Request for Proposals

Services to Older Refugees Program

Release Date: 7/8/2024

Submission Deadline: 8/23/2024

Part A. Summary Information

I. Introduction

The Bureau of Refugee Services (BRS) of the New York State Office of Temporary and Disability Assistance (OTDA) issues this Request for Proposals (RFP) to solicit applications from qualified applicants. The purpose of this RFP is to provide assistance to older refugees aged 60 and above for the purpose of accessing available mainstream aging services in their communities.

OTDA/BRS anticipates distributing $2,743,075 in Services to Older Refugees Program (SORP) funds for 60-month contracts under this procurement. All program funds allocated for the administration of the program are received from the federal Office of Refugee Resettlement (ORR) and subject to continued availability and State appropriation thereof. Use of these funds must relate to the provision of activities that support integration and wellness for older refugees. Other costs, such as construction and renovation costs, are not allowable under this program.

NOTE: For the purpose of this RFP, eligible persons as defined in Part A, Section VIII. Eligible Participants will hereafter be referred to as "refugees" unless special circumstances apply.

If selected, the proposal and all parts of it submitted in response to this RFP may become part of a contract with OTDA, subject to approval by the New York State Attorney General and the Office of the State Comptroller. At the time of contract development, awardees will be required to submit additional performance-based budgets, program information and any revised Minority and Women-Owned Business Enterprise (M/WBE) forms and documents for the final contract. Successful grantees will be required to submit all final contract documents, narratives and budgets into the Statewide Financial System (SFS). OTDA reserves the right to:

- Negotiate any aspect of a proposal other than rates of payment in order to ensure that the final agreement meets OTDA objectives and requirements.
- Waive procedural technicalities, or modify minor irregularities, in proposals received, after notification to the bidder involved
- Correct arithmetic errors in any proposal, or make typographical corrections to a proposal, with concurrence of the bidder.

II. Registration and Prequalification Requirements

Pursuant to the New York State Division of Budget Bulletin H-1032 (revised), dated January 9, 2024, New York State has instituted key reform initiatives to the grant contract process which require not-for-profits to register in the Statewide Financial System (SFS) and complete the Vendor Prequalification process in order for proposals to be evaluated. Information on these initiatives can be found at the NYS Grants Management website.

Below is a summary of the steps that must be completed to meet registration and prequalification requirements. Additional information on prequalification can be found at https://grantsmanagement.ny.gov/get-prequalified.

Register for the Statewide Financial System

Applicants must be registered in SFS to compete for New York State grants and are strongly encouraged to begin the process as soon as possible in order to participate in this opportunity. Complete instructions on how to register in SFS are available here.

In addition to the support resources available to SFS users on the SFS website in the SFS Coach Training section, such as manuals, videos, webinars, and FAQs, SFS provides live help desk support for SFS users.

- Hours: Monday – Friday 8:00 a.m. to 5:00 p.m.
- Phone: (518) 457-7737 or (877) 737-4185
- Email: helpdesk@sfs.ny.gov

Not-for-profit organizations must prequalify to do business with New York State agencies before they can compete for State grants. The process allows not-for-profit organizations to address questions and concerns prior to entering a competitive bid process. Not-for-profit organizations are strongly encouraged to begin the prequalification process as soon as possible.

To become prequalified, a not-for-profit organization must first register in SFS. Once registered, not-for-profit organizations complete an online prequalification application. This includes completing a series of forms by answering basic questions regarding the organization and uploading key organizational documents. Complete instructions on how to prequalify are found here.

Grant proposals received from not-for-profit applicants that are not prequalified in SFS at the application due date and time will not be evaluated. Such proposals will be disqualified from further consideration.

Specific questions about the prequalification process should be referred to your agency representative or to the SFS help desk at helpdesk@sfs.ny.gov.

III. Procurement Schedule/Submission Guidelines

OTDA reserves the right to modify the dates in this RFP.

- Release Date of the Request for Proposals: 7/8/2024
- Deadline for Written Questions: 7/22/2024
- Response to Questions: 8/5/2024
- Due Date and Time for Proposals: 2:00 PM on 8/23/2024
- Anticipated Notification of Awards: 10/23/2024
- Anticipated Contract Start Date: 1/1/2025

Questions and Answers Regarding this Request for Proposals

Prospective applicants may submit questions via email to BRS.RFP@otda.ny.gov. Be sure to reference the SORP RFP in the subject. Questions must be submitted no later than 7/22/2024.

Questions and answers will be posted on OTDA's website on the Contracts and Grants Opportunities web page by 8/5/2024.

OTDA reserves the right to respond to questions submitted after the deadline.

Proposal Submittal

Applications must be submitted electronically via the SFS Vendor Portal by 2:00 PM on 8/23/2024. Once the deadline has passed, SFS will no longer accept applications. Applicants are strongly encouraged to complete the electronic application submission process several days before the application due date to ensure the application is successfully accepted by SFS.

IV. Federal Authority

The federal Office of Refugee Resettlement (ORR) is authorized to fund the Services to Older Refugees Program opportunity pursuant to §412(c)(1)(A) of the Immigration and Nationality Act (INA), 8 U.S.C.§1522(c)(1)(A), as amended. The Services to Older Refugees Program is found under Catalog of Federal Domestic Assistance (CFDA), No. 93.566, of the Department of Health and Human Services (DHHS) program title, Refugee and Entrant Assistance Discretionary Grants. ORR Policy Letter 22-08 defines SORP's goals, eligible populations, reporting and monitoring. ORR Dear Colleague Letter 24-06 classifies SORP as a Support Services Set-Aside within the federal fiscal year 2024 (FFY24) Refugee Support Services (RSS) formula allocation.

Services to refugees must be provided in accordance with 45 C.F.R. Part 400 including, but not limited to, §400.154 Employability Services, §400.155 Other Services, and §400.152 (b) Time limitation.

More information can be found at the following websites:

https://www.acf.hhs.gov/orr/resource/services-for-older-refugees-program

http://www.acf.hhs.gov/programs/orr/resource/federal-guidance-and-authority

V. Program Description

The purpose of SORP is to provide activities that support integration and wellness for older refugees, including gaining access to mainstream services within their respective communities so that they may live independently for a longer period of time. An additional program goal is to help older refugees to become naturalized United States (US) citizens, so that they may receive federal benefits such as Supplemental Security Income (SSI). Awardees under this program will be required to implement comprehensive programs that pursue the following five objectives:

- Helping older refugees access mainstream aging services in the community by establishing or expanding working relationships with state or local agencies on aging.
- Coordinating and providing older refugees with appropriate services, including those that are not available in the community.
- Creating opportunities that enable older refugees to live independently as long as possible.
- Developing opportunities for older refugees to connect with their communities to avoid isolation.
- Assisting older refugees on the path to citizenship by taking a comprehensive approach that incorporates all of the various pathways to citizenship that an older refugee may utilize.

Background

New York's Aging Refugee Population

There is a sizable population of older persons in New York State of which refugees make up only a small percentage. The majority of refugees resettled in New York State over the past five years are from Afghanistan, the Democratic Republic of Congo, Burma, Ukraine and Syria. Although the refugees have resettled from various countries, many experience similar obstacles. They may be unfamiliar with services that are available through local service providers such as the local Office for the Aging because they are new to the US or may have difficulty accessing services due to language and cultural barriers.

Many of the issues that older refugees face are very similar to those experienced by domestic individuals 60 years of age and older. However, the needs of the older refugee population sometimes go unmet due to the additional barriers experienced by this population. For example, written mainstream services information and outreach materials are not always available in languages spoken by the older refugees making it difficult for them to know what exists in their communities. Conversely, local service providers may have little working knowledge of the unique needs of the older refugee population or may not be equipped to provide services in the languages spoken by the local refugee population.

Additionally, older refugees often present with the following issues:

- Inability to advocate for themselves due to language and cultural barriers;
- Loneliness and depression;
- Lack of reliable support systems such as relatives;
- Difficulty speaking and learning English;
- Trouble obtaining or using transportation;
- Reluctance to participate in activities within the local community;
- Difficulty purchasing food and/or preparing meals;
- Medical needs that have gone untreated prior to, during, or after their arrival in the US;
- Lack of planning for both short- and long-term health care;
- Inability to perform daily living activities;
- Lack of awareness of mainstream services that are available;
- Limited access to entitlements and/or public benefits; and
- Risk of losing or loss of SSI and/or other federal benefits due to Social Security Administration (SSA) time limits on eligibility due to immigration status.

VI. Eligible Grant Applicants

Only proposals submitted by Eligible Grant Applicants, as defined below, will be accepted for review. Proposals submitted by ineligible applicants will not be reviewed.

Eligible applicants include non-governmental organizations: nonprofit corporations, including charitable organizations incorporated, registered and in good standing with the Charities Bureau of the Attorney General in the State of New York; faith-based organizations and educational institutions.

Eligible applicants must be prequalified in SFS as outlined in Part A, Section II. Registration and Prequalification Requirements.

Eligible applicants must be located in and do business in New York State.

VII. Service Strategy

The Services to Older Refugees Program will consist of the following deliverables:

- Cross Training
- Community Education Workshops
- Socialization and Community Engagement
- Assessment
- Case Management Services
- Services to Older Refugees Five-Years Post Arrival

A SORP Provider (Contractor) will be responsible for providing comprehensive case management to SORP participants (Participants) and collaborating with other local service providers to ensure that these Participants are receiving the services needed to live independently in their homes and communities.

Successful Services to Older Refugee Programs have the capacity to (1) engage the refugee communities most in need of services; and (2) ensure that outreach and case management services are provided in a culturally and linguistically appropriate manner.

Cross Training

Cross Training is the collaboration between a Contractor and other relevant agencies or service providers, whereby awareness about older refugees is brought to the attention of other local service providers. Capacity building between the agencies then occurs in order to effectively serve older refugees in a culturally and linguistically appropriate manner.

Cross Training encourages and provides a structure for regular and frequent collaboration between these agencies. The ongoing communication between the agencies will result in the increased capacity of the community to identify and serve older refugees, thereby meeting the needs of this vulnerable and underserved population.

SORP Cross Trainings are not limited to aging network service providers. For example, a valid Cross Training could be a meeting between a Contractor and a local office for neurology, whereby the Contractor helps to educate the medical staff on how to complete the USCIS N-648 Form (Medical Certification for Disability Exceptions). Medical staff could benefit from training that helps them to explain the nature and extent of an applicant's medical condition and how it relates to their inability to comply with the educational requirements for naturalization.

Cross Trainings should be meetings initiated for the sole purpose of SORP. OTDA requires that a minimum of six Cross Trainings will occur on an annual basis, and at least one Cross Training per year must be held with the local Office for the Aging in the county where a Participant is receiving services in order to effectively coordinate with existing aging services infrastructure and make mainstream aging services more accessible to Participants.

Community Education Workshops

Community Education Workshops are hosted by a Contractor with the assistance of other local service providers, in the primary languages of the target population to educate older refugees about the resources available locally. These workshops are an avenue to disseminate informational resources that have been translated and may serve as the first step in identifying older refugees who are not currently receiving SORP services, in order to schedule intake appointments to assess their needs and determine eligibility.

Additionally, Contractors will facilitate workshops for domestic senior groups that provide general information regarding senior refugees in their community, such as their various countries of origin, what necessitated that they leave their homes, what refugee camps they lived in, languages they speak, cuisines they prefer and common health issues that they may suffer from. These experiences in workshops will help to address misconceptions that domestic seniors may have about their refugee peers and help to integrate the two communities.

Community Education Workshops will be hosted at venues convenient to the target population. For example, they may be hosted at a refugee service provider site, the local Office for the Aging, English as a New Language (ENL) classes, senior nutrition sites or public libraries.

Community Education Workshops should be gatherings initiated for the sole purpose of SORP. Participants must be offered transportation and interpretation in their preferred language at Community Education Workshops (unless the target audience is domestic seniors) in order to ensure that all barriers to attending Community Education Workshops have been removed for all Participants. OTDA requires that a minimum of four Community Education Workshops will occur on an annual basis, and at least one per year must be on the topic of US naturalization and the naturalization assistance services that are available to Participants.

Socialization and Community Engagement

For many older refugees, social isolation is a problem due to linguistic, transportation and cultural barriers. A Contractor will use SORP funds to create and facilitate opportunities for older refugees to participate in social activities and enhance civic participation consistent with Executive Order 190 (EO 190), such as naturalization assistance classes, bingo, performing arts, yoga, sports lessons and events, opportunities to volunteer, card games, crafts, bus trips to ball games, senior community centers and local markets, museums and parks. A Contractor may also connect older refugee populations with local volunteers who help people find their way to these types of activities within the local community.

Wherever possible, Contractors will endeavor to create opportunities for domestic seniors and senior refugees in the community to connect and interact with one another. Contractors are encouraged to convene Socialization and Community Engagement activities that both groups are invited to, with adequate interpretation services made available in order to facilitate conversation and cultural exchange amongst the various parties.

Assessment

Assessment comprises determining the scope of needs of the older refugee, developing a plan of action to meet those needs and preparing a Case Management Plan which will include all of the services that are initially planned for the older refugee. The Assessment deliverable is a pre-requisite to the Case Management Services deliverable and is comprised of three separate tasks. In order to claim an Assessment deliverable, the Contractor must 1.) schedule intake and determine eligibility of an eligible participant, 2.) assess the current needs of the Participant and 3.) create a Case Management Plan to address those identified needs. Following Assessment, a Contractor will provide Case Management Services and update and adjust the Participant's Case Management Plan as needed.

Recognizing that the needs of a Participant may change significantly in a short period of time, a Contractor after conducting the initial assessment may provide up to four additional Assessment deliverables to an individual during the 60-month contract term. These additional Assessments will only be performed when a significant life-changing event occurs in the life of the Participant (e.g., the Participant suffers a stroke).

Case Management Services

Following Assessment, a Contractor must manage the older refugee's progress and assist them to address the needs identified in the Case Management Plan by providing Case Management Services. Case management is a multi-step process to ensure access to and coordination of mainstream senior services, in order to promote and support self-sufficiency and independence for as long as possible. This process may include the provision of services directly by a Contractor or referrals and facilitated engagement in programs and/or services from an outside state agency for identified service needs. Additionally, as services are provided, a Contractor must update and adjust the Case Management Plan accordingly. This allows for service delivery that is built upon objective presenting needs, input from the older refugee and adaptation to changing circumstances. All services provided must address needs that have been documented in the Case Management Plan.

Bilingual staff or interpreters will assist with Case Management Services as needed. OTDA expects a Contractor to assess the older refugee's needs and provide services and/or referrals in the following categories:

- Housing Assistance
- Public Benefits Application Assistance
- Medical/Mental Health Care and Counseling
- Supportive Services
- Legal Services
- Food and Nutritional Assistance
- Naturalization Assistance
- Other Identified Service Needs as approved by OTDA

Housing Assistance

A Contractor must have the experience and ability to provide housing assistance to older refugees which may include services such as eviction and homelessness prevention; assistance with finding affordable and/or accessible housing; and assistance with long term care placement. A Contractor may need to assist older refugees in securing or maintaining safe housing and/or living arrangements that help to promote their ability to live independently for a longer period of time consistent with EO 190 and the World Health Organization's "Eight Domains of Livability."

Public Benefits Application Assistance

Older refugees may be eligible for public benefits and may need information and assistance in applying for benefit. A Contractor should be prepared to assist all eligible Participants in obtaining the benefits for which they are eligible and ensuring that they maintain their eligibility for important benefits such as Supplemental Nutrition Assistance Program (SNAP), Medicaid and Supplemental Security Income (SSI).

Medical/Mental Health Care and Counseling

There are many different kinds of health services that are available and essential to the aging population in New York State. A Contractor must have the ability to provide or connect older refugees with these services in order to address health concerns, provide education and promote a healthy lifestyle and disease prevention.

Consistent with EO 190, types of services may include routine health screening; physical fitness programs; mental health screening and counseling services; medications management screening and education; and chronic disease self-management education programs.

Supportive Services

Supportive Services are designed to support and empower older refugees to be as independent as possible for as long as possible through advocacy on behalf of them and their families/caregivers by a Contractor. Consistent with EO 190, Supportive Services may include participation in intergenerational activities; arranging for home care; adult day care; respite care; nursing home ombudsman services; transportation; interpretation; translation; and elder abuse prevention.

Legal Services

Many older refugees are unaccustomed to the laws and their legal rights and responsibilities in the US and/or cannot afford the costs of legal assistance to address particular legal issues or problems. In accordance with 45 CFR Part 400.155 (i) Contractors may provide application assistance for adjustment to legal permanent resident status. For Participants that require additional legal assistance, Contractors should provide them with referrals to outside legal services providers. OTDA expects a Contractor to comply with all applicable statutes, regulations and ethics opinions governing immigrant consultants and the authorized practice of law.

Food and Nutritional Assistance

Older refugees may be unfamiliar with how to obtain and/or prepare meals in the US, or they are unable to prepare meals for themselves and do not have a caregiver to assist them. A Contractor should provide access to and education about food and nutrition to older refugees by providing services such as arranging for congregate nutrition services (community dining); meal delivery for homebound Participants; grocery store orientation; assistance accessing community food pantries; and nutrition education and counseling.

Naturalization Assistance

Naturalization Assistance is essential for refugees who have lost or are at risk of losing SSI and other federal benefits. Contractors must create an Individual Naturalization Plan for every SORP client wishing to become a naturalized US citizen. The Individual Naturalization Plan should incorporate all available pathways to become a US citizen as described in 8 USC §1423, including the USCIS 50/20, 55/15 and 65/20 English language exemptions, as well as comprehensive Case Management Services to help Participants obtain N-648 Medical Certification for Disability Exceptions waivers if they may have a valid disability.

Towards this end, an Individual Naturalization Plan form should be completed with the Participant during a Naturalization Assistance counseling session. The Individual Naturalization Plan form in conjunction with the counseling session should act as a diagnostic tool to determine the best pathway towards citizenship for each Participant and will both guide and track the Participant's progress towards achieving their naturalization goal.

Allowable Naturalization Assistance activities include Naturalization Assistance counseling sessions; English as a New Language (ENL)/Civics instruction specifically tailored to older refugees to help them prepare for the English and/or US history and civics portions of the naturalization test; application completion for the forms N-400, N-648, and I-912 and any other applicable forms or waivers; and the provision of interpreter services for the US citizenship interview. SORP funds may not be used for naturalization application fees.

Other Identified Service Needs

A Contractor may request approval from OTDA to provide any other specific services not listed.

Services to Older Refugees Five-Years Post Arrival

Participants that are in the US (or in status) for 61-months or longer are only able to receive Services to Older Refugees Five-Years Post Arrival services. The Assessment and Case Management Services deliverables may not be claimed for an older refugee who has resided in the US for longer than 60 months.

Services to Older Refugees Five-Years Post Arrival - Naturalization Assistance

Contractors must provide all of the services listed above in "Case Management Services – Naturalization Assistance" for all Services to Older Refugees Five-Years Post Arrival clients that would like to become a naturalized US citizen. Along with Interpretation and Translation Services, Naturalization Assistance is the only direct service that may be provided to Services to Older Refugees Five-Years Post Arrival Participants. In contrast to the "Case Management Services – Naturalization Assistance" deliverable, the Individual Naturalization Plan that is drafted for Services to Older Refugees Five-Years Post Arrival Participants will serve as a de facto Case Management Plan and will be updated and adjusted as needed to meet the needs of the Participant as they pursue their goal of US naturalization.

Services to Older Refugees Five-Years Post Arrival - Interpretation and Translation Services

An Interpretation and Translation Services to Older Refugees Five-Years Post Arrival deliverable may be claimed when the Contractor has provided such services through the course of supporting Participants in the following areas: Housing Assistance; Public Benefits Application Assistance; Medical/Mental Health Care and Counseling; Supportive Services; Legal Services; Food and Nutritional Assistance; Other Identified Service Needs as approved by OTDA.

Services to Older Refugees Five-Years Post Arrival - Referrals

A referral to an outside agency under Services to Older Refugees Five-Years Post Arrival may be claimed only when the Participant has accepted the referral and commenced the service. Case notes documenting the Services to Older Refugees Five-Years Post Arrival referral must contain enough detail to demonstrate that the Participant accepted and commenced the service.

VIII. Eligible Participants

In the event of federal regulation changes that affect the program eligibility, contractors will be notified of the change and required to comply with the new criteria for participant eligibility. When Participants become naturalized US citizens, they will no longer be eligible for SORP. SORP funds must be used for services for persons who are eligible based on their immigration status, age and length of stay in the United States or length of time in status, as follows:

Eligible Immigration Status

1. Individuals paroled as refugees or asylees under § 212(d)(5) of the Immigration and Nationality Act (INA);
2. Refugees admitted under § 207 of the INA;
3. Asylees whose status was granted under § 208 of the INA;
4. Cuban and Haitian entrants, in accordance with the requirements in 45 CFR § 401.2
    a. Any individual granted parole status as a Cuban/Haitian Entrant (Status Pending) or granted any other special status subsequently established under the immigration laws for nationals of Cuba or Haiti, regardless of the status of the individual at the time assistance or services are provided;

b. A national of Cuba or Haiti who was paroled into the United States and has not acquired any other status under the INA and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;

c. A national of Cuba or Haiti who is the subject of removal, deportation or exclusion proceedings under the INA and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;

d. A national of Cuba or Haiti who has an application for asylum pending with DHS/USCIS or Department of Justice (DOJ)/EOIR and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;

5. Victims of a severe form of trafficking in persons per the Victims of Trafficking and Violence Protection Act of 2000, Pub. L. No. 106-386, as amended, 22 U.S.C. § 7105(b) (1) (A) and (C);

6. Lawful permanent residents provided the individuals previously held one of the statuses identified above (Note that this does not refer to Amerasians who are admitted as lawful permanent residents, or to Iraqi and Afghan Special Immigrants. See #7 and #8 below.);

7. Certain Amerasians from Vietnam who are admitted to the United States as immigrants pursuant to § 584 of the Foreign Operations, Export Financing, and Related Programs Appropriations Act, 1988 (as contained in § 101(e) of Public Law 100-202), as amended (8 U.S.C. § 1101 note);

8. Iraqi and Afghan Special Immigrants per section 1244(g) of Div. A of Pub. L. 110-181, as amended (8 U.S.C. § 1157 note) and section 602(b) (8) of Div. F of Pub. L. 111-8, as amended (8 U.S.C. § 1101 note);

9. Afghan individuals with SI/SQ Parole (aka Afghan Special Immigrant Parolee);

10. Afghan individuals with Special Immigrant Conditional Permanent Residence (SI CPR);

11. Citizens or nationals of Afghanistan paroled into the United States under section 212(d)(5) of the Immigration and Nationality Act between July 31, 2021, and September 30, 2023;

12. A spouse, as defined in section 101(b) of the INA (8 U.S.C. 1101(b)), of any Afghan humanitarian parolee described above, who is paroled into the United States after September 30, 2023;

13. Ukrainian Humanitarian Parolees:

    a. Citizens or nationals of Ukraine who the Department of Homeland Security (DHS) has paroled into the United States between February 24, 2022, and September 30, 2024, due to urgent humanitarian reasons or for significant public benefit, known as Ukrainian Humanitarian Parolees (UHPs);

    b. Non-Ukrainian individuals who last habitually resided in Ukraine, who DHS has paroled into the United States between February 24, 2022, and September 30, 2024, due to urgent humanitarian reasons or for significant public benefit;

    c. A spouse of an individual described in section 13(a) or 13(b) of this paragraph who is paroled into the United States after September 30, 2023;

    d. A parent, legal guardian, or primary caregiver of an unaccompanied refugee minor or an unaccompanied child described in section 13(a) or 13(b) of this paragraph who is paroled into the United States after September 30, 2023.

Eligibility Period

For Participants with the eligible immigration statuses described in numbers 1 through 13 above, or as notified by OTDA of additional eligibility criteria for authorized participants, services may be provided to those who have been in the US for up to 60 months (five years) from the date of arrival or from the date the eligible immigration status is granted. With the exception of the "Services to Older Refugees Five-Years Post-Arrival" deliverable, eligibility for services will expire on the last day of the 60th month following:

- The refugee's date of arrival into the United States;
- The date that asylum status is granted to an asylee;
- The date that a trafficking victim is certified by the Office of Refugee Resettlement or the date that status is granted to the certain family members of the certified trafficking victim; or
- The date that a parolee was granted parole.
- For Participants with the eligible immigration statuses described in 9 and 10, please see ORR Policy Letter PL 22-01 for information on the eligibility period for those statuses.
- For Participants with the eligible immigration statuses described in 13, please see ORR Policy Letter PL 22-13 for information on the eligibility period for those statuses.

Age

Refugees must be 60 years of age or older in order to be eligible to receive services.

Residency Requirements

Eligible Participants are required to be residents of New York State regardless of county.

IX. Funding Limitations and Provisions

Available Funds

Awards for the first budget period of SORP will be made from OTDA's federal fiscal year (FFY) 2024 Refugee Support Services (RSS), Services to Older Refugees set-aside allocation of $348,615, plus $1,000,000 of FFY 2023 Additional Ukraine Supplemental Appropriations Act (AUSAA) RSS Base Funds. Anticipated allocations and subsequent budget periods are subject to continued availability of federal funds and state appropriation of the funds thereof. OTDA reserves the right to increase or decrease funding for the program subject to availability of federal funds. Only federal funds designated for SORP or federal funds authorized for such use are available through this RFP. It is estimated that $1,348,615 will be available for the first budget period and OTDA intends to award five contracts of approximately $269,723, however it is not anticipated that SORP funding will continue at such a level during the entire contract term.

Distribution of Funds

Initial contract awards to successful applicants and the corresponding award for Budget Period 1 are the result of this competitive procurement. During the contract term, however, subsequent budget period awards will be based on available funding, continuing need and satisfactory Contractor performance, as evidenced by voucher claims and program monitoring.

Contract Term and Budget Periods

This RFP governs the provision of funds for the anticipated 60-month contract term from January 1, 2025, to December 31, 2029.

During the course of the contract, funds will be made available to the Contractor for each pre-established budget period. A 12-month Attachment B-2 Performance-Based Budget Worksheet will be required from the Contractor for each budget period. OTDA anticipates that there will be five budget periods within the contract term:

- Budget Period I: January 1, 2025, to December 31, 2025
- Budget Period II: January 1, 2026, to December 31, 2026
- Budget Period III: January 1, 2027, to December 31, 2027
- Budget Period IV: January 1, 2028, to December 31, 2028
- Budget Period V: January 1, 2029, to December 31, 2029

X. Program Information

Performance Based Contracts

Contracts resulting from this procurement will be performance-based. Under this contract, Contractors are not reimbursed for line-item expenses. Compensation is directly tied to the completion of documented deliverables. Documentation of the provision of a “task” (service) or number of tasks to a Participant allows a Contractor to claim an achieved deliverable. The Contractor is paid for the deliverables at the established rate, as defined in the contract.

Payment for deliverables are derived from unit rates proposed in each application. The applicant’s award request is calculated by multiplying the rates for each deliverable by the units to be achieved per deliverable.

Contractors' performance data, along with allocation data such as award amounts, contract periods, program sites, service locations and spending information may be posted on OTDA’s web site as required.

Payment Rates

The following chart provides the maximum rates OTDA will reimburse per Deliverable achieved by participants under this RFP. The maximum rates have been determined using historical data for the same or similar services and were adjusted using the Consumer Price Index (CPI) to reflect increased costs for goods and services in 2025. Applicants must propose rates that do not exceed the maximum rates listed.

Deliverable	Maximum Rate
Cross Training	$700
Community Education Workshop	$1,800
Socialization and Community Engagement	$700
Assessment	$350
Case Management Services	$700

Deliverable	Maximum Rate
Services to Older Refugees Five Years Post-Arrival	$700

The applicant must propose rates for deliverables that do not exceed the maximum allowable rates.

Deliverables, Definitions, Allowable Services and Documentation

The parameters and documentation requirements of each deliverable are provided in the following chart. The applicant should use this information to project service levels and allocate funds to each deliverable.

In the event of federal statutory, rule, regulation, policy, guidance or programmatic changes that affect the deliverables in the chart below, Contractors will be notified of the change(s) and required to comply with the new requirements.

Deliverable	Objective	Requirements	Documentation Required
Cross Training (CT) *CT is a non-Participant specific deliverable* *A minimum of six (6) CT per year are required, and one (1) CT per year must be held with the local Office for the Aging*	The Contractor meets with other relevant agencies or service providers to develop and increase capacity resulting in more collaboration to benefit older refugees	Completing the required task allows the Contractor to claim one (1) **CT** deliverable Required Task: • Conduct a Cross Training meeting as described in the approved Work Plan of the contract	• A copy of the agenda and a summary of the meeting • A sign-in sheet that includes the date, time and location of the meeting, and the name(s) of the person(s) conducting and attending the meeting
Community Education Workshop (CEW) *CEW is a non-Participant specific deliverable* *A minimum of four (4) CEW are required per*	The Contractor conducts workshops that target older refugees and/or domestic senior groups which: • Promote awareness in refugee communities of services offered by a Contractor and other relevant service providers or informs these communities of	Completing the required task allows the Contractor to claim one (1) **CEW** deliverable Required Task: • Conduct a Community Education Workshop as described in the approved Work Plan of the contract	• A copy of the agenda and a summary of the workshop • A sign-in sheet that includes the date, time and location of the workshop, and the name(s) of the person(s) conducting and attending the workshop

Deliverable	**Objective**	**Requirements**	**Documentation Required**
year, with at least one devoted to the topic of US naturalization	important information and/or • Promote cultural awareness about senior refugees amongst the domestic senior community or the aging services network		
Socialization and Community Engagement (SCE) SCE *is a non-Participant specific deliverable*	The Contractor conducts activities which involve Participants in courses, workshops, other learning activities and opportunities for engagement in the community and cultural activities, consistent with EO 190	Completing the required tasks allows the Contractor to claim one (1) **SCE** deliverable Required Task: • Conduct a Socialization and Community Engagement activity as described in the approved Work Plan of the contract	• A copy of the agenda and a summary of the activity • A sign-in sheet that includes the date, time and location of the activity, and the name(s) of the person(s) conducting and attending the activity
Assessment *Assessment is a Participant-specific deliverable* *The Assessment deliverable is a pre-requisite to the Case Management Services deliverable* *Five (5) Assessment deliverables per participant may*	The Contractor meets with the prospective Participant to determine program eligibility and assess their needs. Then in conjunction with the Participant, the Contractor creates a Case Management Plan	Providing the required tasks allows the Contractor to claim one (1) **Assessment** deliverable Required Tasks: • Schedule intake and determine eligibility of an eligible Participant • Conduct an assessment of needs • Create a Case Management Plan	• Proof of Immigration status • An "Application for Services," signed and dated by both the Participant and agency representative once the application is complete and prior to services being provided. The agency supervisor must also sign and date the application within 30-days of the Participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier

Deliverable	Objective	Requirements	Documentation Required
be claimed per contract term			• Case Management Plan • Corresponding case note documentation
Case Management Services (CMS) CMS *is a Participant-specific deliverable* *The number of CMS deliverables per participant is unlimited*	The Contractor manages the Participant's progress throughout the service provision process, updates and adjusts the Case Management Plan as needed and provides any and all services in the Case Management Plan	Providing the required tasks allows the Contractor to claim one (1) **CMS** deliverable Required Tasks: • Provide a service or a referral within one of the following categories: ○ Housing Assistance ○ Public Benefits Application Assistance ○ Medical/Mental Health Care and Counseling ○ Supportive Services ○ Legal Services ○ Food and Nutritional Assistance ○ Naturalization Assistance ○ Other Identified Service Needs as approved by OTDA • Update and adjust the Case Management Plan	• Case note documentation of tasks and/or referrals provided to the Participant and any other such documentation as required by OTDA

Deliverable	Objective	Requirements	Documentation Required
Services to Older Refugees Five-Years Post Arrival (SOR5YPA) SOR5YPA *is a Participant-specific deliverable* *The number of* SOR5YPA *deliverables per participant is unlimited*	The Contractor assists a Participant who has been in the United States 61-months or longer to access services	Providing the required task below allows the Contractor to claim one **SOR5YPA** deliverable Required Task: • Provide a service or a referral within one of the following categories: ○ Interpretation and Translation ○ Naturalization Assistance ○ Referral	• Proof of Immigration status • An "Application for Services," signed and dated by both the Participant and agency representative once the application is complete and prior to services being provided. The agency supervisor must also sign and date the application within 30-days of the Participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier • Case note documentation of tasks and/or referrals provided to the Participant and any other such documentation as required by OTDA

Additional Deliverable Information

- All references to the “Contractor” in the deliverable definitions refer to the Contractor or subcontractor.

- The Contractor must provide all deliverables.

- Case note documentation includes a record of all Participant engagement in allowable tasks from intake to discharge. This includes a statement indicating the final disposition of the Participant’s enrollment in the program. For instance: “Did the Participant voluntarily withdraw?” or “Has the program met all of the Participant’s needs?”

- Translation is defined as the act or process of converting written words from one language into their complete, accurate and intended meaning in another language resulting in a written document in the other language.

- Interpretation is defined as oral translation for parties conversing in different languages.

- The Assessment deliverable is a pre-requisite to providing any allowable tasks under Case Management Services.

XI. Selection Process

Evaluation Process

Each proposal will be read and scored by at least two reviewers from OTDA. Proposals will be reviewed in accordance with the evaluation criteria referenced below. Scores will be averaged, and the average scores will be ranked from highest to lowest. More than one proposal to provide services in a particular impacted area, as defined in the Award Methodology below, will be reviewed competitively with other proposals to provide services in that impacted area. For example, Erie County applications will be compared only with other Erie County applications.

Regardless of score, OTDA reserves the right to fund or not fund an application based on other relevant information, such as the occurrence of SORP funds supplanting existing funds, an applicant's financial position, an applicant's prequalification status in SFS, vendor responsibility determination and the status of the applicant's NYS Office of the Attorney General Charities Registration filing.

OTDA reserves the right to conduct site visits and solicit the opinion of applicants' other funding sources prior to making a funding decision.

Evaluation Criteria

OTDA will select Contractors based on several considerations. The points assigned are reflective of the importance of each item as it relates to the total technical score.

- Pre-submission Uploads (5 points)

  Applicants will be rated on their ability to correctly complete and submit all required pre-submission uploads, as detailed in Part B, Section II. Attachments

- Program Specific Questions (70 Points)

  See Part D, Section I. Printed Version of Program Specific Questions for a list of Program Specific Questions.

- Budget (25 points)

  Proposals will be rated based on the budget period one funds requested divided by the proposed number of Case Management Services units and Services to Older Refugees Five-Years Post Arrival units.

Award Methodology

The five projects will be selected from the following six impacted areas: Erie, Monroe, Onondaga, Oneida and Albany counties, and New York City (5 boroughs). A maximum of one award will be made per impacted area. For instance, if OTDA receives applications from all six of these areas, the highest scoring applicant will be selected, the next highest scoring applicant from a different area will be selected and the next highest scoring applicant from a third different area will be selected, etc.

OTDA intends to award the available funds evenly amongst the five awardees until the Budget Period 1 funding allocation is exhausted.

Awards may be reduced or increased based on availability, to provide statewide coverage and to address State priorities and needs.

If, after making awards, there is a balance of available funding, BRS may proportionally award the balance to the awardee(s) based on the requested amount.

BRS reserves the right to increase an award in order to distribute the entire funding allocation.

Initial contract awards to successful applicants and the corresponding award for the first budget period are the result of this competitive procurement.

During the contract term, however, subsequent budget period awards may be based on one or more of the following factors:

- Available funding;
- State needs and priorities;
- Demographic data; and
- Satisfactory contractor performance, as evidenced by voucher claims and program monitoring.

When making subsequent budget period awards, OTDA reserves the right to do any of the following:

- Reallocate funding from contractor to contractor;
- Suspend a budget period award to an underperforming contractor;
- Award a lesser budget period award to an underperforming contractor and reallocate the funds to a satisfactory or over performing contractor(s); or
- Adjust budget period awards to further the State's priorities and needs.

Maintenance of Effort

Funds awarded through SORP must be used by an applicant for a new service or a quantifiable increase in the level of service above that provided during the immediately previous twelve-month period. This provision prohibits using SORP funds to replace existing government or non-profit funding of services. However, once a new or increased level of service meets the above standards, SORP funds may be used to continue funding that service in subsequent years.

XII. Award Procedures

It is the policy of OTDA to provide all program Applicants with an opportunity to resolve complaints or inquiries related to bid solicitations or pending contract awards administratively. OTDA encourages all Applicants to seek resolution of complaints concerning the contract award process through consultation with OTDA. All such matters will be accorded impartial and timely consideration. Detailed procedures are provided on the OTDA website at Contracts & Grant Opportunities. OTDA continues to encourage all successful or unsuccessful applicants who desire a debriefing to contact the OTDA directly.

An appeal may be requested by following the protest procedures established by the Office of the State Comptroller (OSC). These procedures can be found in the OSC Guide to Financial Operations at http://www.osc.state.ny.us/agencies/guide/MyWebHelp. Go to Chapter XI Procurement and Contract Management, 17. Protest Procedures for further information.

Contract Development Process

OTDA will begin the contract development process with successful applicants when the awards are announced. The successful applicants may be asked to provide updated work plans and performance-based budget worksheets that specify the services to be delivered, project goals, deliverables and the claiming process. Successful applicants will be asked to provide current proof of NYS Worker's Compensation and Disability Insurance before the contract is executed. The contract will include standard terms and conditions such as confidentiality of records, publications and contract termination. The contract will constitute a legal agreement between the selected applicant and OTDA and will be in effect for the full period of the contract term.

The contracts will have a term of 60 months and will contain work plans reflecting goals for a 60-month period and a budget summary for each 12-month budget period.

Payment

The Contractor will not be reimbursed for line-item expenses. Under performance-based contracts, the Contractor will be paid for achieving specified deliverables described herein. Payment will be made only for deliverables for which outcomes are documented and for which vouchers are submitted by the required due date.

No payments will be made until the contract is fully executed and signed by the State Comptroller and the State Attorney General. Once the contract has been fully executed by OTDA (signed and approved by OTDA, the State Attorney General and the Office of the State Comptroller), OTDA may, at its discretion, advance up to 25 percent of the first budget period amount, if requested and if deemed appropriate by OTDA. There will be no advances for subsequent budget periods. Contractors will work at their own risk if they conduct program activities before the contract is executed.

XIII. Reports and Record Keeping

Record Keeping

The Contractor must maintain current and accurate fiscal and accounting controls to support the claims for deliverables claimed under the contract. Records must adequately identify revenue sources and expense items for all contract activities. Accounting records must be supported by clear documentation for all funds received and disbursed. Records must be retained and be accessible for a period of six years from the end of the contract or last payment or last contract transaction.

However, if any claim, audit, litigation, or State/Federal investigation is commenced before the expiration of the aforementioned record retention period, the records must be retained by the Contractor until all claims or findings regarding the records are finally resolved. OTDA or its designee shall have access to any records relevant to the project (including but not limited to books, documents, photographs, correspondence, and records), for audits, examinations, transcripts and excerpts. If OTDA determines that such records possess long-term or historic value, they must be transferred, upon request, to OTDA.

If the Contractor expends $750,000 or more in Federal funds during any one fiscal year, the Contractor will be subject to the Audit Requirements and provisions of OMB Super Circular, found in Federal regulations at 2 CFR Part 200 (Subparts A – F) - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; and, all other audit requirements determined applicable by the OTDA. The audit shall be completed on an annual basis and the audit report submitted within the earlier of 30 days after receipt of the auditor's report(s), or nine months after the end of the audit period, unless a longer period is agreed to in advance by the OTDA. The audit shall be conducted in accordance with generally accepted government auditing standards by an independent auditor and submitted in a form determined by the OTDA. The OTDA will report its findings and any recommendations to the Contractor and may impose any sanctions as determined appropriate.

Reporting and Vouchering Requirements

The BRS Information Network (BIN) is the required method to be used by contractors to report individual participant data and contract performance, and to prepare claims for payment. The contractor must have sufficient equipment and a system environment to use the BIN system, as follows:

- Desktop or laptop computer(s) with internet access;
- Web browsers Microsoft Edge and Google Chrome. These are free and can be downloaded from their respective websites; and
- Internet service.

The contractor must use BIN and maintain the confidentiality and privacy of data submitted through BIN in conformity with the obligations more fully spelled out in the handbook which can be found here.

A participant's service history with any OTDA contractor will be made available to contractor/subcontractor intake staff to assist in data collection and in determining the potential for payment for service Deliverables for the participant. Individuals who will be authorized to access BIN, or who will otherwise have access to Protected Information, as that term is defined in contract Attachment A-1, will be required to sign the standard Non-Disclosure Agreement (NDA), which is available for review in SFS. Applicants are encouraged to review the Master Contract for Grants, all Attachments thereto, and the NDA prior to submitting a proposal.

Reports and vouchers must be submitted by the contractor on a quarterly basis during the contract term, unless otherwise specified. Payments will be based on vouchers and any necessary documents that support the Deliverables in the expenditure-based budget summary. Additional reporting, as may be determined by OTDA, may also be required.

After the end of a contract quarter, the contractor must generate from BIN voucher forms with the payment claims amount for contractor review and subsequent submission to OTDA for payment. In addition to BIN generated reports, backup documentation must be maintained on site by the contractor and must be accessible for review by OTDA at any time.

BIN generates the Claim for Payment, Program Service Report, and Comprehensive Program Report, all of which must be submitted to OTDA on a quarterly basis.

Final reports and vouchers, known as "close-out" vouchers, are due within 60 days after the completion of, or termination of, the contract.

BIN provides contractors and subcontractors access to individual participant Application for Services, Family Self-Sufficiency Plan, Individual Service Plan and 6 and 12-month Follow-up screens for the purposes of screening and enrolling applicants, establishing financial targets for employment Outcomes (if applicable), and developing service plans.

Dates of Service in BIN should be consistent with the actual service dates, as noted in the detailed case notes in client case files, as required.

The contractor must enter performance information into BIN as participant Deliverables are achieved. The contractor may review and approve subcontractor's performance information in the BIN system.

Case Records

The Contractor must adhere to OTDA instructions regarding case records as stated in the contract and in related OTDA manuals, directives and other forms of notification. The dates of service recorded in BIN must be consistent with the actual service dates recorded in the case record.

Monitoring

OTDA will monitor projects on a regular basis throughout the life of the contract. Monitoring may include site visits, regular telephone contact and/or discussions of monthly progress reports. The goals of project monitoring are to determine whether the terms of the contract are being met and to provide technical assistance, where necessary, to help the Contractor meet these terms. OTDA reserves the right to conduct site visits and make telephone contact to subcontractors as a means of monitoring the prime Contractor's performance.

Monitoring activities will concentrate on proper documentation of claims in the Contractor's case records for each Participant or service claimed. Selected Contractors are expected to provide services consistent with the goals of this program. OTDA will monitor services provided for enrolled Participants to assess the extent to which services provided are necessary and appropriate.

Amendments to The Contract

Amendments and modifications of executed contracts are sometimes necessary to accommodate the needs of both the Contractor and OTDA. These changes, which must be by mutual written agreement, may include modification to reimbursement schedules, time and money amendments, or no-cost extensions as necessary. Contract modifications, including amendments and no-cost time extensions, will be made at the discretion of the OTDA with the approval of the Attorney General and the Office of the State Comptroller.

XIV. General Terms and Conditions

This RFP does not commit OTDA to award any contracts or to pay the costs incurred in the preparation of a response to this RFP, or to amend any contract for services.

OTDA reserves the right to amend, modify or withdraw this RFP and to reject any proposals submitted, and may exercise such right at any time without notice and without liability to any applicant or other parties for any expenses incurred in the preparation of a proposal. OTDA reserves the right to accept or reject any or all proposals that do not completely conform to the requirements or instructions given in the RFP, including time frames for submission thereof.

OTDA reserves the right to award contract(s) to as many or as few applicants as it may select.

OTDA reserves the right to conduct contract negotiations with the next responsible bidder, should the agency be unsuccessful in negotiating with the selected bidder.

Submission of a proposal will be deemed to be the consent of the applicant to any inquiry made by OTDA of third parties with regard to the applicant's experience or other matters deemed by OTDA to be relevant to the proposal. OTDA reserves the right to request and consider additional information from any applicant beyond that presented in the initial proposal. The award of the contract, if any, may be made with reliance on additional information requested. Such information may include budget justification, program information, operation details, personnel information, or other funding source information.

OTDA reserves the right to seek clarifications and revisions of proposals and to require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of an offeror's proposal and/or to determine an offeror's compliance with the requirements of the solicitation.

OTDA reserves the right to use proposal information obtained through site visits, management interviews and the State's investigation of a bidder's qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the agency's request for clarifying information in the course of evaluation and/or selection under the RFP. OTDA reserves the right to use any and all ideas submitted in the proposals received. Funds awarded for this project shall be used only for the conduct of the project as approved.

If additional funding becomes available, OTDA reserves the right to redistribute among any or all of the contract awardees and/or subsequently reconsider eligible proposals submitted in response to this RFP at that time, using the same scoring criteria and award methodology in lieu of releasing a new RFP, if deemed to be in the best interest of the State. Updated information may be requested as deemed necessary by OTDA. OTDA also reserves the right to issue a new RFP to solicit new proposals.

OTDA reserves the right to terminate in whole or in part or modify the contract at its discretion or due to the unavailability of funds. Such termination shall not affect obligations incurred under the contract prior to the effective date of such termination.

When funds are advanced any unexpended balance or funds unaccounted for at the end of the approved period or at the time of termination must be returned.

Any contract awarded pursuant to this RFP will be subject to the Office's processing procedures for contracts of this type, including approval as to form by the State's Attorney General and by the NYS Office of the State Comptroller.

It is the policy of OTDA to encourage the employment of qualified applicants/recipients of public assistance by both public organizations and private enterprises that are under contractual agreement with OTDA for the provision of goods and services. OTDA may require the Contractor to demonstrate how the Contractor has complied or will comply with the aforesaid policy.

Subject to the availability of funds, the contract award will be made to the applicants whose proposals are determined to best meet the criteria for proposal evaluation and selection set forth in this RFP.

OTDA reserves the right to award contract(s) to as many or as few applicants as it may select, and to reject all proposals that do not conform to the requirements of the RFP.

OTDA reserves the right to reject any or all proposals received in response to the RFP. OTDA reserves the right to make an award under the RFP in whole or in part.

This RFP and any contract resulting from this RFP is subject to all applicable laws, rules, regulations, policies, guidance, and programmatic requirements promulgated by any Federal and State authority having jurisdiction over the subject matter thereof.

The Contractor will be required to comply with all applicable Federal and State laws, regulations, policies, guidance and programmatic requirements. The Contractor must also comply with applicable New York State Executive Orders.

The terms and conditions for all funded projects are specified in a detailed contract which must be signed by OTDA and approved by the New York State Attorney General Office and the Office of the State Comptroller before any work is to begin or payments are made. The successful applicant will be sent the complete standard contract for execution. Before submitting the application, the Applicant is encouraged to review sections of the contract that are available to download from SFS.

The proposal of the successful applicant will serve as the basis for the contract, the terms of which will be modified within the context of this RFP. The following will be incorporated into any contracts resulting from this RFP:

- NYS Master Contract for Grants Face Page;
- NYS Master Contract for Grants (Terms and Conditions);
- Appendix A (Standard Clauses For New York State Contracts)
- Attachment A-1 (Agency-specific Terms and Conditions);
- Attachment A-2 (Program-specific Terms and Conditions);
- Attachment A-3 (Federally Funded Grants and Requirements Mandated by Federal Laws);
- Attachment B-2 (Performance-Based Budget);
- Attachment C (Work Plan); and
- Attachment D (Payment and Reporting Schedule).

Applicants must review the Attachments, as successful applicants will be expected to comply with the terms and conditions specified therein. These Attachments will become a part of any contract that is developed with successful applicants as a result of this RFP.

All plans and working documents prepared by the applicant under the contract to be awarded will become the property of the State of New York. OTDA reserves the right to use any and all ideas submitted in the proposals received.

All products, deliverable items and working papers resulting from this contract will be the sole property of OTDA and the applicant is prohibited from releasing these documents to any persons other than the Commissioner of the Office of Temporary and Disability Assistance or their designee unless authorized by OTDA to do so.

All reports of investigations, studies and publications made as a result of this proposal must acknowledge the support provided by OTDA.

All protected information, as that term is defined in Attachment A-1, concerning individuals served or studies conducted under the project are confidential and such information may not be disclosed to unauthorized persons, corporations, or agencies.

OTDA reserves a royalty free non-exclusive license to use and to authorize others to use all copyrighted material resulting from this project.

Successful applicants will be subject to the State's prompt contracting law.

The proposal shall be signed by an official authorized to bind the applicant and shall contain a statement to the effect that the proposal is a firm offer for a 180-day period. The proposal shall also provide the name, title, address, telephone number and area code of individuals with authority to negotiate and contractually bind the corporation or municipality and who may be contacted during the period of proposal evaluation.

XV. Participation Opportunities for New York State Certified Service-Disabled Veteran-Owned Businesses

Article 17-B of the New York State Executive Law provides for more meaningful participation in public procurement by certified Service-Disabled Veteran-Owned Businesses ("SDVOBs"), thereby further integrating such businesses into New York State's economy. The OTDA recognizes the need to promote the employment of service-disabled veterans and to ensure that certified service-disabled veteran-owned businesses have opportunities for maximum feasible participation in the performance of OTDA contracts.

In recognition of the service and sacrifices made by service-disabled veterans and in recognition of their economic activity in doing business in New York State, Bidders/Contractors are strongly encouraged and expected to consider SDVOBs in the fulfillment of the requirements of the Contract. Such participation may be as subcontractors or suppliers, as protégés, or in other partnering or supporting roles.

For purposes of this procurement, OTDA conducted a comprehensive search and determined that the Contract does not offer sufficient opportunities to set specific goals for participation by SDVOBs as subcontractors, service providers and suppliers to the Contractor. Nevertheless, the Bidder/Contractor is encouraged to make good faith efforts to promote and assist in the participation of SDVOBs on the Contract for the provision of services and materials. The directory of New York State Certified SDVOBs can be viewed at: https://ogs.ny.gov/veterans/.

The Bidder/Contractor is encouraged to contact the Office of General Services' Division of Service-Disabled Veteran's Business Development at 518-474-2015 or VeteransDevelopment@ogs.ny.gov to discuss methods of maximizing participation by SDVOBs on the Contract.

XVI. Executive Order No. 190: Incorporating Health Across All Policies into State Agency Activities

Per Executive Order 190, this RFP incorporates the New York State Prevention Agenda and the World Health Organization (WHO) Eight Domains of Livability to further the Health Across All Policies initiative. The New York State Prevention Agenda is the blueprint for action to improve the health of New Yorkers and become the healthiest state for people of all ages. The five priority areas of the New York State Prevention Agenda are:

- Preventing Chronic Diseases
- Promoting a Healthy and Safe Environment
- Promoting Healthy Women, Infants and Children
- Promoting Well-Being and Preventing Mental Health and Substance Use Disorders
- Preventing Communicable Diseases

The WHO Eight Domains of Livability include:

1. Outdoor Spaces and Buildings
   - Providing safe, accessible places for the public to gather indoors and out. Ensuring that parks, sidewalks, safe streets, outdoor seating, and accessible buildings can be used and enjoyed by people of all ages.
2. Transportation

- Increasing the accessibility, availability, and affordability of public transit options, as well as ensuring safe roadways

3. Housing
   - Expanding affordable housing options for varying life stages, and enacting programs that help people remain in their homes longer to age in place.
4. Social Participation
   - Increasing access to affordable and community-based social activities can help address loneliness and isolation.
5. Respect and Social Inclusion
   - Increasing the availability of intergenerational activities and programs.
6. Civic Participation and Employment
   - Provide ways that all people, including older people, can, if they choose to, work for pay, volunteer their skills, and be actively engaged in community life.
7. Communication and Information
   - Providing information through a variety of means and in a culturally competent manner, recognizing that not everyone has a smartphone or internet access.
8. Community and Health Services
   - Ensuring accessible and affordable health services in every community.

The Health Across All Policies initiative is a collaborative approach that integrates health considerations into policymaking across all sectors to improve community health and wellness. To successfully improve the health of all communities, health improvement strategies must target social determinants of health and other complex factors that are often the responsibility of non-health partners such as housing, transportation, education, environment, parks, and economic development.

Consistent with Executive Order 190, where requested in this RFP, applicants must describe how their proposals can improve community health and wellness through alignment and coordination with the New York State Prevention Agenda priorities and the WHO Eight Domains of Livability.

XVII. Contractor Requirements and Procedures for Business Participation Opportunities for New York State Certified Minority- and Women-Owned Business Enterprises and Equal Employment Opportunities for Minority Group Members and Women

Pursuant to New York State Executive Law Article 15-A and Parts 140-145 of Title 5 of the New York Codes, Rules and Regulations OTDA is required to promote opportunities for the maximum feasible participation of New York State-certified Minority and Women-owned Business Enterprises (“MWBEs”) and the employment of minority group members and women in the performance of OTDA contracts.

Business Participation Opportunities for MWBEs

For purposes of this solicitation, OTDA hereby establishes an overall goal of 30% for MWBE participation, 15% percent for New York State-certified Minority-owned Business Enterprise ("MBE") participation and 15% percent for New York State-certified Women-owned Business Enterprise ("WBE") participation (based on the current availability of MBEs and WBEs). A contractor ("Contractor") on any contract resulting from this procurement ("Contract") must document its good faith efforts to provide meaningful participation by MWBEs as subcontractors and suppliers in the performance of the Contract. To that end, by submitting a response to this RFP, the respondent agrees that OTDA may withhold payment pursuant to any Contract awarded as a result of this RFP pending receipt of the required MWBE documentation. The directory of MWBEs can be viewed at: https://ny.newnycontracts.com. For guidance on how OTDA will evaluate a Contractor's "good faith efforts," refer to 5 NYCRR § 142.8.

The respondent understands that only sums paid to MWBEs for the performance of a commercially useful function, as that term is defined in 5 NYCRR § 140.1, may be applied towards the achievement of the applicable MWBE participation goal. [FOR CONSTRUCTION CONTRACTS – The portion of a contract with an MWBE serving as a supplier that shall be deemed to represent the commercially useful function performed by the MWBE shall be 60 percent of the total value of the contract. The portion of a contract with an MWBE serving as a broker that shall be deemed to represent the commercially useful function performed by the MWBE shall be the monetary value for fees, or the markup percentage, charged by the MWBE]. [FOR ALL OTHER CONTRACTS - The portion of a contract with an MWBE serving as a broker that shall be deemed to represent the commercially useful function performed by the MWBE shall be 25 percent of the total value of the contract]

In accordance with 5 NYCRR § 142.13, the respondent further acknowledges that if it is found to have willfully and intentionally failed to comply with the MWBE participation goals set forth in a Contract resulting from this RFP, such finding constitutes a breach of contract and OTDA may withhold payment as liquidated damages.

Such liquidated damages shall be calculated as an amount equaling the difference between: (1) all sums identified for payment to MWBEs had the Contractor achieved the contractual MWBE goals; and (2) all sums actually paid to MWBEs for work performed or materials supplied under the Contract.

By submitting a bid or proposal, a respondent agrees to demonstrate its good faith efforts to achieve the applicable MWBE participation goals by submitting evidence thereof through the New York State Contract System ("NYSCS"), which can be viewed at https://ny.newnycontracts.com, provided, however, that a respondent may arrange to provide such evidence via a non-electronic method by contacting the Contract's program manager at OTDA.

Additionally, a respondent will be required to submit the following documents and information as evidence of compliance with the foregoing:

- An MWBE Utilization Plan with their bid or proposal. Any modifications or changes to an accepted MWBE Utilization Plan after the Contract award and during the term of the Contract must be reported on a revised MWBE Utilization Plan and submitted to OTDA for review and approval.

OTDA will review the submitted MWBE Utilization Plan and advise the respondent of OTDA acceptance or issue a notice of deficiency within 30 days of receipt.

- If a notice of deficiency is issued, the respondent will be required to respond to the notice of deficiency within seven (7) business days of receipt by submitting to the OTDA a written remedy in response to the notice of deficiency. If the written remedy that is submitted is not timely or is found by OTDA to be inadequate, OTDA shall notify the respondent and direct the respondent to submit, within five (5) business days, a request for a partial or total waiver of MWBE participation goals. Failure to file the waiver form in a timely manner may be grounds for disqualification of the bid or proposal.

OTDA may disqualify a respondent as being non-responsive under the following circumstances:

- If a respondent fails to submit an MWBE Utilization Plan;
- If a respondent fails to submit a written remedy to a notice of deficiency;
- If a respondent fails to submit a request for waiver; or
- If OTDA determines that the respondent has failed to document good faith efforts.

The successful respondent will be required to attempt to utilize, in good faith, any MBE or WBE identified within its MWBE Utilization Plan, during the performance of the Contract. Requests for a partial or total waiver of established goal requirements made subsequent to Contract Award may be made at any time during the term of the Contract to OTDA but must be made no later than prior to the submission of a request for final payment on the Contract.

The successful respondent will be required to submit a quarterly M/WBE Contractor Compliance & Payment Report to OTDA, by the 8th day following each end of quarter over the term of the Contract documenting the progress made toward achievement of the MWBE goals of the Contract.

Equal Employment Opportunity Requirements

By submission of a bid or proposal in response to this solicitation, the respondent agrees with all of the terms and conditions of [Appendix A – Standard Clauses for All New York State Contracts including Clause 12 - Equal Employment Opportunities for Minorities and Women OR Authority equivalent to Appendix A]. The respondent is required to ensure that it and any subcontractors awarded a subcontract for the construction, demolition, replacement, major repair, renovation, planning or design of real property and improvements thereon (the "Work"), except where the Work is for the beneficial use of the respondent, undertake or continue programs to ensure that minority group members and women are afforded equal employment opportunities without discrimination because of race, creed, color, national origin, sex, age, disability or marital status. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation. This requirement does not apply to: (i) work, goods, or services unrelated to the Contract; or (ii) employment outside New York State.

The respondent will be required to submit a Minority and Women-owned Business Enterprise and Equal Employment Opportunity Policy Statement, Form OTDA-4970, to OTDA with its bid or proposal.

If awarded a Contract, respondent shall submit a Workforce Utilization Report, Form OTDA-4971, and shall require each of its Subcontractors to submit a Workforce Utilization Report, in such format as shall be required by OTDA on a QUARTERLY basis during the term of the Contract.

Further, pursuant to Article 15 of the Executive Law (the “Human Rights Law”), all other State and Federal statutory and constitutional non-discrimination provisions, the Contractor and sub-contractors will not discriminate against any employee or applicant for employment because of race, creed (religion), color, sex, national origin, sexual orientation, military status, age, disability, predisposing genetic characteristic, marital status or domestic violence victim status, and shall also follow the requirements of the Human Rights Law with regard to non-discrimination on the basis of prior criminal conviction and prior arrest.

Please Note: Failure to comply with the foregoing requirements may result in a finding of non-responsiveness, non-responsibility and/or a breach of the Contract, leading to the withholding of funds, suspension or termination of the Contract or such other actions or enforcement proceedings as allowed by the Contract.

Part B – Instructions for Completing the Application

Please read Part A of this RFP carefully before beginning the application and be sure to read and follow all provided instructions and/or manuals while completing the screens and submitting the application in SFS. In SFS, the application is often referred to as the "bid response."

I. Searching for the Bid Event in SFS

For more detailed instructions please refer to pages 76-96 of the "SFS Handbook: Grantee Processing in SFS" for additional detailed instructions on responding to bid events and completing the application:

- Log into the SFS Vendor Portal.
- Click the "Grant Management" tile.
- Click the "Bid Event Search" tile.
- Select the "Search by Status" field drop-down list, click "Available" from the list and click the "Search" button.
- Select the appropriate Grant Opportunity and then click the "Bid on Event" button.
- From the Event Details page you may review the Event Start, Event End Date, Estimated Award Date and Anticipated Contract Date fields.
- Click the "Additional Bid Info" link and review the Additional Bid Info, then click "OK" to return to the Event Details page.
- Select the "Events Comments and Attachments" link, located at the bottom of the page to view any instructions, attachments and/or comments. You may need to scroll to see this link.

II. Attachments

- Click on the "Events Comments and Attachments" link at the bottom of the screen and you will then see a list of all the required attachments. Click the "View" button to view and download attachments as necessary. Many of these documents will be completed and then uploaded in the Event Questions section of the bid response.

  ***Be sure to download, complete and upload all of the required attachments, because SFS will not alert you if you forget an upload.**

- List of attachments:
  - Instructions -
    - Instructions for Completing the Application
    - SFS Handbook: Grantee Processing in SFS
  - Contract Documents -
    - Sample Master Contract for Grants

        - Attachment A-1: Agency-specific Terms and Conditions
        - Attachment A-2: Program-specific Terms and Conditions
        - Attachment A-3: Federally Funded Grants and Requirements Mandated by Federal Laws
    - Required Forms -
        - Performance-Based Budget Worksheet
            - Download this MS Excel file; this will need to be completed with the appropriate number of deliverable units, for attachment later in the application. (See Part B, Section VII. Completing the Performance-Based Budget Worksheet).
        - General Information Form
            - Download and complete all applicable sections, for attachment later in the application.
        - Agency Agreement Form
            - Download, sign and complete all applicable sections, for attachment later in the application.
        - Subcontractor and Supplier Identification Form
            - Download and complete all applicable sections, for attachment later in the application.
        - OTDA 4934 Equal Employment Opportunity Staffing Plan
            - Download and complete all applicable sections, for attachment later in the application.
        - OTDA 4937 M/WBE Utilization Plan
            - Download and complete all applicable sections, for attachment later in the application.
        - OTDA 4938 M/WBE Letter of Intent to Participate
            - Download, sign and complete all applicable sections, for attachment later in the application.
        - OTDA 4970 M/WBE and EEO Policy Statement
            - Download and complete all applicable sections, for attachment later in the application.
        - OTDA 4976 M/WBE Certification of Good Faith Efforts
            - Download, sign and complete all applicable sections, for attachment later in the application.

- EO 177 Certification
    - Download, sign and complete all applicable sections, for attachment later in the application.
- EO 16 Certification
    - Download, sign and complete all applicable sections, for attachment later in the application.
- Non-Collusive Bidding Certification
    - Download, sign and complete all applicable sections, for attachment later in the application.
- Offeror's Acknowledgment of Understanding of Post-Employment Provisions
    - Download, sign and complete all applicable sections, for attachment later in the application.
- Offeror's Assurance of No Conflict of Interest or Detrimental Effect
    - Download, sign and complete all applicable sections, for attachment later in the application.
- Sexual Harassment Prevention Certification
    - Download, sign and complete all applicable sections, for attachment later in the application.

- Click the “OK” button after finishing viewing/downloading the instructions, attachments and comments.

III. Questions

- Use the scrollbar to navigate to the Step 1: Answer General Event Questions section and enter the appropriate information for each question.
- Click the “Site/Project Address” link and enter the appropriate address details. When you have finished entering address details click the “OK” button. The Site/Project Address is where the grant will be used, or funds will be spent.
- Next you will review and respond to Event Questions and upload appropriate documents where prompted. Those that are flagged as Required (*) must be responded to in order to submit a bid response. The ability to add a Comment/Attachment will vary based on the question.
- Click the “Save for Later” button.
- In the resulting popup, click the “OK” button to save your progress.

IV. Budget

- Scroll to the bottom of the page. Under the Lines section, click the “Period Details” link under the Period column to access budget and work plan information.
- Click the “Budget Properties” link.
- Review the Budget Header Information. This section was completed by OTDA/BRS.
- Review the Budget Category Property section (including Narrative), noting which rows have “Available in Grant” checked. This section was completed by OTDA/BRS to help the grantee understand which Budget Category requires a response.
- Under Budget Category Property section, click “Plus Sign (+)” to add new row(s).
- Enter the applicable deliverable into the Budget Category field.
- Click the “Available in Grant” checkbox so the budget category details can be entered for the category.
- Scroll down to the Period Budget Summary section and click on the “Category Details” icon for the first budget category.
- Leave the Type/Description field blank.
- Enter the applicable value into the Grant Funds field.
- Enter the applicable value into the Narrative field.
- Click the “OK” button.
- Under the Period Budget Summary section, click on the “Category Details” icon for additional budget categories and repeat the previous steps as needed.
- After clicking the “OK” button, click the “Save” button.
- Click the “Back” button.
- Click the “Work Plan Properties” link.

V. Work Plan

All tasks an applicant proposes to provide must be described in the Work Plan. You will enter your Work Plan into the “Project Summary” text box on the “Work Plan Header” page in SFS. Applicants are required to provide all deliverables.

The first section of the Work Plan should focus on Organizational Capacity and be a High-level Overview of the project. It should also be completed from an annual perspective.

While drafting this section of your Work Plan, be sure to address the following:

- Describe in detail why SORP funding is needed.
- Describe the members of your community that belong to the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP. List their countries of origin, any special needs or

unique circumstances they may have and the barriers that may affect their ability to live healthy and independent lives.

- Describe how your agency has the capacity to engage and conduct outreach to the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP.

- Describe in detail how the services provided by your agency will meet the special needs and unique circumstances of the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, including how your agency proposes to address barriers to accessing services and information.

- Describe in detail how your agency will assist the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP to become self-sufficient and to live independently for as long as possible.

- Provide a high-level overview of the project, including the overall goals and desired outcomes, including information such as service location, hours of operation and overall number of persons to be served.

- Describe your organization's relevant experience and how you will utilize your current expertise and capacity to implement and support the services required by SORP.

- Describe in detail your agency staff's language capacity and cultural competency, and detail how services will be provided by agency staff in a culturally and linguistically appropriate manner.

- Describe how your staff will assist members of the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, for whom the agency has no language capacity.

- Describe how your staff will receive regular training and updates on the latest immigration issues, especially those that affect older refugees.

- Describe other programs or services that your agency operates and how they will be used to enhance the effectiveness of the proposed program. Include information on your agency's capacity for providing both aging related services as well as non-aging related services (e.g., transportation, public benefits navigation, etc.).

- Describe your agency's established relationships with the local Office for the Aging, local social services districts and other agencies or service providers in the community and detail what specific resources Participants will gain through these relationships.

- Describe how your service strategy can improve community health and wellness and align or coordinate with applicable New York State Prevention Agenda Priorities and the World Health Organization Eight Domains of Livability, consistent with Executive Order 190.

The second section of the Work Plan details the Service Strategy for program deliverables. While drafting this section of the Work Plan, be sure to address the following:

- Detail your service strategy for Cross Trainings, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), which types of agencies you propose to collaborate with and what gaps or needs you hope to address with the proposed collaboration.

- Detail your service strategy for Community Education Workshops, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), the topics you propose to discuss and the needs these workshops will address.

- Describe how barriers to attending Community Education Workshops will be removed so the maximum number of Participants may attend (e.g., describe transportation services that will be offered to Participants).

- Detail how your Community Education Workshop plans will involve the domestic senior community.

- Detail your service strategy for Socialization and Community Engagement, defining in sufficient detail the service delivery method (Who? What? When? Where? How?) and the activities you propose to provide Participants.

- Describe your plans for how Socialization and Community Engagement activities will provide Participants with educational stimulation and address social isolation.

- Describe your plans for Socialization and Community Engagement activities that will promote social inclusion providing opportunities for Participants to meet and socialize with other domestic seniors at events.

- Detail your service strategy for Assessments, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), including a description of any assessment tools you may use, and how such tools/methods will ensure that you will enroll only eligible Participants. Be sure to include details on your agency's process for:

    - Scheduling intake and determining eligibility of a prospective client.

    - Performing an assessment of needs**.**

    - Creating a Case Management Plan.

- Detail your service strategy for Housing Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Public Benefits Application Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Medical/Mental Health Care and Counseling, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Supportive Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Legal Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Food and Nutritional Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

- Describe your Naturalization Assistance strategies that incorporate all available pathways to become a US citizen (e.g., USCIS 55/15 and 65/20 exemptions).

- Describe your Naturalization Assistance strategies to provide comprehensive case management to help Participants obtain an N-648, Medical Certification for Disability Exceptions waiver.

- Detail your service strategy for Services to Older Refugees Five-Years Post Arrival Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).

- Detail your service strategy for Services to Older Refugees Five-Years Post Arrival Referrals, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).

- Describe the specific services that may be available within each Case Management Services category and any current or proposed relationships with other service providers who may work with your agency to coordinate these services. In addition, if your agency will have a subcontractor(s) perform certain services, indicate the specific services that the subcontractor(s) will provide.

- After completing the Work Plan in the Project Summary window, scroll down to view the Objectives >> Tasks >> Performance Measures screen.

VI. Objectives, Tasks and Performance Measures

The Objectives, Tasks and Performance Measures have been pre-filled by OTDA/BRS and should not be changed. If you accidentally delete one then add it back in the appropriate location by clicking on the relevant Objective row and then clicking on the green "+ Objective" button at the bottom left of the screen (follow these same steps if you accidentally deleted a Task or Performance Measure as well).

There are six available Objectives and they correspond to the six categories of deliverables referenced in Part A, Section VII. Service Strategy of the RFP. Each Objective has one or more Tasks associated with it. For example, the "Case Management Services" Objective has the following allowable Tasks: Housing Assistance; Public Benefits Application Assistance; Medical/Mental Health Care and Counseling; Supportive Services; Legal Services; Food and Nutritional Assistance; Naturalization Assistance; Other Identified Service Needs as approved by OTDA. If a task is allowable then a Contractor only needs to complete one of the allowable Tasks to complete an Objective. If an Objective has required tasks, all required tasks must be completed to complete an objective. For example, the "Assessment" Objective requires a Contractor to (1) schedule intake and determine eligibility of a prospective client, (2) perform an assessment of needs and (3) create a Case Management Plan to complete the Objective. If a subcontractor will provide a service be sure to indicate this.

- For each Task row, enter details regarding your intended service delivery into the Description field. For example, the only allowable Task for the "Cross Training" objective is "Hold a meeting with other relevant agencies or service providers." In the Description field of this Task, provide some examples of the different agencies or service providers you plan to meet with and the topics you plan to discuss. Be sure to define in sufficient detail the who, what, where, when and how for each task. Failure to define the method of service for a required task may result in the loss of points for the overall score of your proposal.

- For each Performance Measure row, select the Performance Measure Response Type drop-down list and select the Text/Comment option if it is not already selected.

- For each Performance Measure row, enter into the Description field details regarding your method of completing each. For example, the "Cross Training" Objective has as its only Performance Measure "Submit to OTDA/BRS a copy of the agenda, a summary of the meeting and a sign-in sheet on a quarterly basis." In the Description field, briefly explain this process.

- Tips: You can click the "arrow" to the right of the More Details tab to expand the view and see all fields. You can also increase the size of the Description text box by clicking in the bottom-right corner of the text box and dragging down.

- When you have added descriptions for all Tasks and Performance Measures click the "Save" button.

- Click the "Back" button.

- Click the "Return to Bid Response" link.

- Enter in the Your Unit Bid Price field the total Grant Funds Requested amount for the period (first grant year), in order to submit the bid response.

- When you are ready to submit your bid response, click the "Submit Bid" button.

- In the resulting popup, click the "Yes" button to confirm you would like to submit the bid.

Other helpful information for navigating SFS:

- SFS Coach on the Vendor Portal Homepage contains additional Tutorials, Videos and Job Aids. The SFS Handbook: Grantee Processing in SFS (Grantee User Manual) can also be downloaded here.

- The Resources for Grant Applicants page on the Grants Management website also contains useful information for grant applicants.

- If you have any questions regarding SFS you may contact the SFS Help Desk for assistance:

  Hours: Weekdays 8:00 a.m. - 5:00 p.m.

  Email: Helpdesk@sfs.ny.gov

  Phone: 1-518-457-7717

VII. Completing the Performance-Based Budget Worksheet

* This will be completed in addition to entering the budget information in Part B, Section IV. Budget

- Complete the previously downloaded Performance-Based Budget Worksheet MS Excel file by filling in the appropriate values for the highlighted cells. Be sure to only enter data into highlighted cells.

- This budget will be for the annual grant funds requested and the deliverables proposed for the first year of the grant contract. This first year will also be referred to as Budget Period 1 or BP1.

- Type in the Contractor SFS Payee Name.

- Enter into column C the proposed Payment Rates for each deliverable. Remember not to exceed the maximum payment rates listed in Part A, Section X. Program Information – Payment Rates of this RFP.

- Enter into column E the proposed Number of Units for all deliverables. A minimum of six Cross Trainings and four Community Education Workshops are required per Budget Period.

- Enter into cell C19 the Total Funds Requested for Budget Period 1. Only use whole dollar amounts on this worksheet.

- The "Total Funds Proposed” in cell C18 will calculate automatically based on the Payment Rates input into column C and the Number of Units that are input into column E. This number should be as close as possible to the “Total Funds Requested” number in cell C19 without exceeding it. Make sure that the “Total Funds Requested” amount is the same as the total Grant Funds Requested amount that you entered into the Your Unit Bid Price field in SFS.

- Save the file and upload to SFS in the Event Questions section along with the other required uploads.

Part C – Forms to Upload

I. Required Forms

Upload all required forms in the places designated throughout the application:

- **General Information Form**

  Complete all applicable sections and upload with the application.

- **Performance-Based Budget Worksheet**

  Complete all applicable sections and upload with the application. See Part B, Section VII. - Completing the Performance-Based Budget Worksheet for assistance in completing this worksheet.

- **Agency Agreement Form**

  Sign, complete and upload with the application.

- **Subcontractor and Supplier Identification Form**

  Complete all applicable sections and upload with the application.

- **OTDA 4934 Equal Employment Opportunity Staffing Plan**

  Complete all applicable sections and upload with the application.

- **OTDA 4937 M/WBE Utilization Plan**

  Complete all applicable sections and upload with the application.

- **OTDA 4938 M/WBE Letter of Intent to Participate**

  Sign, complete all applicable sections and upload with the application.

- **OTDA 4970 M/WBE and EEO Policy Statement**

  Complete all applicable sections and upload with the application.

- **OTDA 4976 M/WBE Certification of Good Faith Efforts**

  Sign, complete and upload with the application.

- **EO 177 Certification**

  Sign, complete and upload with the application.

- **EO 16 Certification**

  Sign, complete and upload with the application.

- **Non-Collusive Bidding Certification**

Sign, complete and upload with the application.

- **Offeror's Acknowledgment of Understanding of Post-Employment Provisions**

  Sign, complete and upload with the application.

- **Offeror's Assurance of No Conflict of Interest or Detrimental Effect**

  Sign, complete and upload with the application.

- **Sexual Harassment Prevention Certification**

  Sign, complete and upload with the application.

Applicants are required to complete the **New York State Vendor Responsibility Questionnaire Not-For-Profit Business Entity**, but it is not a required upload in SFS. Instructions on how to complete and file the Questionnaire can be found on the VendRep website www.osc.state.ny.us/vendrep.

The **Confidentiality/Non-Disclosure Agreement** is not a required upload in SFS. Upon award and approval of a resulting contract, it will be required to be signed by each of the Contractor's staff who have access to OTDA information. The Contractor would keep the signed forms on file and would need to produce them upon request.

Part D – Printed Version of Program Specific Questions

I. Program Specific Questions

1. Describe in detail why SORP funding is needed.

2. Describe the members of your community that belong to the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP. List their countries of origin, any special needs or unique circumstances they may have and the barriers that may affect their ability to live healthy and independent lives.

3. Describe how your agency has the capacity to engage and conduct outreach to the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP.

4. Describe in detail how the services provided by your agency will meet the special needs and unique circumstances of the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, including how your agency proposes to address barriers to accessing services and information.

5. Describe in detail how your agency will assist the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP to become self-sufficient and to live independently for as long as possible.

6. Provide a high-level overview of the project, including the overall goals and desired outcomes, including information such as service location, hours of operation and overall number of persons to be served.

7. Describe your organization's relevant experience and how you will utilize your current expertise and capacity to implement and support the services required by SORP.

8. Describe in detail your agency staff's language capacity and cultural competency, and detail how services will be provided by agency staff in a culturally and linguistically appropriate manner.

9. Describe how your staff will assist members of the eligible target population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, for whom the agency has no language capacity.

10. Describe how your staff will receive regular training and updates on the latest immigration issues, especially those that affect older refugees.

11. Describe other programs or services that your agency operates and how they will be used to enhance the effectiveness of the proposed program. Include information on your agency's capacity for providing both aging related services as well as non-aging related services (e.g., transportation, public benefits navigation, etc.).

12. Describe your agency's established relationships with the local Office for the Aging, local social services districts and other agencies or service providers in the community and detail what specific resources Participants will gain through these relationships.

13. Describe how your service strategy can improve community health and wellness and align or coordinate with applicable New York State Prevention Agenda Priorities and the World Health Organization Eight Domains of Livability, consistent with Executive Order 190.

14. Detail your service strategy for Cross Trainings, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), which types of agencies you propose to collaborate with and what gaps or needs you hope to address with the proposed collaboration.

15. Detail your service strategy for Community Education Workshops, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), the topics you propose to discuss and the needs these workshops will address.
16. Describe how barriers to attending Community Education Workshops will be removed so the maximum number of Participants may attend (e.g., describe transportation services that will be offered to Participants).
17. Detail how your Community Education Workshop plans will involve the domestic senior community.
18. Detail your service strategy for Socialization and Community Engagement, defining in sufficient detail the service delivery method (Who? What? When? Where? How?) and the activities you propose to provide Participants.
19. Describe your plans for how Socialization and Community Engagement activities will provide Participants with educational stimulation and address social isolation.
20. Describe your plans for Socialization and Community Engagement activities that will promote social inclusion providing opportunities for Participants to meet and socialize with other domestic seniors at events.
21. Detail your service strategy for Assessments, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), including a description of any assessment tools you may use, and how such tools/methods will ensure that you will enroll only eligible Participants. Be sure to include details on your agency's process for:
    - Scheduling intake and determining eligibility of a prospective client.
    - Performing an assessment of needs.
    - Creating a Case Management Plan.
22. Detail your service strategy for Housing Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
23. Detail your service strategy for Public Benefits Application Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
24. Detail your service strategy for Medical/Mental Health Care and Counseling, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
25. Detail your service strategy for Supportive Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
26. Detail your service strategy for Legal Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
27. Detail your service strategy for Food and Nutritional Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
28. Detail your service strategy for Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.

29. Describe your Naturalization Assistance strategies that incorporate all available pathways to become a US citizen (e.g., USCIS 55/15 and 65/20 exemptions).
30. Describe your Naturalization Assistance strategies to provide comprehensive case management to help eligible SORP clients obtain an N-648, Medical Certification for Disability Exceptions waiver.
31. Detail your service strategy for Services to Older Refugees Five-Years Post Arrival Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
32. Detail your service strategy for Services to Older Refugees Five-Years Post Arrival Referrals, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
33. Describe the specific services that may be available within each Case Management Services category and any current or proposed relationships with other service providers who may work with your agency to coordinate these services. In addition, if your agency will have a subcontractor(s) perform certain services, indicate the specific services that the subcontractor(s) will provide.