

Please stand by, the webinar will begin shortly.

**Department of Family and Support Services
Community Aging in Place Advancing Better Living
for Elders (CAPABLE) RFP #9271**

Release Date: Feb 2, 2023

Due Date: March 16, 2023, 12pm, Noon



House Keeping

- Due to the volume of participants, everyone has been placed on mute.
- Please submit questions via the question box and we will respond to questions after going through the slides.
- Please use the question box to notify us of any technical issues.
- This webinar is being recorded.
- A copy of the recording will be posted on the DFSS YouTube channel with a link to the recording and a .pdf of these Power Point slides will be posted to the DFSS webpage at: <https://www.chicago.gov/city/en/depts/fss.html> under the ‘Alerts’ and/or ‘Funding Opportunities’ tabs. This will take up to five business days.

Agenda

- Welcome and Introductions
- Purpose
- Background
- Information about the scope/program description
- Selection Criteria
- Timeline
- Technical Assistance for Applicants and eProcurement
- Questions

CITY OF CHICAGO



**REQUEST FOR PROPOSALS (RFP) FOR
Community Aging in Place – Advancing Better Living for Elders
(CAPABLE)
RFQ# 9271**

**ISSUED BY:
CITY OF CHICAGO DEPARTMENT OF FAMILY AND SUPPORT SERVICES**

All proposals must be submitted via the eProcurement system.

<http://www.cityofchicago.org/eprocurement>

Questions concerning the RFP should be directed to:

Stacy Subida, LCSW
Supervisor of Family and Support Services
Department of Family and Support Services
1615 W. Chicago Ave, 3rd Floor West
Chicago, Illinois 60622
312-743-7272
Stacy.Subida@cityofchicago.org

LORI E. LIGHTFOOT
MAYOR

BRANDIE V. KNAZZE
COMMISSIONER



Purpose of the RFP

- *The Community Aging in Place Advancing Better Living for Elders (CAPABLE) RFP seeks proposals from qualified community-based health organizations including but not limited to hospitals, home health care providers, managed care organizations, federally qualified health centers, accountable care organizations, or non-profit organizations who have experience citywide managing and conducting health assessments, providing education, fall prevention, and coaching in community-based settings for older adults aged 60 and older.*



Background

- The Senior Services Division is one of seven program areas within DFSS. The Senior Services Division is also designated as the local Area Agency on Aging (AAA) for the City of Chicago. As the AAA, DFSS coordinates and funds services for older adults, prioritizing those in greatest economic and social need those who live alone, and those at risk for institutional placement. Working in collaboration with aging network partners, the Senior Services Division's efforts are guided by:
 - Supporting older persons to live independently in their own communities and homes for as long as possible;
 - Ensuring that those who reside in institutions are treated with dignity and care; and,
 - Guaranteeing that older persons have access to accurate information to participate in public policy.

- Together with our service providers, we provide vital information and assistance, congregate and home delivered meal services, senior centers, fitness classes, caregiver support services, in-home services, employment training and volunteer opportunities, elder rights programs, health promotion and access to benefits. We continually innovate and advocate for our residents so they may continue to thrive as they age in place. We value integrity and respect as well as promoting social engagement among the elderly as an antidote to dependence, social isolation, and withdrawal.

- For more information on the DFSS strategic framework, visit www.cityofchicago.org/fss.



Background

- CAPABLE is an evidence-based person-centered program where older adult clients work in collaboration with medical partners and home modification providers.
- CAPABLE is an interdisciplinary intervention and fall prevention program that results in successful outcomes by collaborating with older adults, Nurses and Occupational Therapists (OTs), and handypersons to customize environmental home modifications that optimize independence and safety for older adults to remain living in their homes.
- The program was developed and implemented by the Johns Hopkins University School of Nursing in 2011.



Background

- DFSS will procure a Delegate Agency to utilize nurses and occupational therapists to provide guidance for installing adaptive devices and home improvements for older adults to ensure accessibility.

- Nurses and OTs will:
 - Recommend home modifications to increase independence and decrease fall risk,
 - Provide health-related education,
 - Conduct ten visits (within a 5-month timespan),
 - Meet with the home modification providers to discuss and review the recommended accessibility and safety modifications and scope of work.

- DFSS will collaborate with Department of Housing (DOH) Small Accessible Repairs for Seniors (SARFS) program. Home modifications will continue to be paid through SARFS.

- Representatives from DFSS and DOH will review and signoff on all recommended modifications before projects begin.



Small Accessible Repairs for Seniors (SARFS)

- The SARFS program aims to:
 - Promote independent living by funding minor repairs for accessibility, safety and security, such as installing grab bars, lever faucets, door repairs, and other improvements as identified.
 - Supply security devices by providing fire extinguishers, smoke and carbon monoxide detectors, dead bolt locks and other devices for security purposes.
- DOH works with ten (10) nonprofit Chicago-based Delegate Agencies providing services, of which five (5) will work collaboratively with CAPABLE.
- SARFS Delegate Agencies have in-house construction staff or work with reputable subcontractors to complete minor repairs.



SARFS Eligibility

- Senior must be at least 60 years of age who earn no more than 80 percent of the area medium income (AMI).

- Resides in the City of Chicago.

- Qualified recipients may be owners or renters residing in a one- to four-unit building.
 - Renters must have permission from the landlord and the landlord needs to certify that he or she will not increase the rent as a direct result of SARFS improvements).
 - Homes must be a detached, single-family home, condominium, town home, duplex or a 2–4-unit multi-family home



Goals

The goals of CAPABLE Program are to:

- Increase home safety, functionality, senior mobility and capacity to age in community
- Increase independence and safety with self-care task performance
- Delay premature nursing home placement
- Reduce Emergency Room (ER) visits and hospitalizations
- Reduce fall risks
- Reduce social isolation and depression



Current State and Priorities for Improvement

- 77% of adults 50 years of age or older prefer to age-in-place in their own homes (AARP, 2021).
- Supports such as home modification and assistive technology are essential to help older adults safely remain in their homes as they age in place. 34% of older adults indicate that they may need a home modification such as installing ramps in order to remain at home (Binette, 2021).
- Evidence from CAPABLE interventions showed that 74.8% of clients demonstrated gains in Activities of Daily Living (ADL) functioning (Szanton, et al., 2016).



Current State and Priorities for Improvement

- 75% of participants evidenced improved health outcomes including increased functioning, lower hospitalization rates, decreased nursing home placement, lower disability, and a decrease in depressive symptoms.

- The program seeks to
 - Decrease social isolation and increase engagement
 - Provide education to participants about fall prevention strategies
 - Gain access to medical supports and resources
 - Recommend environmental modifications

- The program will enable older Chicagoans to remain at home and age-in-place safely for as long as possible.



Target Population

- Eligible participants include:
 - Older Adults 60 years of age or older
 - Client must meet at least one criteria of assistance with Activity of Daily Living (ADL)
 - City of Chicago Residents
 - Homeowners or Renters with landlord permission (Landlord must certify that he / she will not increase the rent as a direct result of the home improvements)
 - Must reside in a one-to-four-unit building

- The selected Respondent will provide CAPABLE services city-wide to ensure equitable access to all residents.

- A well-developed service-delivery plan should include programs offered in the north, south, west and central Chicago regions.

- SARFS is currently operating with a wait list, which will serve as the starting point for client referrals participating in the CAPABLE pilot.



Program Requirements

- The selected Respondent will be responsible for the program management including outreach, program implementation, retention, and data collection on the impact of programs on clients served.
- Overall, the selected Respondent should aim to serve a total of 50 clients for the full fiscal year city-wide.



Program Requirements – Staff Training

- A training will be conducted by The CAPABLE National Center or the selected Respondent, DFSS Senior Services staff, DOH staff, Delegate Agencies, and any relevant sub-contractors.
- The training is available online and is a combination of modules, home visit simulations, white board and client videos. The training is supported by additional virtual office hours, a listserv, and a review of work orders per OT.
- Occupational Therapists and RNs are eligible to receive up to 0.8 CEUs or 8 contact hours.
- The selected Respondent must establish ongoing comprehensive in-service training for staff involved in the project to recognize clients in need of other DFSS services or referrals for appropriate services.



Program Requirements – Staff Training

- The CAPABLE National Center will provide the following professional assistance and program support:
 - Availability by phone or email to respond to program questions.
 - 5-7 hours of Program Coordinator training (live or virtual)
 - Virtual learning collaborative for providers up to twice monthly or as needed
 - RN and OT office hours every other week and Program Coordinator office hours monthly
 - Review of communication materials and processes
 - Monitor for CAPABLE program implementation fidelity (provider annual survey)



Program Requirements – Outreach

- DOH will provide the names and addresses of recommended eligible older adults from the SARFS program.
- The selected Respondent will conduct ongoing outreach activities to ensure participation and retention in the program.
- Outreach efforts may include, but are not limited to community presentations, brochures, flyers, webinars, and existing DOH SARFS waiting lists or social media. Additionally, the Respondent must include the DFSS I & A and DOH's phone number and email address on outreach materials.
- Promotional materials are subject to approval by Public Information Officer - Senior Services and must list DFSS, DOH / SARFS and / or Funder as a source of funds supporting CAPABLE Program services.




Program Requirements – Intake and Eligibility

- All clients can be referred for CAPABLE services through the DOH SARFS Program. The DOH SARFS program will be responsible for collecting qualifier demographic information including client’s address, phone number, gender, date of birth, ethnicity, race, income status, client demographic information, including if senior lives alone. SARFS will provide DFSS Caregiver Portfolio Program Manager with a list of eligible program participants, who can be enrolled into CAPABLE after SARFS completes a screening tool to opt-in. The DFSS Caregiver Portfolio Program Manager will add the clients to the DFSS tracking systems (i.e., Salesforce, AgingIS).
- The selected Respondent may take direct referrals; however, the referrals should be forwarded to DOH SARFS.
- Upon review of the referral list, DFSS will forward the client information to the selected Respondent’s Program Coordinator.



Program Requirements – Assessment

- The selected Respondent is responsible for contacting the client within 3-5 business days from the receipt of referral to determine the level of services, complete the pre-screening process, and to schedule the first home visits with the Nurse and OT. Selected respondents conduct the CAPABLE pre-screening assessment process once the referral is received.
- OTs and Nurses will be required to complete the C-CAP RN and C-CAP OT assessment tools during their first visit(s) with the clients. Selected Respondents will also be required to address the following during their assessment process:
 - Identify the need and determine the reason for CAPABLE services.
 - Inform the client of public / private programs and services available.
 - Ensure that there is no abusive / negligent environment.
 - In general, assessments should be completed in-person. Virtual options (telephone and web-based tools such as Go-To-Meeting, Skype, Zoom) can be provided as an alternative in extenuating circumstances.
 - After the assessment process, the respondents may make client referrals to I & A as appropriate to DFSS for other Senior Services' programs like Home Delivered Meals, Respite, Chore and other DFSS services can be arranged for the client. Email service requests can be sent to I &A at aging@cityofchicago.org or the DFSS program manager.
 - Once the assessment has been completed, the selected respondent will enter client information into the organization's client tracking system.



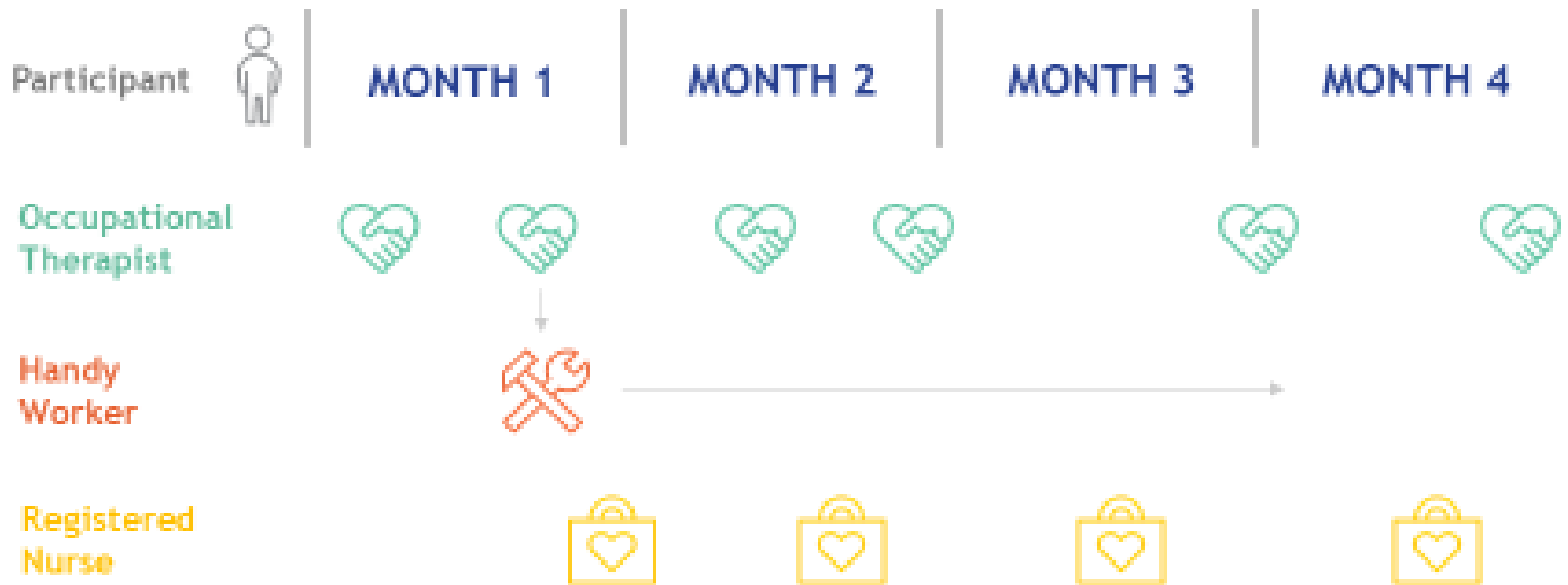
Program Requirements - Home Visits and Planning

- The OT will be required to make six (6) visits per participant; the Nurse will be required to make four (4) visits per participant. Participants work with the OT and Nurse to identify achievable goals.
- The participant learns new skills, exercises in relation to how to effectively and safely use the CAPABLE recommended supports, equipment, home modifications, practicing in between visits.
- Home visits will continue over a span of four (4) months by the OT and RN with home repairs and equipment, until completion of the repair.
- Once DOH and the SARFS receive the CAPABLE recommendations, the SARFS delegate agency will schedule a time to begin and complete the home improvements. All CAPABLE recommendations made will be subject to DOH and SARFS agreement and program requirements.

Program Requirements – Home Visits and Planning

CAPABLE Program

An in-home program targeting older adults with functional limitations to achieve functional goals



Program Requirements – Purchase of Additional Adaptive Equipment / Assistive Devices

- The selected Respondent will be responsible for purchasing, as needed, a limited supply of adaptive equipment / devices not covered under SARFS program, which complement home accessibility for the participant such as step stools, trapeze bars, armrest chairs, lift chairs, bed canes, bedside rails, reachers, sock aids up to \$800.
- In instances where funds required exceed this amount, it will require advanced written approval of the DFSS Program Manager and funding availability.



Program Requirements – Purchase of Additional Adaptive Equipment / Assistive Devices

- Allowable purchases include support items for the participant:
 - i. Medical supplies and equipment not covered by Medicare, Medicaid or other insurance. Requests for medical supplies should receive physician verification when possible.
 - ii. Adaptive clothing, furniture, glasses, aids, etc.
 - iii. Adaptive safety devices such as emergency home response and assistive technology
- The following purchases are not allowable:
 - i. Cash assistance or gift cards
 - ii. Travel expenses
 - iii. Mortgage or rental assistance
 - iv. Automobile payments
 - v. Sporting or Recreational assistance
 - vi. Co-payments or deductibles towards items covered under other programs or public benefits
 - vii. Legal fees



Program Requirements – Units of Service

- Unit/Costs/Rates: The unit of service is one (1) session per participant with a cap of ten (10) sessions in a 5-month period. In instances, where clients may need to exceed the 10 sessions, it will require approval of the DFSS Program Manager and funding availability. Travel, paperwork, planning, administrative duties should be included in the unit rate reimbursement.
- The first visit is usually 2 hours; subsequent visits are 1 to 1.5 hours. Included are documentation, coordination and travel time.
- RN and OT office hours occur every other week; these are optional but strongly encouraged.



Program Requirements – Staff Qualifications

- The selected Respondent is required to assign and maintain for the duration of the Services, a staff of qualified and experienced personnel to effectively coordinate and perform the expected services.
- The selected Respondent will retain and make available to the City, State and Federal agencies governing funds provided under this Agreement, proof of certification or expertise including, but not limited to, licenses, resumes and job descriptions (if applicable). The resumes, certifications and any special licenses for staff involved in the CAPABLE pilot project must be submitted with the application.
- The selected Respondent will employ/assign at least one Registered Nurse (RN) and one Occupational Therapist (OT) (both with previous geriatric experience and without discipline preferred) to provide CAPABLE services. The Handyperson will be contracted through Department of Housing (DOH) SARFS program Delegate Agencies.



Program Requirements – Background Check Requirements

- The selected Respondent will comply with all applicable Federal, State, and local laws, ordinances, policies, procedures, regulations, rules, requirements, and executive orders relating to background checks, fingerprinting, and screening procedures to ensure children and seniors safety. In connection with the Services, the selected Respondent will not permit any adult, whether a member of the Respondent’s staff or otherwise, to be involved with the Services or to have direct contact with seniors if any applicable legal requirements would prohibit such adult from having such involvement or contact. Background checks are an allowable cost if it is included in the agency’s budget that is submitted to DFSS and an allowable expense by the grantor.

- Adults 18 and older, whether they are staff, volunteers, consultants, subcontractors, operators, individuals in family homes, or individuals used to replace or supplement staff who may have direct or indirect contact with seniors or access to their confidential information will need to complete a background check.

- Delegate agencies are required to administer the following types of background checks for the individuals listed above:
 - a fingerprint criminal background check that searches both FBI and state databases.
 - a search of the Illinois Sex Offender Registry.
 - a search of the Adult Protective Services (APS) Registry, if delivering services in a senior’s home.

- In addition to having records of completed checks available during DFSS monitoring visits, delegate agencies also need to have written policies on background checks that should include:
 - 1) An appeal process for individuals who dispute the findings of their background check.
 - 2) A policy to address comingling of services if your service location includes programming serves for seniors or children.
 - 3) A policy on conditional employment while an employee awaits results of their background check; and
 - 4) A list of offenses that will disqualify a candidate from being hired or volunteering.

- Failure to prove evidence of a background check completion may result in default and possible termination of your agreement with DFSS. Delegate agencies also have an affirmative duty to timely report to DFSS any incident.



Program Requirements – Client Contributions

- The selected Respondent may not charge for any services provided under the ARP grant agreement.
- However, pursuant to the OAA, all clients must be provided the opportunity to contribute or donate to the cost of their services. Contributions are strictly voluntary, and no client will be refused service for not contributing. All donations must be used to expand services.
- All project income must be expended within the fiscal year in which it was earned.



Performance Goals and Outcomes

➤ To track progress toward achieving the outcome goals of this program and assess success, DFSS will monitor a set of performance indicators that may include, but are not limited to:

- 80% of clients surveyed indicate overall satisfaction with the services and supports to help age in the community
- 80% of clients indicate the home modification has resulted in increased independence and safety with self-care task performance
- 80% of clients report no falls or reduction in instances of loss of balance
- 80% of clients report reduced or no pain
- 80% of clients report reduce social isolation and depression



Performance Goals and Outcomes

- Program evaluation questions should include basic questions to collect the above information at the end of each program activity in order to track progress and / or program impact. To monitor and recognize intermediate progress toward the above performance indicators, DFSS also intends to track output metrics that may include, but are not limited to, and will be modified to match the selected RFP application:
 - Conduct 500 home visits (10 visits to 50 clients annually).
 - Conduct home modifications in at least 50 households
 - 50 clients served

- The National CAPABLE office will complete an annual evaluation with the delegate agency. Performance measures will include Activities of Daily Living, Instrumental Activities of Daily Living, Depression Scale, Falls-Efficacy, Pain Perception, self-report Health status, self-report Home Environment, self-efficacy or engagement. After the program is completed, other measures will include client satisfaction, and goals met.

- In addition to the performance indicators and output metrics listed above, DFSS encourages Respondents to propose additional indicators and metrics, including those that are indicative of participants' progress.



Contract Management and Data Reporting Requirements

➤ Client Files

- The selected Respondent must maintain a confidential file on each client. Client files must be kept in a secure, locked space. The selected Respondent can select to keep case notes and files electronically. The selected Respondent must implement policies and procedures to ensure privacy and confidentiality of client record for both paper file and electronic databases.

➤ Client Complaints and Grievances

- The selected Respondent must supply all older adults and caregivers with a mechanism for filing complaints or grievances with regards to the selected Respondent's service delivery. Clients must also be given a mechanism for comments and suggestions on service delivery improvements. DFSS reserves the right to create such a mechanism, to be distributed by the selected Respondent selected Respondent or administered by DFSS to all clients. The selected Respondent must submit complaints to DFSS in a timely manner (i.e., email, phone call).



Contract Management and Data Reporting Requirements

➤ Program Evaluation and Satisfaction Surveys

- The selected Respondent must have procedures for evaluating and reporting the client's satisfaction with the delivery of service as well as their satisfaction of the outcomes of the service.

➤ Reports, Invoices and Meetings

- The selected Respondent must use a DFSS approved computerized client tracking system to provide required data and reports to Senior Services monthly on the 5th of the month for the clients served in the preceding month. The selected Respondent will keep track of units of service provided, unduplicated counts of persons served and other demographic data necessary for planning and evaluation of the program. Both program and financial reports are required of all funded providers.
- Senior Services reviews reports submitted by providers to determine that resources have been expended according to approved budgets, that the request for funds is correct and is consistent with the approved award, to monitor and assess program activity and identify any significant operational problems that should be corrected and to identify the need for technical assistance to address inadequate fiscal knowledge, or excessive administrative costs.
- Quarterly meetings, or as otherwise scheduled, will be held with the agency to discuss program operations and progress. Attendance is mandatory and is not subject to reimbursement.



Guidance to Applicants - Required Documents

- The applicant will be required to submit the following attachments to complete the application:
 - Liability insurance
 - Board Member identification
 - SAM certificate
 - Certificate of Good standing
 - Bylaws and articles of incorporation
 - Financial Statement
 - IRS determination letter
 - City of Chicago compliance acknowledgement
 - Conflict of Interest
 - Resumes and / or job descriptions
 - Staffing Chart



Selection Criteria – Community Involvement

The Respondent:

- Demonstrates a clear understanding of the target population, including their strengths and assets and needs and challenges
- Demonstrates client and community engagement activities that inform service delivery
- Has expertise working with the target population and has relevant capabilities and/or infrastructure needed to serve this group
- Demonstrates a commitment to diversity, equity, inclusion, and access
- Leadership reflects and engages the diverse people of the communities it serves



Selection Criteria - Organizational Capacity

The Respondent has:

- Qualified staff responsible for program oversight and management
- Adequate systems and processes to support monitoring program expenditures and fiscal controls
- Adequate Human Resources capacity to hire and manage staff
- Capacity to fulfill services citywide



Selection Criteria – Strength of Proposed Program

The Respondent:

- Clearly defines services to be provided (directly or through partnerships/linkage agreements with other agencies) that are appropriate to addressing needs of and achieving desired outcomes for the target population
- Proposed program is supported by a strong national or local evidence base and/or aligns with best practices for the relevant field
- Has an effective approach to identifying and retaining program participants (including rules/regulations that reduce barriers to participation)
- Has partnerships or coordinates with other agencies to expand or improve services in a client-centered, comprehensive way
- Has an assessment tool to determine the client's level of need and described a modality to determine goals and make recommendations
- Describes a complete purchasing process from identification to payment and delivery.



Selection Criteria – Performance Management and Outcomes

The Respondent:

- Demonstrates evidence of strong past performance against desired outcome goals and performance metrics and/or other notable accomplishments in providing services to the target population
- Has experience using data to inform/improve its services or practices
- Has the relevant systems and processes needed to collect and store key participant and performance data
- Describes their current performance improvement strategies



Selection Criteria – Reasonable costs, budget justification, and leverage of funds

The Respondent:

- Has the fiscal capacity to implement the proposed program
- Leverages other funds and in-kind contributions to support total program and administrative cost (e.g., state, federal, foundation, corporate, individual donations)
- Demonstrates reasonable implementation costs and funding requests relative to its financial and human resources. The proposed budget supports the proposed scope of work or work plan
- Explains key budgeting decisions and how these have impacted program costs



Selection and Transition Timeline

- **Pre-proposal webinar – February 15, 2023**
- **Applications due – March 16, 2023**
- **Program period begins – April 03, 2023**

Anticipated term of contract and funding source

- The term of contract(s) executed under this RFP will be from April 15, 2023 - September 30, 2024. Based on need, availability of funds and contractor performance, DFSS may extend this term for up to one year.
- DFSS funding will support the nurses and occupational therapists that will work with the older adults and the DOH delegate agencies on repairs. The funding is through the Illinois Department on Aging (IDoA). DFSS anticipates **one** delegate agency will be awarded up to \$191,335 in year one and \$307,665 in year two depending on the size of their proposed program, a total two-year award of \$499,000. This contract will operate on a reimbursement basis only. No advances will be given.
- The selected Respondent should aim to reach as many older adults as possible and as the funds allow. Unduplicated numbers include participants receiving a CAPABLE service for the first time.
- This initiative is administered by the DFSS through American Rescue Plan funds. Consequently, all guidelines and requirements of the DFSS and the Older Americans Act must be met.



Budgets or Cost Proposals – Advice

- Please submit a budget for ONE year (12 mos.) of services.
- Cost category definitions are attached as Budget instructions in every RFP (except RFPs that have cost proposals).
- Be thoughtful and inclusive when developing your budget. Apply for your program's actual costs.
- Use the reasonable costs question on the application to discuss how you determined the costs reflected in the budget.

Common mistakes we see on budgets are:

- Fringes – check your calculations.
- Supplies – these are frequently under or over budgeted for.
- Put your budget in the appropriate column.
- Show your match!



Deadline



Applications are due
on **March 16, 2023**
at **12:00, Noon**



Application Tips

Start Early!!

- If you have never done business with the City of Chicago, register into iSupplier/eProcurement ASAP.
- Review RFP narratives and application questions closely. Remember they align with the scope and selection criteria. Use the information in the RFP for guidance in formulating your answers.
- There is a 4,000 character limit which includes punctuation and spaces. Each response is allotted 4,000 characters.
- Do not use the back button on your browser.

Save Often!!



Tips for Working in eProcurement

- To submit multiple applications for a single RFP applicants will need to set up a unique user account in iSupplier but all the user accounts can use the same email address. The eProcurement system is not capable of submitting more than one distinct proposal per associated e-mail address. Therefore, **you must use a separate email address for each submittal proposal.**
- You can “submit” your application and later amend it up until the due date of March 16, 2023 at 12:00 noon.
- Avoid the rush and possible mishaps by submitting early. Plan on submission taking 30-60 minutes.
- Late applications will not be accepted.
- Make use of the eProcurement hotline for help at 312-744-4357 (HELP).
- **Please note that the hotline operates during business hours only, Monday-Friday 9-5.**

Save often, submit early!



Technical Assistance!

- On the DFSS web page is a link to the RFP of interest and training documents. See “Alerts” Section on our website.
- For Questions on Registration and eProcurement Technical Assistance for Delegate Agencies –
CustomerSupport@cityofchicago.org
or
call 312-744-HELP (4357)
- Training Materials (Documents and Videos) –
<https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html>

How to accept an amendment

How to accept an amendment – Step 1

- If the RFP you are interested in has been amended. In order to start an application, you will need to acknowledge and accept the amendment first. (Please note that the RFP shown in this and subsequent slides is an example). To accept the amendment, click on “View Amendment History”.
- If the RFP has not been amended (yet), select “Create Quote” from the drop-down menu in the “Actions” box and click on “Go”. This will take you to the application page, where you can get started.

Negotiations > Active Solicitations >

Warning
RFQ 6459 has been amended. To be considered for award you must acknowledge each amendment and submit (or resubmit) all your responses to ensure that they comply with the changes.
[View Amendment History](#)

RFQ: 6459,3

Actions:

Title: **Community Housing Development Organization (CHDO) Certification**
Status: **Active**
Time Left: **555 days 23 hours**

Supplier Response Start Date: **17-Aug-2020 11:01:54**
Bid Opening Date/Supplier Response Due Date: **31-Dec-2023 12:00:00**

Header | Lines | Controls | Contract Terms

Buyer: **MCCLARN, GRAYLEN**
Quote Style: **Blind**
Outcome Description: **Community Housing Development Organization (CHDO) Certification**

Event: **Delegate Agency**
Amendment Description: **Updating Issuing Officers information**

Terms

Bill-To Address: [021-2819 HOME INVEST](#)
Ship-To Address: [021-2819 HOME INVEST](#)
FOB

Payment Terms
Carrier
Freight Terms

Currency

How to accept an amendment – Step 2

- To begin the acceptance and acknowledgment process, to open the RFP in view only: (1) click on the Document number. (2) To review the amended changes to the RFP, click on the infinity or eyeglass icon. (3) To acknowledge receipt and understanding of these changes and proceed, click on the “Acknowledge Amendments” button.
- By acknowledging the amendment, you are indicating that you are aware of the changes made to the RFP in the amendment.

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Home Logout Preferences Help

Negotiations > Active Solicitations > RFQ: 6459,1 >

Amendment History (RFQ 6459)

To be considered for award you must acknowledge each amendment and submit (or resubmit) all your responses to ensure that they comply with the changes. [Acknowledge Amendments](#)

Show All Details | Hide All Details

Details	Document Number	Title	Status	Acknowledgement Date	Review Changes
Hide	6459.1	Community Housing Development Organization (CHDO) Certification	Active		
Amendment Description This addendum is to remind applicants that the CHDO certification and recertification process is not a request for funding.					
Published Date 28-Aug-2018 13:25:01			Close Date 14-Aug-2020 14:01:32		
Show	6459	Community Housing Development Organization (CHDO) Certification	Amended		

[Return to RFQ: 6459.1](#)

[Acknowledge Amendments](#)

Negotiations Home Logout Preferences Help

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How to accept an amendment – Step 3

- When you get to this screen, click on the “I accept...” check box and then click on “Acknowledge”

Acknowledge Amendment (RFQ 6459,3)

To be considered for award you must acknowledge each amendment and submit (or resubmit) your response to ensure your response complies with the changes.

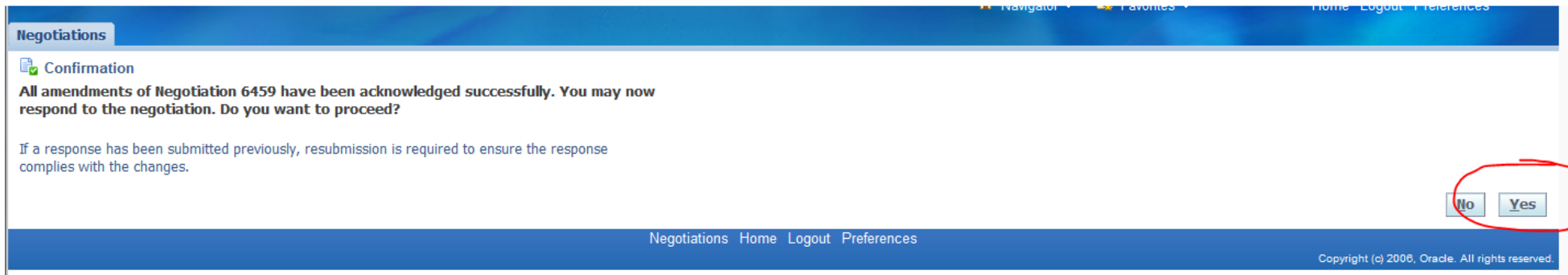
Step 3 of 3

I accept the terms and conditions of the RFQ and also acknowledge the changes made to the RFQ amendment document 6459,3.

Header		
Label	RFQ 6459,2	RFQ 6459,3
Amendment Description	This amendment was created to extend the closing date.	Updating Issuing Officers information
Terms		
Label	RFQ 6459,2	RFQ 6459,3
Bill-To Address	054-2819 HOME INVESTMENT PARTNERSHIP	021-2819 HOME INVEST
Ship-To Address	054-2819 HOME INVESTMENT PARTNERSHIP	021-2819 HOME INVEST
Requirements		

How to accept an amendment – Step 4

- Click on “Yes” to indicate that you confirm your acknowledgement of the amendment.



The screenshot shows a web application interface with a blue header and footer. The main content area is white and contains a confirmation message. The message reads: "Confirmation All amendments of Negotiation 6459 have been acknowledged successfully. You may now respond to the negotiation. Do you want to proceed?" Below this message, there is a note: "If a response has been submitted previously, resubmission is required to ensure the response complies with the changes." At the bottom right of the main content area, there are two buttons: "No" and "Yes". The "Yes" button is circled in red. The footer contains the text "Negotiations Home Logout Preferences" and "Copyright (c) 2006, Oracle. All rights reserved."

How to accept an amendment – Step 5

- Finally, (1) click on the checkbox that you accept the terms and conditions and then (2) click on “Accept” to accept them.
- This is the final step in acknowledging and accepting the amendment.

Negotiations

Terms and Conditions

The following terms and conditions must be accepted before a quote is placed in this RFQ.

City makes no representations or warranties that the electronic procurement system utilized by the City on any procurement will accurately and timely transmit any bidder's bid or proposal or any other information to the City. All bidders use this system at their own risk. The City disclaims all liability that may result or arise from the use by any bidder of the eprocurement system, including claims for lost profits and consequential damages.

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

I have read and accepted the terms and conditions

1

2

How to submit an application



How to submit an application – Step 1

- When you are ready to submit, start by saving your draft one last time. Then click Continue.

Negotiations > RFQ: 6459,3 >
Create Quote: 427990 (RFQ 6459,3)

Cancel View RFQ Quote By Spreadsheet **Save Draft** **Continue**

Title Community Housing Development Organization (CHDO) Certification Time Left **555 days 19 hours**
Bid Opening Date/Supplier Response Due Date **31-Dec-2023 12:00:00**

Header Lines

Supplier **PHALANX FAMILY SERVICES**
RFQ Currency **USD**
Quote Currency **USD**
Price Precision **0 decimals maximum**

Quote Valid Until
(example: 23-Jun-2022)
Reference Number
Note to Buyer

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								



How to submit an application – Step 2

- If you are missing information, you will be given an error message on the top of the page.

The screenshot shows a web application interface for submitting a quote. At the top, a light blue banner contains an error message: "Error: The RFQ control requires you to quote on all lines". Below this, the text "Create Quote: 427990 (RFQ 6459,3)" is visible. The main content area has a title "Community Housing Development Organization (CHDO) Certification". On the right, there are buttons for "Cancel", "View RFQ", "Quote By Spreadsheet", "Save Draft", and "Continue". Below these buttons, the "Time Left" is "555 days 19 hours" and the "Bid Opening Date/Supplier Response Due Date" is "31-Dec-2023 12:00:00". The "Header" section includes "Supplier: PHALANX FAMILY SERVICES", "RFQ Currency: USD", "Quote Currency: USD", and "Price Precision: 0 decimals maximum". The "Quote Valid Until" field is empty with a calendar icon and an example "(example: 23-Jun-2022)". The "Reference Number" and "Note to Buyer" fields are also empty. At the bottom, there is an "Attachments" section with an "Add Attachment" button.

How to submit an application – Step 3

- Usually, the error messages direct to something left undone in the application.
- In the last example, the error message indicated that the lines (found under the lines tab) had not been filled out.

The screenshot displays a software interface with an error message at the top. The error message, titled "Error", states: "The RFQ control requires you to quote on all lines". Below the error message is a link: "Create Quote: 427990 (RFQ 6459,3)".

Below the error message is a table with columns "Title" and "Com". The table is currently empty.

Below the table is a tabbed interface with two tabs: "Header" and "Lines". The "Lines" tab is selected and circled in red.

Below the tabs is a table with the following data:

Supplier	PHA
RFQ Currency	USD
Quote Currency	USD
Price Precision	0 de

Below the table is a section titled "Attachments" with a button labeled "Add Attachment".

How to submit an application – Step 4

- In this example, the error is about an unanswered question in the application (or Requirements section). The Quote Value refers to your (in this case, missing) answer.

The screenshot displays a procurement system interface for RFQ 6459.3. At the top, a navigation bar shows 'Negotiations > RFQ: 6459.3 >'. Below this, a red-bordered error message box contains the text: 'Error: A quote value is required for requirement First Name.' Below the error message is a button labeled 'Create Quote: 427990 (RFQ 6459,3)'. The main header area includes the title 'Community Housing Development Organization (CHDO) Certification', 'Time Left: 555 days 19 hours', and 'Bid Opening Date/Supplier Response Due Date: 31-Dec-2023 12:00:00'. There are buttons for 'Cancel', 'View RFQ', 'Quote By Spreadsheet', 'Save Draft', and 'Continue'. The 'Header' section shows 'Supplier: PHALANX FAMILY SERVICES', 'RFQ Currency: USD', 'Quote Currency: USD', and 'Price Precision: 0 decimals maximum'. It also includes fields for 'Quote Valid Until', 'Reference Number', and 'Note to Buyer'. Below the header is an 'Attachments' section with an 'Add Attachment...' button and a table with columns: Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, and Delete. The table shows 'No results found.'. The 'Requirements' section is highlighted with a red circle. It contains a table with columns: Focus Title, Target Value, and Quote Value. The 'Quote Value' column is also circled in red. The table has two rows: 'Requirements' and 'Contact Information'. The 'First Name' requirement is circled in red, and its corresponding 'Quote Value' cell is empty.

Focus Title	Target Value	Quote Value
Requirements		
Contact Information		

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								



How to submit an application – Step 5

- Once your application is free from errors, you are ready to proceed and submit! At this point, clicking “Continue” should put your application into the “Review and Submit” phase.

Negotiations

Negotiations > RFQ: 6459,3 >
Create Quote 427990: Review and Submit (RFQ 6459,3)

Header

Title	Community Housing Development Organization (CHDO)	Time Left	555 days 19 hours
Certification		Close Date	31-Dec-2023 12:00:00
Supplier	PHALANX FAMILY SERVICES	Quote Valid Until	
RFQ Currency	USD	Reference Number	
Quote Currency	USD	Note to Buyer	
Price Precision	0 decimals maximum		

Attachments



How to submit an application – Step 6

- This is your last chance to review all your data and confirm that it is accurate. Check your attachments and scroll to the bottom of the screen to see all your responses.

Header

Title Chicago Early Learning Community-Based Programs RFP #2
 Supplier Claridigm Inc
 RFQ Currency USD
 Quote Currency USD
 Price Precision Any

Time Left 20 days 3 hours
 Close Date 15-Jul-2019 12:00:00
 Quote Valid Until
 Reference Number
 Note to Buyer

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Requirements

[Show All Details](#) | [Hide All Details](#)

Details Section

Hide Contact Information

Requirement	Target Value	Quote Value
First Name		John
Last Name		Chicago
Telephone		864-855-9999
E-mail Address		TheBestAgency@childcare.com
Contact Type		Email Applicant

Hide Organization Information

Requirement	Target Value	Quote Value
Legal Organization Name		Super Leaders Academy Nation
Address		18555 E. 32nd St
City		Chicago
State		IL
Zip		60699
Telephone Number		845-251-XXXX
Federal Employer Identification Number		84-992289
DUNS Number		92-8992-5110
Head of Agency Name		Jane Doe
Head of Agency Title		Executive Director
Head of Agency Contact Telephone		845-251-XXXX
Head of Agency E-mail Contact		JaneDoe@superLeadersAcademy.com
Chief Finance Officer Name		Terry Doe Jr.
Chief Finance Officer Title		Finance Officer
Chief Finance Officer Telephone		845-251-XXXX
Chief Finance Officer E-mail		terrdoe@superLeadersAcademy.com
Website Address		NA
Year Org. Established		2008
Did you attach the following in your Admin. section? *Liability Insurance *Board Member Identification *IRS Determination Letter *SAM Certificate *Certificate of Good Standing *Bylaws and Articles of Incorporation *Financial Statement		Yes

Show Geographic Area(s) Served



How to submit an application – Step 7

- At the bottom of the screen you will be asked to provide an electronic signature. Be sure to fill in the signature before checking the box!

<input type="radio"/>	10000 - Admin - Tr...			20,000.00	USD		1	20,000.00		
<input type="radio"/>	110100 - Admin - Op...			7,400.00	USD		1	7,400.00		
<input type="radio"/>	120140 - Admin - Pr...			25,000.00	USD		1	25,000.00		
<input type="radio"/>	130200 - Admin - Tr...			1,500.00	USD		1	1,500.00		
<input type="radio"/>	140300 - Admin - Ma...			6,000.00	USD		1	6,000.00		
<input type="radio"/>	150400 - Admin - Eq...			1.00	USD		1	1.00		
<input type="radio"/>	160801 - Admin - In...			1.00	USD		1	1.00		
<input type="radio"/>	170999 - Admin - Ot...			2,500.00	USD		1	2,500.00		
<input type="radio"/>	181240 - Program - ...			19,500.00	USD		1	19,500.00		

Line 1: 0005 - Program - Personnel

Notes

Note to Buyer

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update
0 results found.							

Electronic Signature

By submitting a bid/proposal/application and inputting his/her name and title, the person signing below certifies that he/she is authorized to submit this bid/proposal/application on behalf of the submitting party and warrants that all certifications and statements contained in the bid/proposal/application are true, accurate and complete as of the date furnished to the City. The person signing below understands that this submission will be binding on the submitting party.

* Name:
* Title:

* Indicates required fields. Before submitting the response please enter Name and Title and accept the disclaimer by checking the box above.

[Cancel](#) [Back](#) [Validate](#) [Save Draft](#) [Printable View](#)



How to submit an application – Step 8

➤ Then click **“Submit”**.

Op...			7,400.00	USD	1	7,400.00
Pr...			25,000.00	USD	1	25,000.00
Tr...			1,500.00	USD	1	1,500.00
Ma...			6,000.00	USD	1	6,000.00
Eq...			1.00	USD	1	1.00
In...			1.00	USD	1	1.00
Ot...			2,500.00	USD	1	2,500.00
- ...			19,500.00	USD	1	19,500.00

n - Personnel

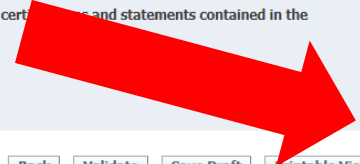
Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete

bid/proposal/application and inputting his/her name and title, the person signing below certifies that he/she is authorized to submit this bid/proposal/application on behalf of the submitting party and warrants that all cert... and statements contained in the application are true, accurate and complete as of the date furnished to the City. The person signing below understands that this submission will be binding on the submitting party.

: Test

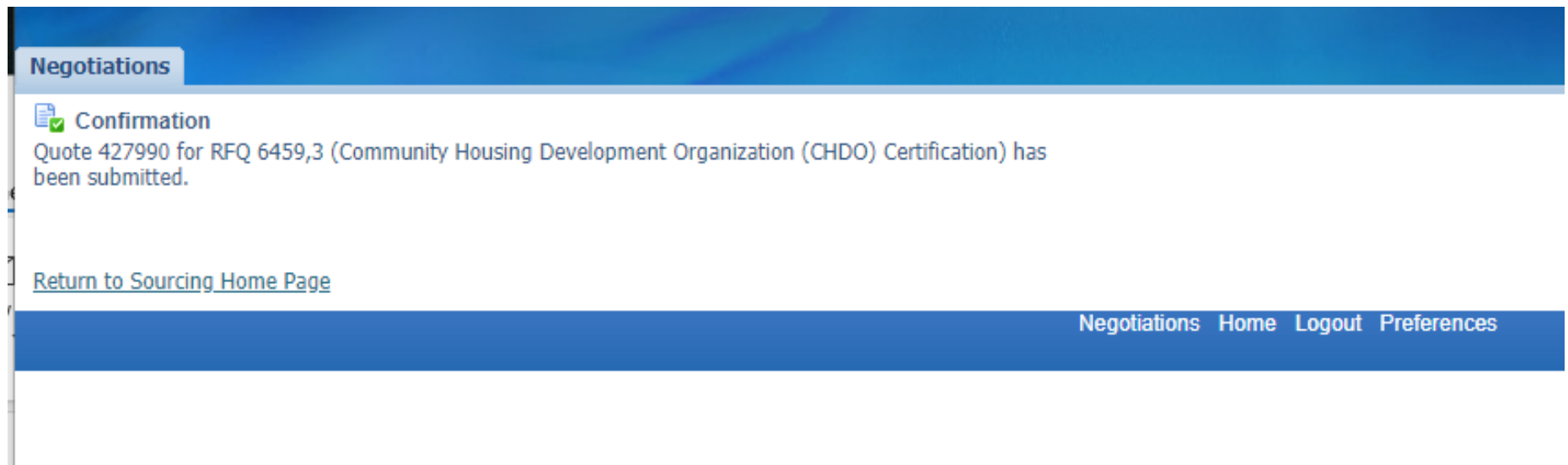
Before submitting the response please enter Name and Title and accept the disclaimer by checking the box above.

Cancel Back Validate Save Draft Printable View **Submit**



How to submit an application – Step 9

- Make sure that you see this submittal confirmation screen. The eProcurement system will send a confirmation email within 24 hours of your submission. Please call or email me if you desire confirmation prior to then.



Program Questions?

Stacy Subida

312-743-7272

Stacy.Subida@cityofchicago.org

For non-programmatic questions contact:

Julia Talbot

(312)-743-1679

Julia.Talbot@cityofchicago.org