative Action Requirements of PL 1975 c. 127 (NJAC 17:27).
- Will comply with all applicable federal and State laws and regulations.
- Will comply with the Davis-Bacon Act, 40 U.S.C. 276a-276a-5 (29 CFR 5.5) and the New Jersey Prevailing Wage Act, N.J.S.A. 34:11-56.27 et seq. and all regulations pertaining thereto.

ATTACHMENT E continued

- Is in compliance, for all contracts in excess of \$100,000, with the Byrd Anti-Lobbying amendment, incorporated at Title 31 U.S.C. 1352. This certification extends to all lower tier subcontracts as well.
- Has included a statement of explanation regarding any and all involvement in any litigation, criminal or civil.
- Has signed the certification in compliance with federal Executive Orders 12549 and 12689 and State Executive Order 34 and is not presently debarred, proposed for debarment, declared ineligible, or voluntarily excluded. The applicant will have signed certifications on file for all subcontracted funds.
- Understands that this successful bidder is an independent, private employer with all the rights and obligations of such, and is not a political subdivision of the Department of Human Services.
- Understands that unresolved monies owed the Department and/or the State of New Jersey may preclude the receipt of this award.

Applicant Organization

Signature: CEO or Equivalent

Date

Typed: Name and Title

ATTACHMENT F

Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions

READ THE ATTACHED INSTRUCTIONS BEFORE SIGNING THIS CERTIFICATION. THE INSTRUCTIONS ARE AN INTEGRAL PART OF THE CERTIFICATION.

Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions

1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by a Federal department or agency.
2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name and Title of Authorized Representative

Signature

Date

This certification is required by the regulations implementing Executive order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510.

ATTACHMENT F continued

Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions Instructions for Certification

1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of facts upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to whom this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or had become erroneous by reason of changed circumstances.
4. The terms covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded, as used in this clause, have the meaning set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this proposal that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-- Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, ineligible, or voluntarily excluded from covered transactions, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded from Federal Procurement and Non-Procurement Programs.

ATTACHMENT F continued

8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

Attachment G – Commitment to Defend and Indemnify Form

Department of Human Services Commitment to Defend and Indemnify Form

I, _____, on behalf of _____ (“Company”) agree that the Company will defend, and cooperate in the defense of, any action against the State of New Jersey (“State”) or the New Jersey Department of Human Services (“DHS”) arising from, or related to, the non-disclosure, due to the Company’s request, of documents submitted to the State of New Jersey and DHS, and relating to the Request for Proposals for the Senior Save Navigators- Education, Outreach and Application Assistance for NJSave program (“RFP”), which may become the subject of a request for government records under the New Jersey Open Public Records Act, N.J.S.A. 47:1A-1 et seq. (“OPRA”). The Company agrees to indemnify and hold harmless the State and DHS against any judgments, costs, or attorney’s fees assessed against the State of New Jersey or DHS in connection with any action arising from, or related to, the non-disclosure, due to the Company’s request, of documents submitted to the State and DHS, and relating to the RFP, which may become the subject of a request for government records under OPRA.

The Company makes the foregoing agreement with the understanding that the State and DHS may immediately disclose any documents withheld without further notice if the Company ceases to cooperate in the defense of any action against the State arising from or related to the above-described non-disclosure due to the Company’s request.

I further certify that I am legally authorized to make this commitment and thus commit the Company to said defense.

(Signature)

(Print Name)

Title

Entity Represented

Date

Attachment H - Mandatory Equal Employment Opportunity Language

MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE

N.J.S.A. 10:5-31 et seq. (P.L. 1975, C. 127)

N.J.A.C. 17:27

GOODS, PROFESSIONAL SERVICE AND GENERAL SERVICE CONTRACTS

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex. Except with respect to affectional or sexual orientation and gender identity or expression, the contractor will ensure that equal employment opportunity is afforded to such applicants in recruitment and employment, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, affection-al or sexual orientation, gender identity or expression, disability, nationality or sex. Such equal employment opportunity shall include, but not be limited to the following: employment, up-grading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprentice-ship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this nondiscrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex.

The contractor or subcontractor will send to each labor union, with which it has a collective bargaining agreement, a notice, to be provided by the agency contracting officer, advising the labor union of the contractor's commitments under this chapter and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to N.J.S.A. 10:5-31 et seq., as amended and supplemented from time to time and the Americans with Disabilities Act. The contractor or subcontractor agrees to make good faith efforts to meet targeted county employment goals established in accordance with N.J.A.C. 17:27-5.2.

The contractor or subcontractor agrees to inform in writing its appropriate recruitment agencies including, but not limited to, employment agencies, placement bureaus, colleges, universities, and labor unions, that it does not discriminate on the basis of age, race, creed, col-or, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job related testing, as established by the statutes and court decisions of the State of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

In conforming with the targeted employment goals, the contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and layoff to ensure that all such actions are taken without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality or sex, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

The contractor shall submit to the public agency, after notification of award but prior to execution of a goods and services contract, one of the following three documents:

Letter of Federal Affirmative Action Plan Approval;

Certificate of Employee Information Report; or

Employee Information Report Form AA-302 (electronically provided by the Division through the Division's website at: http://www.state.nj.us/treasury/contract_compliance).

The contractor and its subcontractors shall furnish such reports or other documents to the Division of Purchase & Property, CCAU, EEO Monitoring Program as may be requested by the office from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Division of Purchase & Property, CCAU, EEO Monitoring Program for conducting a compliance investigation pursuant to N.J.A.C. 17:27-1.1 et seq.