



UNION COUNTY HUMAN SERVICES

Department of Job and Family Services
Senior Services
Union County Agency Transportation Service (UCATS)

940 London Ave., Suite 1800
Marysville, Ohio 43040

P 937.644.1010
F 937.644.8700

NOTICE – REQUEST FOR SEALED PROPOSALS **Union County Human Services**

Senior Sales Tax Levy Community Grants for 2027

Proposal Due Date: September 14th, 2026

The Board of County Commissioners acting through Union County Senior Services (UCSS), is now accepting sealed proposals for Senior Sales Tax Levy Community Grants for the 2027 calendar year from organizations that wish to provide services that will help the senior population of Union County to live safely and independently in their homes.

The complete Request for Proposals (RFP) is available online on Union County Senior Services' website <https://www.unioncountyohio.gov/senior-services-home>, upon request, by email to union_accts_recv@jfs.ohio.gov.

Submit sealed proposals by September 14, 2026, at 4.30 P.M. to the address or email listed below with the subject line: Senior Sales Tax Levy Community Grants.

Union County Senior Services
PO Box 389
Marysville OH 43040
Email: union_accts_recv@jfs.ohio.gov

The name of each Request for Proposal (RFP) responder will be publicly announced at that time. Union County reserves the right to contract with multiple organizations in a service category. Union County may award contracts to the responders whose proposal is the most advantageous to Union County Senior Services taking into consideration the evaluation factors and criteria in the complete RFP. Union County may award contracts in whole or in part to one or more offerors. Union County reserves the right to reject any or all proposals.

Union County Senior Services, 940 London Avenue, Suite 1800, Marysville, OH, 43040, is responsible for the publication of this Notice.

Table of Contents

Overview and Background	3
RFP Release and Deadlines	3
RFP Review and Selection Process	3
RFP Response Components, Requirements, and Options	3
Proposal Format	12
Evaluation Criteria	12
Terms, Conditions, Limitation, and Exceptions	13
Conditions of Participation	16

Union County Senior Services Request for Proposals (RFP)

Overview and Background

Union County Senior Services uses funding from the Union County sales tax levy as well as federal and state funding to provide a variety of services to enable seniors to live safely and independently in their homes. Union County Senior Services will make available approximately \$200,000 in funding.

The Board of County Commissioners, Union County, Ohio, acting through Union County Senior Services is seeking sealed proposals under Ohio R.C. §307.862 from qualified RFP responders (Responders) to meet the objectives of the Union County sales tax levy that wish to provide services that will help the senior population of Union County to live safely and independently in their homes.

RFP Release, Deadlines, and Timetable

RFP Release Date – Friday, August 14, 2026

RFP Submittal Deadline – 4:30 pm, Monday, September 14th, 2026

Proposal Review and Selection Process

Union County Senior Services anticipates a four-week timeline to conduct the proposal review and selection process. Union County Senior Services reserves the right to reject any or all proposals or portions of proposals as determined by Union County Senior Services. Union County Senior Services reserves the right to conduct post-proposal discussions with any Responder(s). Union County Senior Services reserves the right to short list the submitted proposals and conduct a panel review. During this process, Responders may be asked to formally present their proposals to Union County Senior Services. Union County Senior Services may award a contract to the Responder whose proposal is determined to be the most advantageous to the county, taking into consideration the evaluation factors and criteria set forth in the request for proposals. Union County Senior Services may award a contract in whole or in part to one or more responders. Union County Senior Services reserves the right to contract with multiple organizations in a service category.

RFP Response Components, Requirements, and Options

Instructions for Completion of Proposal

Responders are responsible for examining all conditions of participation and relevant service specifications and requirements in this Request for Proposals before submitting a Proposal.

Organization Contact Form

Please use this form to identify the Responder, to provide contact information and pertinent information about the people allowed to complete this Proposal, the contact person designated to work directly with Union County Senior Services in receiving referrals and the person designated to handle billing. In addition, confirm that you agree to comply with the attached

Conditions of Participation. All individuals involved in the administration of, and provision of services must be both aware of and in compliance with these specifications.

Statement of Organizational Purpose, List of Board Members (if applicable), Organization By-Laws (if applicable), and Table of Organization (if applicable)

Please describe your organization, its history and mission.

Disclosure of Ownership (if applicable)

List the names of all individuals and organizations having direct or indirect ownership interest of 5 percent or more in the Responder entity.

Certificate of Good Standing (if applicable)

If the Responder is a corporation or a limited liability company, please submit a copy of the current Certificate of Good Standing issued by the Secretary of the State of Ohio with the proposal.

Workers' Compensation Certificate (if applicable)

Please provide a copy of your agency's current Ohio Bureau of Workers' Compensation Certificate of Premium Payment with the proposal. If the Responder does not have an active Workers' Compensation account, please explain.

Documentation of Insurance Coverage (if applicable)

Please provide a certificate of insurance for the required liability coverage with the proposal. Updated certificates of insurance will be required during the contract term.

Before providing services, the successful Responder must provide both a certificate of insurance naming Union County as an additional insured as the insurance relates to the work done, service provided, and/or product delivered, and policy provision or endorsements as may be required for the services or products provided and documenting the County's additional insured status.

Non-Discrimination and Equal Employment Opportunity Statement

All Responders must complete and sign the attached non-discrimination and equal employment opportunity document.

Proposed 2026 budget using the budget template

All Responders must complete the budget template.

Internal Revenue Service (IRS) Determination Letter (if applicable)

Employer Identification Number

All Responders submit a W9 for processing payments through the Union County Auditor's Office.

Internal Revenue Service IRS Form 990 (if applicable)

Service/Program Description

1. What need, problem, or challenge experienced by seniors will your program address and how will your program meet the Senior sales tax levy's objective to support seniors to live safely and independently in their home?
2. What does your program propose to do to address the need, problem, or challenge stated in the previous question?
3. Describe the proposed service to be delivered by your agency and how the unit of service is defined. Include a geographical description of the area to be served. If you are applying for funding for more than one program, describe each program separately.
4. What are the goals or outcomes of your program(s)? For example, how do you quantify the service and track service outcomes?
5. How many seniors will be impacted by your program(s)?
6. Describe eligibility requirements of your program.

7. Describe how you plan to collaborate with other agencies. How will you process referrals from other agencies? Describe any working relationships you have with referral sources.

8. Describe how the Senior sales tax levy will be spent on your program. Include detail for all line items assigned to the "Senior Sales Tax Levy" on page 7.

Budget Worksheet

** Complete a separate sheet for each Program**

Program Name:

Agency Name:

Dates of Program Operation:

Agency Fiscal Year:

PROGRAM REVENUE (specific to the program for which you seek funding)

See page 2 for definitions

Proposed

Senior Sales Tax Levy

United Way Support

Government Support

Foundations/Private Grants

In-Kind Support

Program Fees

Client Contributions

Other Revenue

Interest/Investment Income

Total Program Revenue

\$0.00

PROGRAM EXPENSE (specific to the program for which you seek funding)

See page 2 for definitions

Proposed

**Senior Sales
Tax Levy**

Salaries (Program Staff)

Contract Labor

Benefits/Taxes (Program Staff)

Professional Fees

Supplies

Travel

Communication (phone, fax, email)

Occupancy/Utilities

Affiliate Payments

Major Property/Equipment

Acquisition/Rental & Maintenance

Conference/Training

Other (List)

Other (List)

Other (List)

Other (List)

Total Program Expenses

\$0.00

\$0.00

Budget Worksheet Definitions

- United Way Support – Funding received from United Way of Union County and other United Way funders.
- Government Support – Revenue from Federal, State, County, City, Village, or Township Government.
- Foundations/Private Grants – Funds received directly from private foundations and other grant sources.
- In-kind Support – gifts of materials or supplies in lieu of monetary donations that provide a savings for the program
- Program Fees – Fees received for services furnished by the organization
- Client Contributions – Donations received directly from individual donors
- Other Revenue – If you foresee having to use your agency's reserves in order to fund a portion of the program, list that amount here.
- Interest/Investment Income – Interest, dividends, and royalties on any type of investment.
- Salaries – Includes all salaries and wages, including full-time, part-time and temporary
- Contract Labor – Includes any temporary, professional labor that is specific to a portion of the program (i.e. payment to a financial counselor for financial literacy class to your clients).
- Benefits/Taxes (program staff) - Employee health and retirement benefits including premiums for insurance, life insurance, medical and hospital plans, disability insurance premiums, pension or retirement plans, supplemental payments to pensioned employees or payments to annuitants.
- Professional Fees – Fees and charges of professional practitioners, technical consultants, or semi-professional technicians who are not employees of the agency and are engaged as independent contractors for specified services on a fee or other individual contract basis. Does not include persons engaged for maintenance and repair services which should be included in "occupancy" expenses.
- Supplies – All supplies and materials used by an agency including office supplies, housekeeping supplies, cost of food and beverages purchased for use in agency food services or programs and recreational and craft supplies.
- Travel – Travel and transportation expenses of staff and volunteers including local fares; gas and oil, repairs, insurance, leasing, tires, licenses and permits for company vehicles; mileage reimbursement and appropriate actual expenses of agency staff and volunteers;

cost of lodging, meals and other expenses relative to travel and transportation of agency staff and volunteers.

- Communication (phone, fax, email) – Expenses for all and any communication.
- Occupancy/Utilities – Includes rent, building/equipment insurance, mortgage interest, electricity, gas, heating oil, water and sewer, janitorial and other maintenance services under contract, real estate and personal property taxes, licenses and permits (occupancy related only), and building and grounds maintenance supplies.
- Affiliate Payments – Amounts paid or payable to another organization – usually the national affiliate of the agency – to sustain aid, maintain, assist or support the program and support functions of that organization.
- Major Property/Equipment Acquisition/Rental & Maintenance – Rental and maintenance of equipment such as computers, calculators, copiers, fax machines, etc. or amounts paid to acquire above equipment.
- Conference/Training – Expenses of conducting meetings related to an agency's activities including registration/enrollment fees incurred by an employee while attending an outside meeting.
- Other – Expenses not reportable in another account classification. Miscellaneous expenses should be itemized.

Zip Codes Served in Union County

Broadway	43007
Irwin	43029
Magnetic Springs	43036
Marysville	43040
Milford Center	43045
Plain City	43064
Raymond	43067
Richwood	43344
Unionville Center	43077
West Mansfield	43358

Organization Contact Form

1) Responder's Name

Physical Address

Mailing Address

Area Code/ Phone

City State Zip

Email

2)Federal Tax ID Number:_____

3)Type of Agency: () Public () Private/Non-Profit () Private/For-Profit

4)Name and position of person authorized to sign proposal/contract for Responder

Name: _____ Position: _____

Mailing Address

Area Code/Phone

City State Zip

Email

5)Name and e-mail address of contact person who is designated to work directly with Union County Senior Services.

Name

Email

6)Name and e-mail address of fiscal/billing contact person.

Name

Email

I understand and agree to the Conditions of Participation in the Purchase of Service Proposal. I am authorized to commit the above organization to fulfill these conditions. Further, I have read, understand, agree to, and obligate the Responder to provide the service(s) described in the Service Specifications of those services for which we are submitting a quotation.

Signature

Title

Date

Non-Discrimination and Equal Opportunity Employment Unsworn Statement

(Made on penalty of perjury)

On behalf of _____, the Responder making this proposal, I affirm that Responder does not and will not discriminate against any employee or applicant for employment on the basis of race, disability, religion, color, sex, or national origin.

If awarded a contract under this proposal, Responder shall take affirmative action to make sure employees are treated during employment without regard to their race, disability, religion, color, sex, or national origin. If successful under the foregoing proposal, Responder shall post non-discrimination notices in conspicuous places available to employees and applicants for employment setting out the provisions of this Statement.

If awarded a contract under this proposal, Responder shall post non-discrimination notices in conspicuous places available to employees and applicants for employment setting forth the provisions of this Statement. Further, Responder does not and shall not discriminate on the basis of race, color, religion (creed), sex, age (except as permitted by law), national origin (ancestry), disability, marital status, military status, genetic information, gender identity, sexual orientation, low-income status, or limited English proficiency in providing its services.

I affirm that I have full authority to make this Statement and that I have the knowledge necessary to make these statement truthfully.

Responder Signature

Name: _____

Position: _____

Date: _____

Proposal Format

By 4:30 pm ET on September 14, 2026, all Responders must submit either:

- One (1) printed, paper copy of all proposal materials; or
- One (1) electronic file copy of all proposal materials in Portable Document Format (PDF) as an email attachment.

The proposal must be signed by individual(s) legally authorized to bind the Proposer(s) and must contain a statement that the proposal and the costs contained therein shall remain firm for a period of one hundred-eighty (180) days after September 14, 2026.

Proposal submittal address:

To the attention of Union County Senior Services at the address listed below with the subject line: Senior Sales Tax Levy Community Grants.

Union County Senior Services
940 London Avenue, Suite 1800
PO Box 389
Marysville OH 43040

OR

Email: union_accts_recv@jfs.ohio.gov

The submitted RFPs shall be clearly marked "Senior Sales Tax Levy Community Grants" on the front of the envelope or the top of the package that encloses the proposal documents.

Responders shall not contact any person who is an employee, officer, elected official or agent of Union County Senior Services, to discuss this RFP, except Union County Senior Service's Authorized Representative. Union County Senior Services may disqualify any Responder who makes such contact.

Responders may submit the proposals before the stated deadline. Failure to submit the required formats by this deadline may result in disqualification from the RFP process. Union County Senior Services shall bear no responsibility for the cost of preparing and submitting proposals by any Responder. No extensions shall be granted for responses to this RFP.

Evaluation Criteria and Scoring

Union County Senior Services will select a Responder which it determines to be capable of providing a high-quality product at a reasonable cost, in accordance with Section 307.86 of the Ohio Revised Code. The following is a partial list of criteria which will be used to evaluate proposals:

- Project aligns with Senior Sales Tax Levy objectives
- Similar project experience, personnel knowledge, and qualifications
- Compliance with RFP instructions and requirements
- Project costs
- Proposed project timeline

Union County Senior Services reserves the right to reject any proposal and all proposals, or to increase or decrease or omit any item or items, or to waive any informality in any proposal(s) as determined by Union County.

Terms, Conditions, Limitation, and Exceptions

A. This RFP does not obligate Union County Senior Services to issue an award or to pay any costs of preparing a proposal in response to this RFP.

B. The proposals will become part of Union County Senior Service's official files with no obligation on Union County Senior Service's part.

C. Union County Senior Services shall not be held accountable if material from proposals are obtained without the consent of the Responder by parties other than Union County Senior Services, at any time during the proposal evaluation process.

D. All proposals received and any or all-supporting documentation may be subject to disclosure pursuant to the Ohio Public Records Act and Ohio law generally. However, in accord with R.C. §307.862(C), proposals and related documents or records related to negotiations will not be available for inspection or copying until after the award of the grant. Union County Senior Services will use due diligence to protect materials conspicuously marked by any Responder as "proprietary," "trade secret" or "confidential". General technology approach or business model information does not constitute "proprietary," "trade secret" or confidential information. If Union County Senior Services receives a request for such documents or records, Union County Senior Services will notify the submitting Responder of such a request at least three (3) business days before producing any such record. The submitting Responder may, at its sole cost and expense, object to any such production of such records and to pursue any and all remedies available to it, whether in law or in equity, to protect its Intellectual Property interests in the records. If the submitting Responder does not take action to protect the requested records within five business days after notice from Union County Senior Services, Union County Senior Services will respond to the records request using its reasonable judgment.

E. Responder(s) shall offer no gratuities, favors, or anything of monetary value to any official or employee of Union County.

F. Responder(s) shall not collude in any manner, or engage in any practices, with any other Responder(s), which may restrict or eliminate competition or otherwise restrain trade. This is

not intended to preclude subcontracts and joint ventures for: (1) responding to this RFP, or (2) establishing a project team with the required experience and/or capability to provide the services specified. Conversely, Union County Senior Services can combine or consolidate proposals, or portions thereof, for the purposes mentioned.

G. All proposals submitted must be the original work product of the Responder. The copying or paraphrasing of the work product of another Responder is not permitted.

H. The RFP and the related responses of the selected Responder may by reference become part of any formal agreement between the selected Responder and Union County Senior Services. Union County Senior Services and the selected Responder may negotiate a grant for submission to Union County Senior Services for consideration and approval. If an agreement cannot be reached with the selected Responder, Union County Senior Services reserves the right to select an alternative Responder.

I. Union County Senior Services reserves the right to negotiate with alternative Responder(s) the exact terms and conditions of the grant.

J. Granting of exclusive negotiation rights does not commit Union County Senior Services to accept all or any term of the proposal(s). The final terms of any agreement will be agreed upon during negotiations. Negotiations may be terminated at any time by Union County Senior Services for failure to reach mutually acceptable terms.

K. Union County Senior Services reserves the right to request clarification of any proposal after all proposals have been received.

L. Union County Senior Services reserves the right to select elements from different individual proposals and to combine and consolidate them to best serve Union County Senior Services' interest. Union County Senior Services reserves the right to reduce the scope of the project and evaluate only the remaining elements from all proposals. Union County Senior Services reserves the right to reject specific elements in any proposal and to complete the evaluation process based only on the remaining items.

M. Any disputes arising out of this agreement that result in litigation shall be litigated in the appropriate court in Union County, Ohio.

N. This RFP, the responses thereto, and any awarded grant shall for all purposes be construed and enforced under the laws of the State of Ohio. All Responders shall comply with any applicable orders, rules, or regulations of Federal and State law in submitting a response to this RFP, and during the term and in performance of any grant awarded because of this RFP.

O. Entities submitting proposals must be able to enter into a legally binding agreement. All grant amount(s) resulting from this solicitation will be paid directly to the entity submitting accepted proposal(s). In any accepted proposal(s), to authorize payments directly to another

third party upon contracting the proposing entity may be required to fully execute such proper payment authorization forms as acceptable to Union County Senior Services.

P. Union County Senior Services reserves the right to conduct, for security reasons, a lawful background investigation on the selected Responders, its principal party, personnel, or subcontractors. Responders agree to cooperate with Union County Senior Services in this endeavor and to provide any permitted, reasonably necessary information. Union County Senior Services will, upon the Responder's written request, provide a copy of such background investigations to the Responders, to the extent allowable by law. Dependent upon the results of the background check, Union County Senior Services may request the Responders to immediately remove an individual from participation on this project. Responders shall not knowingly assign any personnel with records of criminal conviction(s) to this Project without advising Union County Senior Services of the nature and gravity of the offense. In fulfilling the obligations under this section, Union County Senior Services and the Responder shall comply with all laws, rules, and regulations relating to making investigative reports and disclosing the information. Union County Senior Services and the Responder shall, if allowed by law, indemnify, defend, and hold each other harmless against any wrongful disclosure by the indemnifying party, its employees, and/or agents of the reports and the information.

Q. All selected Responders shall be required during the project to cooperate fully, and in any reasonable manner Union County Senior Services shall request, with the Union County elected officials, officers, agents, employees, contractors, subcontractors, and volunteers. Further, selected Responders shall have to coordinate their implementation(s) with all other selected Responders and all other projects being undertaken by Union County. If any problem or difficulty should arise regarding such attempts at cooperation and coordination, Union County Senior Services shall be immediately informed and will determine how the parties are to proceed.

Conditions of Participation

1. All grants entered by Union County Senior Services represent an explicit agreement between all parties to work cooperatively with and supportive of one another toward the successful implementation of the goals of this grant.
2. Grantee commits to coordinate all related activities and services with Union County Senior Services and to support a community wide coordinated and integrated system of care.
3. Grantee agrees to provide quarterly financial and programmatic reports (reports must include numbers of seniors served by grant dollars) to Union County Senior Services on the following dates: April 30, July 31, October 31 & January 31 and in a format prescribed by Union County Senior Services. Grantee will include an invoice identifying the amount of money spent on each funded program. The invoice will specify the Quarter/Year for which the funds were spent, the organization name and address and the invoice amount.
4. Upon grant approval, grantees will be allocated funds on an annual basis. Grant funds are provided on a reimbursement basis in a timely manner following the submission and approval of the quarterly programmatic and financial reports.
5. Each Grantee will maintain all necessary records and information to complete financial and programmatic reports as required by Union County Senior Services. All financial and program performance records will be available for review by authorized representatives of Union County Senior Services. All programmatic and financial records must be retained by the grantee for a period of at least three years.
6. Grantee agrees to add the Union County Senior Sales Tax Project designated logo for levy funded programs to all stationary, brochures and advertisements related to the program supported by the grant throughout the duration of the funding period. The Grantee agrees to supply a copy of any publication related to the program supported by the grant to Union County Senior Services to be kept on file.
7. Union County Senior Services reserves the following rights and privileges:
 - A. To accept, reject or negotiate the modification of any application, proposal or budget submitted;
 - B. To require additional information regarding the participating organization including structure, finances, services or project proposed;
 - C. To increase, decrease, revise, or terminate any resulting grant including any of the following:
 - 1) Failure of grantee to comply with these Conditions of Participation;
 - 2) Failure of grantee to satisfactorily meet the goals of this proposal;

- 3) Failure of grantee to provide or obtain other funding as represented in the approved grant budget;
- 4) Failure of grantee to adequately address specific written concerns of Union County Senior Services in a timely manner;
- 5) Insufficient resources available to Union County Senior Services; or
- 6) Any other reasonable circumstance that impairs or prevents the performance of services as planned; or which fails to promote a coordinated and effective use of system resources.

8. Any changes in the information provided in the proposal will be provided in writing to Union County Senior Services within ten days of occurrence and be subject to negotiation regarding the continuation of the grant.

We have reviewed and accept the above Conditions of Participation, which will apply to our organization and service or project in the event we are selected as a grantee by Union County Senior Services.

Signature of Authorized Person

Date

Please print full name/Title