

REQUEST FOR PROPOSAL

RFP #2025-02

Community Service Block Grant (CSBG)

Funding For Senior Services

Request for Proposal (RFP) Cover Page

Solicitation Issue Date: Friday June 13, 2025			
Solicitation Closing Date: Monday, July 14, 2025		Solicitation Closing Time: 2:00 PM (EST)	
Issued By: United Planning Organization (UPO)			
Address: 301, Rhode Island Ave, NW, Washington, DC 20001			
Telephone Number: 202-238-4600			
UPO is a non-profit agency in the District of Columbia, founded in 1962; exempt from all state or federal taxes.			
Responses must be received on or before Monday, July 14, 2025 , 2:00 PM (EDT.) in the Procurement Office, United Planning Organization, Washington, DC 20001.			
Electronic responses: Please submit your proposal to procurement@upo.org , referencing “ CSBG Funding for Senior Services RFP 2025-02 ” in the subject line.			
For questions/information, please e-mail Rizwanul Haque, Procurement Officer, at rhaque@upo.org referencing “ CSBG Funding for Senior Services RFP 2025-02 ”. For all technical questions, please e-mail Cynthia Senefiawo-Amedoda, Service Provider Manager at csenefiawo@upo.org with a copy to rhaque@upo.org , referencing “ CSBG Funding for Senior Services RFP #2025-02 ” in the subject line. All questions received will be answered within three (3) business days and the Q&A will be posted on the UPO website. Questions/information must be emailed no later than Wednesday, July 2, 2025 .			
A virtual Pre-Proposal Conference for prospective proposers will be held on Wednesday, June 25, 2025 at 10:00 am. Interested proposers should email rhaque@upo.org for the link to this meeting by 2:00 pm on Tuesday, June 24, 2025. Questions raised during this meeting will be answered in real time.			
United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all proposals received, to accept the proposal deemed best for the organization, and/or request new proposals, if necessary.			
Any objection to the above conditions must be clearly indicated in the proposals.			
In compliance with this RFP and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.			
Vendor Identification			
Company Name:			
Address:			
Telephone:			
Email:			
Print Name	Title	Authorized Signature	Date

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I. GENERAL INFORMATION

A. PURPOSE

As a recipient of Community Services Block Grant (CSBG) funding, the United Planning Organization (UPO) is issuing this Request for Proposals (RFP) seeking proposals from qualified and competent Community Based Organizations (CBOs) in providing select services to senior residents of the District of Columbia. CBOs must have been in business for at least three years to submit a proposal.

CBOs submitting proposals in response to this RFP must certify that services to be delivered will only target D.C. residents who are 60 years or older and who live at or below 200% of the federal poverty guidelines. The proposals must describe the comprehensive program plan to include how the expected senior services outcome will be achieved, the specific outcomes to be achieved by the customers, and the services and supports that will be provided to the customers to assist them in achieving the anticipated outcomes.

B. UPO BACKGROUND

UPO is a 501(c) (3) private non-profit corporation and the designated Community Action Agency for the District of Columbia, providing leadership, support, and advocacy to empower low-income residents of Washington, DC to become stable and achieve economic security. UPO operates a wide array of special activities and offers many supportive and instructional services including:

- Early Head Start, and other childcare programs that make measurable differences in the education of our youngest;
- Comprehensive youth services, including college scholarships for qualifying DC residents;
- Transportation services for persons experiencing homelessness;
- Training programs designed to prepare participants for skilled employment;
- Substance abuse treatment programs that assist individuals in overcoming addictions;
- Free tax preparation services for qualifying DC residents;
- Housing counseling services; and
- Job placement and career development services.

C. PROPOSER ELIGIBILITY

All proposers must be CBOs, and the programs and services will only be provided to the residents of the District of Columbia who meet the CSBG's eligibility guidelines.

D. CONTRACT PERIOD AND RENEWALS

The term of any contract resulting from this RFP will be from October 1, 2025, to September 30, 2026, or from the date the agreement is fully executed. The grant may be renewed for two (2) additional one-year terms, subject to satisfactory performance evaluation and availability of funds. The maximum grant award is up to \$200,000. This will be a performance-based agreement. Rates will be established for each proposed outcome. Any funds received may only be used to support the services and outcomes

as specified in the Program Outcomes Earnings Plan (POEP) submitted in the proposal package or as specified in the Scope of Work (SOW). The spending of funds for unapproved activities, including, but not limited to, planning, development, construction, or project start-ups may not be submitted for payment.

E. PRE-PROPOSAL CONFERENCE

A virtual Pre-Proposal Conference will be held on Wednesday, June 18, 2025, at 10:00 AM. Interested proposers should e-mail Procurement Officer Rizwanul Haque at rhaque@upo.org latest by Tuesday, June 17, 2025, to receive the link to the meeting.

F. QUESTIONS AND ANSWERS

Proposers should e-mail all questions or request for information concerning this RFP to Procurement Officer Rizwanul Haque at rhaque@upo.org no later than Friday, June 27, 2025. Responses to questions received will be posted on the UPO website within three (3) business days.

For all technical questions regarding the Program Outcome Earning Plan (POEP), please e-mail Cynthia Senefiawo-Amedoda, Service Provider Manager, at csenefiawo@upo.org with a copy to Rizwanul Haque, Procurement Officer.

Please reference “RFP 2025-02 Funding for Senior Services” in the subject line on all e-mails.

G. GENERAL REQUIREMENTS

To be considered for selection, proposers must submit one (1) complete response to this RFP. Proposals must be submitted electronically to UPO at procurement@upo.org. Electronic submissions may be made either through email or file sharing. File sharing through websites such as Dropbox, is permitted but must be well timed to meet submission deadlines. Any technical issues with electronic submissions are the sole responsibility of the proposer and no additional time for submission will be permitted for any such technical issues.

No other distribution of the proposals shall be made by the proposer. Multiple submissions will not be accepted from the same proposer.

The submitted proposal must be signed by an authorized representative of the organization. Proposers are encouraged to submit a complete response package to include all the documents required on the Submission Checklist. Failure to submit a complete response package may result in a rejection of the submission or a reduced proposal evaluation score.

The proposal response must appear on standard 8.5” X 11” pdf format using 12-point font minimum type. Proposals must be organized and presented in the order represented in the RFP. Ownership of all data, materials and documentation originated and prepared for this RFP by any proposer shall belong exclusively to UPO.

H. SUBMISSION: DATE, TIME & LOCATION

Complete Proposals must be received by or before Monday, July 07, 2025 (2:00 pm EST). Changes to the proposal will not be allowed after submission unless requested by UPO. Electronic submissions may be made either through email or file sharing to procurement@upo.org. File sharing through websites such as Dropbox is permitted but must be well-timed to meet the submission deadlines. Any technical issues with electronic submissions are the sole responsibility of the proposer and no additional time for submission will be permitted for any such technical issues.

I. PROPOSAL REVIEW & SCORING CRITERIA

Proposals will be scored based on the criteria below. Upon completion of each review, score totals will be tabulated, and preliminary recommendations will be deliberated by the review panel.

The Scoring Table below indicates the highest possible score for each section of the proposal to total a possible score of 100 points.

PROPOSAL EVALUATION & SCORING FY 2026 Request for Performance-Based Proposals		POSSIBLE POINTS
ABSTRACT		5
ORGANIZATIONAL MISSION		5
TARGET POPULATION AND NEED FOR THE PROGRAM		10
SPECIFIC SERVICES AND OUTCOMES		15
PROGRAM LINKAGES		5
PROGRAM ORGANIZATIONAL STRUCTURE AND OPERATIONS		15
PROGRAM LOCATION AND FACILITY CONDITIONS		5
PAST PERFORMANCE		5
REPORTS AND RECORDS		5
PROGRAM OUTCOME EARNING PLAN (POEP)		30
ATTACHMENTS		<u>Included</u>
TOTAL SCORED POINTS		<u>100</u>

Note: There are a maximum of 100 points. UPO reserves the right to accept or reject any proposal.

J. DECISION ON AWARDS

The recommendations of the Review Panel will be reported to the UPO Board of Directors. The Board will make the final approval of awards.

II. SCOPE OF WORK

The United Planning Organization (UPO) is seeking to retain a vendor to provide tailored services and training to eligible DC senior (60+ years) residents to advance self-sufficiency and economic security in accordance with the CSBG Act of 1998. The qualified Vendor hereinafter referred to as the Service Provider, shall perform these services in a manner that is satisfactory to low-income seniors who meet the following eligibility criteria:

1. DC residency
2. Current income does not exceed 200% of the current federal poverty guideline issued by the United States Department of Health and Human Services (USDHHS).
3. Proof of picture ID.

III. CONTRACT PERIOD

The contract resulting from this RFP, when awarded, will be for the performance period of October 1, 2025 through September 30, 2026, renewable for two (2) successive option years or part thereof, contingent on satisfactory performance, evaluation, and availability of funds.

IV. SERVICE CATEGORIES

The selected Service Provider will be responsible for providing at least two (2) or more services in the service categories below:

- Health Promotion and Wellness.
- Medical Care: Periodic health screenings and/or check-ups.
- Chronic disease management and medication management.
- Fitness Programs: Exercise classes, yoga, and/or physical therapy sessions.
- Nutrition Education/Counseling: Dietary planning and meal preparation assistance.
- Mental Health Services: Individual and/or group counseling, therapy, and support groups.
- Social and Recreational Activities/Services
- Community Events: Social gatherings, cultural events, and holiday celebrations.
- Recreational Activities: Games, arts and crafts, and hobby clubs.
- Outings: Organized trips to museums, parks, and other local attractions.
- Support Services ▪ Transportation: Shuttle services for medical appointments, shopping, and social activities.

- Benefit Programs: Assistance with applying for government benefits such as Social Security, Medicare, and Medicaid.
- Advocacy: Representation and support in accessing benefits and services.
- Applied Technology Training: Basic Computer Literacy Classes, smartphone usage, and internet usage.
- Financial Literacy: Workshops on budgeting and managing finances.

V. PROPOSAL NARRATIVE AND ORDER

The Narrative Section should not exceed twenty-five (25) pages. The pages of the proposal must be numbered, and the pages should be organized in accordance with the Scoring Table noted above. Proposals received that are not in the prescribed order may be eliminated from consideration.

A. LETTER OF TRANSMITTAL

The letter of Transmittal must be signed by the authorized representative of the proposing organization.

B. VENDOR IDENTIFICATION FORM

The Vendor Identification Form, Attachment A, must be completed, signed and dated.

C. TABLE OF CONTENT

The proposal package must include a Table of Contents, cross-referencing the page numbers.

D. ABSTRACT

The Abstract should be no longer than one page and must include the following sub-subsections:

1. A brief description of your organization including your efforts to address poverty in the District of Columbia and to help residents become stable and achieve economic security; A description of the organization to include how the organization works to address poverty in the District of Columbia and to move residents to achieve economic security.
2. The program focus area(s) and program indicator(s) you will address.
3. A brief description of proposed program or service;
4. The target population(s).
5. The need for the proposed program; Justification of the need for the program.
6. If working in partnership with another CBO, provide the name and the program functions that the partner organization will be responsible to provide.
7. State the Contract Period, which must be from October 1, 2025, to September 30, 2026. Programs must be in full operation during the entire Contract Period.

8. The physical location(s) where services will be delivered in Washington, DC and the hours of operation for each site.
9. The amount of funding requested based on the accompanying Program Outcomes Earnings Plan (POEP).

E. ORGANIZATIONAL MISSION

The Organizational Mission should elaborate on the organization's mission and how it aligns with the purpose of CSBG funding. Also, expand upon what makes the organization or program a leader in servicing low-income Senior (60+ years) residents of Washington, DC.

F. TARGET POPULATION AND NEED FOR THE PROGRAM

The population to be served should only include low-income Seniors who are residents of DC and whose family income does not exceed 200% of the federal poverty guidelines, though this requirement does not prevent the organization from providing services to families whose income exceeds the poverty guideline. Please provide the following:

1. Explain the method that will be used for administrative record keeping and that will provide proof that eligibility for each customer was verified using the CSBG eligibility criteria prior to the receipt of services.
2. Provide the demographic data, DC Ward(s) to be served, the percentage of the target population the program will address and the total number of individuals and families to be served.
3. Provide a detailed discussion of the need(s) for the proposed services, providing a named reference for all the data and information collected and researched to support the identified need(s) with footnotes or endnotes.
4. Justification of the selection of the target population and approach proposed.
5. Provide justification of the selection of the targeted population and how the proposed approach to the provision of services will differ from existing services.

G. SPECIFIC OUTCOMES AND SERVICES (SCOPE OF WORK)

The National Performance Indicators (NPIs) as identified by the CSBG Annual Report define the outcomes to be achieved, as well as state individual and family services (SRVs) to be provided. These indicators are listed on the Program Outcome Earning Plan (POEP) and include the domains as: Education and Cognitive Development; Health and Social/Behavioral Development; and Services Supporting Multiple Domains.

The Program Outcome Earning Plan (POEP), Attachment X, should specify the planned services and outcomes consistent with one or more of the NPIs and corresponding SRVs. The rate of pay by unit must be indicated for each service and outcome.

The POEP should include a detailed accounting of how the total amount of the proposal will be earned. The POEP and the instructions can be downloaded from <https://www.upo.org/rfp-rfqs/>

The POEP is a self-calculating Microsoft Excel spreadsheet. The instructions are listed as a Microsoft Word document. Complete the POEP in its entirety and include the document in the proposal package.

A listing of selected modules, indicators, services, and rates has been entered on the form to offer suitable choices. You may use only those program indicators and service measures listed. The proposer should propose strategies that address one or more of the selected NPIs and corresponding SRVs.

Performance indicators must have quantifiable outcomes. Be mindful of the needs of the customers when determining the types of services, the program will offer.

With reference to a completed copy of the POEP spreadsheet, state what is the NEED for the program, clearly define the overall purpose of the program and identify the specific services and outcomes that your CBO will deliver to customers. This portion of the proposal must also:

1. Discuss why the National Performance Indicators (services and outcomes) were selected.
2. Explain how these methods are innovative or unique and different from services provided to the target population or area by existing organizations.
3. Provide a detailed description of the program's implementation. Specify the activities and time frames to be performed by your staff, and services to be provided to customers participating in the program. Identify where the work is to be performed, time frame and mode of instruction or service, i.e., hours of operation-weekday, evening, weekend.
4. Demonstrate how services provided are consistent with staffing, organizational capacity, history, organizational accomplishments, and the POEP, Attachment E. Programs that include Education and Cognitive Development must include the training curriculum and a proposed monthly schedule of training classes. Programs that include Mental/Behavioral Health services for substance abuse counseling (individual and/or group) or mental health counseling (individual and/or group) must include the nature of the sessions and be conducted by state certified health professionals.

H. REPORTS AND RECORDS

The proposal should address the following record keeping and reporting requirements. This section should include a detailed description of the procedure used for ensuring the accuracy of records documenting services and outcomes.

The proposal should describe the method used for record keeping with specific attention to confidentiality and the security of employee and customer Personally Identifiable Information (PII) and the process for allowing Program Monitors access to records.

The CBO must have reliable internet access. Recipients will be required to enter program data into EmpowOR, UPOs web-based customer data reporting system. Recipients are expected to fully utilize the EmpowOR reporting system. UPO will provide the mandatory training that will be required.

Recipients will be required to maintain a hard copy of all reported outcomes.

The following is a list of the reports that must be submitted to UPO:

- Monthly Program Outcome Earnings Report (POER).
- Monthly EmpowOR data entry for all reportable activities completed during the month;
- Quarterly Progress and Financial Reports to include a Case Study and a Success Story;
- Final Report which must summarize all program deliverables inclusive of program modifications, if applicable, and a complete financial summary.

I. MONITORING & EVALUATION

Describe the system and process used to monitor program and personnel records and the quality management plan implemented to correct deficiencies in a timely manner. Upon notification of an award, recipients will be expected to comply with regularly scheduled monitoring events conducted by UPO. Technical assistance will be available to all recipients as requested.

Specifically, detail the process to be used to monitor and verify the following:

1. The method to be used to collect, assess and document outcomes and services and the process to evaluate goals achieved.
2. How the income and DC residency status for each customer will be verified and documented.
3. Identify the means to collect, assess and document outcomes and services to ensure goal attainment and achievement of projected outcomes and services.
4. State how low-income level would be tracked and DC residency verified.
5. The evaluation or quality management plan should focus on linkages, efficiencies, and measures of customers' pre-and post-outcomes.

J. PROGRAM LINKAGES

To achieve planned outcomes, proposers are highly encouraged to form coalitions and/or partnerships with private companies, governmental entities, other non-profit organizations as well as UPO Community Service Centers, Head Start, and other UPO funded programs. Note, however, that UPO will not pay your organization for work fully completed by a partner or organization in the absence of an MOU demonstrating consent by the partner organization. The performance-based agreement to be issued by UPO will only compensate Recipients for work done by its staff and volunteers, and/or purchases made for the specific program under the Agreement. UPO will **not** compensate the Recipient for work fully completed by a partner organization, nor will any partner organizations be eligible for compensation under the performance-based agreement. Similarly, UPO will not compensate for services that are available for free to DC residents.

In this section of your proposal, describe the following:

The program's relationship to other organizations and programs within the community; and the relationship of the program's goals to the proposed strategies for assisting customers to become stable and achieve economic security. Attachment B, Coordination and Linkages is provided for use in documenting these relationships. This form must be completed and attached to your proposal.

K. PROGRAM ORGANIZATIONAL STRUCTURE AND OPERATIONS

The organizational structure and operations section of the proposal should provide an overview of personnel whose work will be funded thru this grant funding. The following outlines the information that must be included in the proposal:

1. Organizational Chart should be labelled as (Attachment G), which clearly identifies all program staff and personnel by name and position title. All vacant positions should be represented on the chart and should be designated as "vacant" or "to be hired".
2. Current Job Descriptions describing the relevant qualifications for all personnel assigned to the program and should be labeled as Attachment H-Position Descriptions.
3. A current resume for all staff and personnel assigned to the program and labeled as Attachment I-Staff Qualifications. Resumes should not exceed two pages. For Recipients, as new personnel are hired, the resumes should be provided to the UPO Monitor.
4. A Capabilities Statement to demonstrate that the organization has sufficient staffing and the capacity to support 60 or more customers, and that the organization understands the UPO requirements.

L. PROGRAM LOCATION AND FACILITY CONDITION

Provide the physical address and a description of the facility(ies) that will be utilized during the Contract Period. All facilities must be in compliance with DC licensing, health, sanitization, fire, building and zoning codes and the American with Disabilities Act (ADA) regulations. All facilities must be suitable for the program purpose and present a safe environment for employees and customers.

Evidence of a Department of Licensing and Consumer Protection (DLCP) inspection or certification and an Occupancy Authorization Letter, Attachment C, must be included in the proposal.

M. PAST PERFORMANCE

Describe any past grants the organization has received from UPO for any funding amount or other funding sources that were in excess of \$100,000 and discuss the experience the organization had

working under a performance-based agreement. Indicate whether any of the experience involves a program similar to that being proposed in response to this RFP.

A completed Notice of Past Performance, Attachment D, to include the funder, the funding amount, the Contract Period, partners (if applicable), specific outcomes achieved and the overall results of the program.

VI. REQUIRED ATTACHMENTS

The Organization/Agency Checklist, Attachment F, provides the list of all of the required documents that must be included in the proposal package. Each document must be clearly labeled and placed in the order presented below:

If awarded the grant additional pre-contract documentation and certifications will be required.

Provide the following required documents in the order listed below:

A. CORPORATE DOCUMENTS

<u>Label As:</u>	<u>Document</u>
Attachment 1.	IRS Tax Exempt Status Verification (IRS Tax Exempt Determination Letter or IRS Affirmation Letter)
Attachment 2.	Most recent audited Financial Statements or most recent unaudited Financial Statements compiled by a CPA.
Attachment 3.	Most recently filed IRS 990 Federal Tax Return
Attachment 4.	A copy of current D.C. Basic Business License
Attachment 5.	A copy of the current certificate of liability insurance evidencing coverage of the minimum required in this RFP. See Section IV-D of this RFP.
Attachment 6.	Completed and signed ACH Form
Attachment 7.	Completed and signed W-9 Form
Attachment 8.	COVID 19 Pandemic Acknowledgement Form (to be confirmed from OLA-Pamela)

B. NARRATIVE DOCUMENTS

<u>Label As:</u>	<u>Document</u>
Attachment A	Vendor Identification Form
Attachment B	Coordination & Linkages

Attachment C	Occupancy Authorization Letter
Attachment D	Notice of Past Performance
Attachment E	Program Outcome Earnings Plan (POEP) and Instructions (See Section II, G. Specific Outcomes and Services for access to POEP and Instructions)
Attachment F	Organization/Agency Checklist
Attachment G	Organizational Chart
Attachment H	Position Descriptions
Attachment I	Staff Qualifications

VII. PROVISIONS TERMS AND CONDITIONS

All Agreements resulting from this RFP shall be subject to, but not limited to, the below terms and conditions, and receipt by UPO of the below Certifications. Additional terms and conditions will be set forth in the Agreement to be signed by the authorized representatives.

A. PAYMENT

Payments under this Agreement are performance-based and will be processed monthly. Services must be rendered during the term of the Agreement. Service Providers will submit the prior month's Program Outcome Earnings Report (POER) by no later than the fifth (5th) day of each month. If the 5th day falls on a weekend, the report shall be due the Friday before. The amount payable to the Provider will be the Provider's cumulative earnings to date, less the total amount previously paid to the Provider. At no time will the Provider be paid more than the cumulative planned earnings through the end of the quarter. UPO shall issue an ACH payment to the Service Provider within thirty (30) calendar days following UPO's approval of the Provider's submission of a complete report package, inclusive of the POER. The Service Provider shall repay UPO if UPO overpays the Provider or if a payment for services is subsequently disallowed.

B. MONITORING AND ASSESSMENT

UPO shall monitor and assess the Service Provider's CSBG Program and will confer with the Provider's staff, as necessary. The Provider agrees to cooperate with UPO and with any other organization or individual engaged by UPO for this purpose. UPO has the right, at all reasonable times, to inspect or otherwise monitor and assess the work performed, or being performed, and the premises in which said work is being performed, or when deemed necessary by UPO. Any inspection or monitoring and assessment shall be performed in such a manner as will not unduly interfere with the work of the Service Provider. However, inspections, monitoring, and assessments may be conducted on an announced or unannounced basis.

C. AUDITS

The Service Provider shall make or cause to be made an independent annual audit of the Service Provider's financial statements for the 2023-2024 program year covered under the Agreement in accordance with the "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards." (45 C.F.R. Part 75).

By no later than five (5) months after the end of the Service Provider's fiscal year the Provider shall provide UPO with two (2) copies of the Service Provider's board approved audited financial statement, Single Audit report (as applicable - if Provider has federal award expenditures of \$750,000 or more during the fiscal year – 45 C.F.R. Part 75, Subpart F), and management letters. The Service Provider's financial records, including audited financial statements, tax returns and any management letters, must be available for review by UPO auditors on an annual basis when requested. Where the Service Provider receives contributions from sources other than UPO, UPO shall have the right to inspect and audit the pertinent books and records of the regarding transactions related to such other contributions.

At any time or times before final payment and three (3) years thereafter, UPO may require an audit of the Service Provider.

D. INSURANCE

1. The Service Provider shall procure and maintain, during the entire Contract Period under this Agreement. All insurance shall be written with responsible companies authorized to do business in the District of Columbia. The Service Provider shall provide UPO with Certificate of Insurance giving evidence of the required coverage prior to commencing work under the Agreement. All insurance certificates provided by the Provider, except Workers' Compensation Insurance, shall indicate that UPO is an additional insured and will provide for at least thirty (30) days written notice to UPO if coverage is reduced, expires, or is canceled. In the event of any other amendments or changes in coverage, the Service Provider shall notify UPO of such amendment or change within ten (10) business days thereof. Commercial General Liability Insurance. The Service Provider shall carry commercial general liability coverage of at least one million dollars (\$1,000,000) per occurrence; two million dollars (\$2,000,000) aggregate; bodily injury and property damage, including, but not limited to: premises operation; broad form property damage; products and completed operations; personal and advertising injury; contractual liability and independent contractors.
2. Automobile Liability Insurance. The Service Provider shall provide automobile liability insurance to cover all owned, hired, or non-owned motor vehicles in conjunction with the services performed under this Agreement. The policy shall provide a one million dollars (\$1,000,000) per occurrence combined single limit for bodily injury and property damage.

3. Workers' Compensation Insurance, including Employer's Liability. The Service Provider shall provide Workers' Compensation insurance in accordance with the statutory mandates of the District of Columbia. The policy shall provide for five hundred thousand (\$500,000) per accident for injury, five hundred thousand (\$500,000) per employee for disease with a five hundred thousand (\$500,000) policy limit for disease.
4. Professional Liability (Errors & Omissions). The Service Provider shall provide Professional Liability Insurance to cover liability resulting from any error or omission in the performance of professional services under this Agreement. The policy shall provide limits of one million dollars (\$1,000,000) per claim.
5. Property Insurance. The Service Provider shall carry All Risk or broad form property insurance for the building and facilities where services will be rendered on a replacement cost basis.

E. CERTIFICATIONS

1. Certification of Debarment, Suspension, Ineligibility and Voluntary Exclusion—Lower Tier Covered Transactions
2. Certification Regarding Lobbying
3. Certification for Contracts, Loans and Cooperative Agreements
4. Certification Regarding Drug-Free Workplace
5. Certification Regarding Environmental Tobacco Smoke
6. Statement of Compliance with Applicable Federal, State Statutes and Regulations

F. GOVERNANCE AND CORPORATE VIABILITY

The Service Provider must comply with their Articles of Incorporation, bylaws, and the laws and regulations. The Provider shall be financially viable. The Service Provider shall report to UPO the initiation by or against the Service Provider of any legal or administrative proceedings or pending regulatory or other investigations (the Inspector General, etc.) or license(s) suspension or revocation, inclusive of citations, related to or affecting this Service Agreement

H. PRIVACY AND CONFIDENTIALITY

The Service Provider shall maintain confidentiality regarding customers served under the Agreement, including but not limited to customer personal information and files. All Service Providers must have a confidentiality policy applicable to all personal information of customers served through its programs which includes a provision for written notice to the customer or guardian of uses and disclosures of the personal information. The Service Provider shall provide access and/or disclose confidential customer information only to properly authorized persons. The Service Provider shall observe and abide by all applicable local, state, and federal statutes and regulations regarding use or disclosure of customer information.

I. SMOKE FREE WORKPLACE

The Service Provider must comply with Public Law 103-227, Part C - Environmental Tobacco Smoke, also known as the Pro-Children Act of 1994 (Act), as amended.

J. TERMINATION

1. Termination for Convenience of UPO

UPO may terminate performance of work under the Agreement in whole, or in part, if the UPO Board of Directors (“Board”) determines that a termination is in the best interest of UPO. UPO shall terminate the Agreement by delivering a Notice of Termination to the Service Provider specifying the extent of the termination and the effective date. After receipt of Notice of Termination, and except as directed by UPO, the Service Provider shall immediately proceed with the following obligations: stop work as specified in the notice; and incur no further expenses or obligations. UPO shall pay the Service Provider for all services/outcomes satisfactorily completed through the termination date consistent with the terms of the Agreement.

K. CSBG GRANT TERMS AND CONDITIONS

Funds under this award will be made available for expenditure in accordance with Title II of Public Law 105-285 - Coats Human Services Reauthorization Act of 1998 (42 U.S.C. § 9901 *et seq.*; 45 C.F.R. Part 96), as amended,) and are subject to all of the applicable CSBG laws, regulations, guidelines or other actions which may be adopted by the U.S. Department of Health and Human Services, D.C. Department of Human Services or UPO.

VIII. ATTACHMENTS

Attachment A: Vendor Identification Form

Organization's Name:	
Company Federal ID:	
Address:	
Remit to Address	
Telephone:	
Email:	
Web address:	
Primary Contact Person	Name:
	Title:
	Phone No.:
	E-Mail Address:
Signature and Title of Authorized Agent	Name:
	Title:
	Signature:

Attachment B: Coordination and Linkages

DOCUMENTATION OF COORDINATION AND LINKAGES

Applicant _____ has established partnerships, collaborations and/or relationships with the following UPO programs and other organizations/agencies in an effort to decrease the duplication and fragmentation of services and to improve coordination and linkages between programs and projects, designed to address the needs of the low-income D.C. resident.

Under “Link with current program” check yes to indicate that the listed UPO programs and other organizations/agencies have a current working relationship (i.e., exchanging referrals, conducting regular review and/or strategy sessions, providing direct services or performing other services in support of the proposed program or project).

UPO FUNDED PROGRAMS

Name of UPO Program	Name & Title UPO Program Representative	Link with current program*	
		Yes	No

OTHER PARTNERS, COLLABORATORS & RELATED ORGANIZATIONS

Name of Organization or Agency	Name & Title Program Representative	Link with current program	
		Yes	No

Attachment C: Occupancy Authorization Letter

Use the language set below and submit on Landlord's Stationery addressed to:

UPO Procurement Officer

301 Rhode Island Avenue, N.W.

Washington, D.C. 20001

Or submit on this form with original signatures.

_____ is authorized to utilize the premises of
[Name of Organization, Agency, or Program]

(Street Address)

Suite/Floor/Room

City/State/Zip Code

For the period of _____ to _____ for the following purpose(s) of the program:

The facility is safe and conforms to health, sanitation, fire, licensing, zoning, and building codes as established and regulated by the D.C. Department of Consumer and Regulatory Affairs (D.C. D.C.R.A.).

The D.C. D.C.R.A. certificate of occupancy and current inspection certificates are maintained by the landlord and will be made available to UPO upon request.

It is agreed that _____ is permitted to utilize the premises at:

_____ cost or no cost (circle one),

for the purpose(s) mentioned above.

Sincerely,

(Landlord's signature)

(Landlord's Printed Name)

Attachment D: Notice of Past Performance

Please indicate whether your organization has received funding through the UPO within the last three fiscal years. If yes, please provide the number of planned and actual outcomes achieved for each year.

- ☐ Organization has not received funding through UPO since FY 2021
- ☐ Organization has received funding through UPO for the following fiscal years:

Fiscal Year	Planned Outcomes	Actual Outcomes
2022 (October 1, 2021-September 30, 2022)		
2023 (October 1, 2022-September 30, 2023)		
2024 (October 1, 2023-Septmber 30, 2024)		

Non-UPO Prior Performance Based Programs (more than \$100,000)

Programs	Funding Source	Amount	Planned Outcomes	Actual Outcomes
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NOTE: The information provided on this form is subject to verification.

Attachment E: Program Outcome Earnings Plan (POEP)

Download the POEP and Instructions from UPO's website at <https://www.upo.org/rfp-rfqs/> and click on [RFP 2025-02 POEP and Instructions].

The Plan is a self-calculating Microsoft Excel spreadsheet. The instructions are in a Microsoft Word document. Complete the Plan in its entirety, print and include it in your proposal as Attachment E.

Attachment F: Organization/Agency Checklist

It is required that you complete this checklist to assure that all components of your submission have been included. Note full instructions and specification in Section III Required Attachments of the RFP.

Type	Documents	Labeled As Attachment	Check If Attached
General			
	Proposal Narrative Section II A-N		
Corporate			
	IRS Tax Exempt Status Verification	1	
	Audited or Current Financial Statements	2	
	Most Recent IRS 990 Tax Return	3	
	Current DC Basic Business License	4	
	Certificate of Liability Insurance	5	
Narrative			
	Vendor Identification Form	A	
	Coordination & Linkages	B	
	Occupancy Authorization Letter	C	
	Notice of Past Performance	D	
	Program Outcome Earnings Plan (POEP) and Instructions	E	
	Organization/Agency Checklist	F	
	Organizational Chart – (Included & Labeled G)	G	
	Position Descriptions – (Included & Labeled H)	H	
	Staff Qualifications – (Included & Labeled I)	I	
Certifications			
	Certification of Debarment, Suspension, Ineligibility and Voluntary Exclusion	J	
	Certification Regarding Lobbying	K	
	Certification for Contracts, Loans and Cooperative Agreements	L	
	Certification Regarding Drug-Free Workplace	M	
	Certification Regarding Environmental Tobacco Smoke	N	
	Statement of Compliance with Applicable Federal, State Statutes and Regulations	O	

**Attachment J: Certification of Debarment, Suspension, Ineligibility and Voluntary Exclusion—
Lower Tier Covered Transactions**

- (1) The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal or District department or agency.
- (2) Where the prospective lower tier participant is unable to certify to any of the statements on this certification, such prospective participant shall attach an explanation to this proposal concerning each statement to which certification has not been made.

The prospective lower tier participant certifies that neither it nor its principals are on the consolidated List of Debarred, Suspended or Ineligible Contractors prepared by the General Services Administration, the Department of Housing and Urban Development or other Federal or District department or agency.

Signature

Printed Name and Title of Authorized Signatory

Date

Attachment K: Certification Regarding Lobbying

The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreements, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of /Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature

Print Name and Title of Authorized Signatory

Date

Attachment L: Certification for Contracts, Grants, Loans and Cooperative Agreements

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreements, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of /Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

Signature

Printed Name and Title of Authorized Signatory

Date

Attachment M: Certification Regarding Drug-Free Workplace

By signing and submitting this grant application, the applicant, in accordance with 28 CFR Part 83, certifies that it will provide a drug-free workplace by:

- (a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition,
- (b) Establishing a drug-free awareness program to inform employees about:
 - (1) The dangers of drug abuse in the workplace.
 - (2) The applicant's policy of maintaining a drug-free workplace.
 - (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
 - (4) The penalties that may be imposed upon employees for drug abuse violation occurring in the workplace.
- (c) Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a) above.
- (d) Notifying the employee in the statement required by paragraph (a) above, that as a condition of employment under the grant, the employee will:
 - (1) Abide by the terms of the statement; and
 - (2) Notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five days after such conviction.
- (e) Notifying the agency within ten days after receiving notice under subparagraph (d) (2) above, from an employee or otherwise receiving actual notice of such conviction.
- (f) Taking one of the following actions, within 30 days of receiving notice under subparagraph (d) (2) above, with respect to any employee who is so convicted:
 - (1) Taking appropriate personnel action against such an employee, up to and including termination; or
 - (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency; and
- (g) Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e), and (f) above.

Signature

Printed Name and Title of Authorized Signatory

Date

Attachment N: Certification Regarding Environmental Tobacco Smoke

Public Law 103-227, also known as the Pro-Children Act of 1994 (Act), requires that smoking not be permitted in any portion of any indoor facility owned or leased or contracted for by an entity and used routinely or regularly for the provision of health, day care, early childhood development services, education or library services to children under the age of 18, if the services are funded by Federal programs either directly or through State or local governments, by Federal grant, contract loan, or loan guarantees. The law also applies to children's services that are provided in indoor facilities that are constructed, operated, or maintained with such Federal funds. The law does not apply to children's services provided in private residence, portions of facilities used for inpatient drug or alcohol treatment, service providers whose sole source of applicable Federal funds is Medicare or Medicaid, or facilities where WIC coupons are redeemed. Failure to comply with the provisions of the law may result in the imposition of a civil monetary penalty of up to \$1000 for each violation and/or the imposition of an administrative compliance order on the responsible entity.

By signing the certification, then undersigned certifies that the applicant organization will comply with the requirements of the Act and will not allow smoking within any portion of any indoor facility used for the provision of services for children as defined by the Act.

The applicant organization agrees that it will require that the language of this certification be included in any sub-awards which contain provisions for children's services and that all sub-recipients shall certify accordingly.

Signature

Print Name and Title of Authorized Signatory

Date

Attachment O: Statement of Compliance with Applicable Federal, State Statutes and Regulations

By signing this statement, the undersigned certifies that the applicant organization is and will continue to be in compliance with all applicable Federal and District statutes and regulations as amended, including but not limited to:

- (1) The Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq., and applicable regulations.
- (2) Title VI of the Civil Rights Act of 1964, 42 U.S.C. §§ 2000d et seq., as amended, and applicable regulations at 45 C.F.R. Part 80 (Nondiscrimination Under Programs Receiving Federal Assistance Through the Department of Health and Human Services Effectuation of Title VI of the Civil Rights Act of 1964)(USDHHS).
- (3) Equal Employment Opportunity, Title VII of the Civil Rights Act of 1964, 42 U.S.C. §§ 2000e et seq., and applicable regulations.
- (4) Equal Pay Act of 1963, 29 U.S.C. § 206(d), and applicable regulations.
- (5) Rehabilitation Act of 1973, Pub. L. 93-112, as amended by the Rehabilitation Act of 1974, Pub. L. 93-516, 29 U.S.C. § 794 (Section 504) and the applicable regulations at 45 C.F.R. 84 (Nondiscrimination on the Basis of Handicap in Programs and Activities Receiving Federal Financial Assistance) (USDHHS).
- (6) Title IX of the Education Amendments of 1972, Pub. L. 92-318, as amended by Section 3 of Pub. L. 93-568, 20 U.S.C. §§ 1681 – 1688, and the applicable regulations at 45 C.F.R. Part 86 (Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving or Benefiting from Federal Financial Assistance) (USDHHS).
- (7) The Age Discrimination in Employment Act of 1967, 29 U.S.C. §§ 621 et seq., and applicable regulations.
- (8) The Age Discrimination Act of 1975, 42 U.S.C. §§ 6101 et seq., and applicable regulations at 45 C.F.R. Part 90 (Nondiscrimination on the Basis of Age in Programs and Activities Receiving Federal Financial Assistance) and Part 91 (Nondiscrimination on the Basis of Age in HHS Programs or Activities Receiving Federal Financial Assistance) (USDHHS).
- (9) Equal Treatment for Faith-Based Organizations, 5 U.S.C. § 301, and applicable regulations at 45 C.F.R. Part 87 (Equal Treatment for Faith-Based Organization) (USDHHS).
- (10) Hatch Act, 42 U.S.C. § 9918(b)(1) and 5 U.S.C. § 1501 et seq.
- (11) The Living Wage Act of 2006 Title I, D.C. Law No.16-118, (D.C. Official Code §§ 2-220.01-11).
- (12) Act 20-426, “Wage Theft Prevention Amendment Act of 2014” (D.C. Official Code § 32-1301).

Signature

Print Name and Title of Authorized Signatory

Date