

TITLE

**2022 OLDER AMERICANS ACT
REQUEST FOR PROPOSALS
FOR
INDIAN RIVER, MARTIN,
PALM BEACH, OKEECHOBEE,
AND ST. LUCIE COUNTIES**

REQUESTOR

**AREA AGENCY ON AGING
OF PALM BEACH/TREASURE COAST, INC.**

DEADLINE

**JULY 22, 2021
3:00 PM**

NOTE: APPLICANTS THAT INTEND TO SUBMIT A PROPOSAL IN MORE THAN ONE DESIGNATED SERVICE AREA OR FOR MORE THAN ONE GROUPING OF SERVICES MUST DO SO IN SEPARATE APPLICATIONS. EACH OF THE APPLICATIONS MUST COMPLY WITH THE SUBMISSION PROCEDURES OUTLINED IN THIS RFP TEXT.

REQUEST FOR PROPOSALS

TABLE OF CONTENTS

ATTACHMENTS	4
ACRONYMS	5
SECTION I - STATEMENT OF NEED.....	6
SECTION II - STATEMENT OF PURPOSE	8
Eligibility	9
SECTION III - STATEMENT OF WORK.....	11
A. Introduction	11
B. Services to Be Provided	11
C. Guiding Principles	12
D. Specific Service Requirements	13
E. Estimated Funding by Designated Service Area.....	16
F. Computer Requirements	16
G. Reporting and Request for Payments	16
H. Services, Goals, Objectives and Performance Measures.....	18
I. Special Requirement for New Service Providers	19
J. Services Exempt From This RFP.....	19
SECTION IV - GENERAL INFORMATION.....	20
A. Contact Person.....	20
B. Inquiries/Cone of Silence.....	20
C. Proposal Deadlines and RFP Timeline.....	21
D. Funding.....	22
E. Method of Cost Presentation	24
F. Method of Payment	25
G. Proprietary and Confidential Information	25
H. Acceptance of Proposals	26
I. Withdrawal of Proposals.....	27
J. Notice of Contract Award.....	27
K. Emergency Contracts	27
L. Nonexpendable Property.....	28
M. Appeal Procedures	28
SECTION V - CONTRACT TERMS AND CONDITIONS.....	29
SECTION VI - INSTRUCTIONS FOR DEVELOPING PROPOSALS.....	30

SECTION VII - INSTRUCTIONS FOR THE SEPARATE PACKAGE.....	31
A. Service History	31
B. Service Delivery	31
C. Program Narrative.....	34
D. Information Collection and Analysis	38
E. Grievance and Complaint Procedures for Consumer Complaints	38
F. Disaster/Emergency	38
G. Unusual Incidents	39
H. Special Licensure Assurance	39
I. Automated Client Reporting Requirement and Internal Reconciliation Process	40
J. Abuse, Neglect and Exploitation Reporting.....	40
K. Personnel.....	40
L. Corporate Annual Report Status.....	42
M. Employee/Board Rosters	42
N. Subcontract Agencies	43
O. Programs to Ensure Access for Limited English Proficiency Consumers	43
P. Quality Improvement	43
Q. Quality Assurance Plan.....	44
R. Exhibits:	44
SECTION VIII - PROPOSAL EVALUATION.....	45

ATTACHMENTS

- I. Standard Agreement
- II. Notice of Intent to Submit a Proposal
- III. Service Provider Application and Spreadsheets
- IV. Template for Provider Quality Improvement Plan 2022
- V. AAAPB/TC Quality Improvement Plan
- VI. Form I
- VII. Form II

ACRONYMS

AAAPB/TC	Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
ADL	Activity of Daily Living
APS	Adult Protective Services
CIRTS	Client Information Registration and Tracking System
DCF	Department of Children and Families
DOEA	Department of Elder Affairs
ECIRTS	Enterprise Client Information Registration and Tracking System
FAC	Florida Administrative Code
FS	Florida Statute
OAA	Older Americans Act
PSA	Planning & Service Area
RFP	Request For Proposal
SHINE	Serving Health Insurance Needs of the Elderly
SPA	Service Provider Application
SSI	Supplemental Security Income
USC	United States Code

SECTION I - STATEMENT OF NEED

The federal Older Americans Act of 1965 (OAA), as amended, has as its key purpose the creation of comprehensive service infrastructures that respond effectively to the needs of the 60+ population.

The major goals of the OAA program are to improve the quality of life for older individuals, preserve their independence and prevent or delay more costly institutional care. These goals are achieved through the implementation of a comprehensive and coordinated service system that provides a continuum of service alternatives that meet the diverse needs of elders and their caregivers.

The OAA Program is a federal program initiative that provides assistance to older persons and caregivers and is the only federal supportive services program directed solely toward improving the lives of older people. The program provides a framework for a partnership among the different levels of government and the public and private sectors with a common objective, improving the quality of life for all older individuals by helping them to remain independent and productive. The primary purpose of the OAA program is to foster the development and implementation of comprehensive and coordinated systems to serve older individuals. The OAA program uses these systems to assist older individuals to attain and maintain maximum independence and dignity in a home environment and allows for the capability of self-care with appropriate supportive services.

OAA funds are appropriated annually by Congress and subsequently awarded to the individual States. The State agency on aging designates planning and service areas (PSAs) in the State and makes a subcontract or contract under an approved area plan to one area agency on aging in each PSA for the purpose of building comprehensive systems for older people throughout the State. Area agencies on aging in turn make subgrants or subcontracts to service providers to perform certain specified functions.

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. (AAAPB/TC) has been designated by the State of Florida Department of Elder Affairs ("DOEA" or the "Department") as the area agency on aging for Planning and Service Area 9 (PSA 9) which encompasses all of Indian River, Martin, Palm Beach, St. Lucie and Okeechobee counties. DOEA contracts with the AAAPB/TC for the purpose of building a comprehensive system of care for older adults in PSA 9.

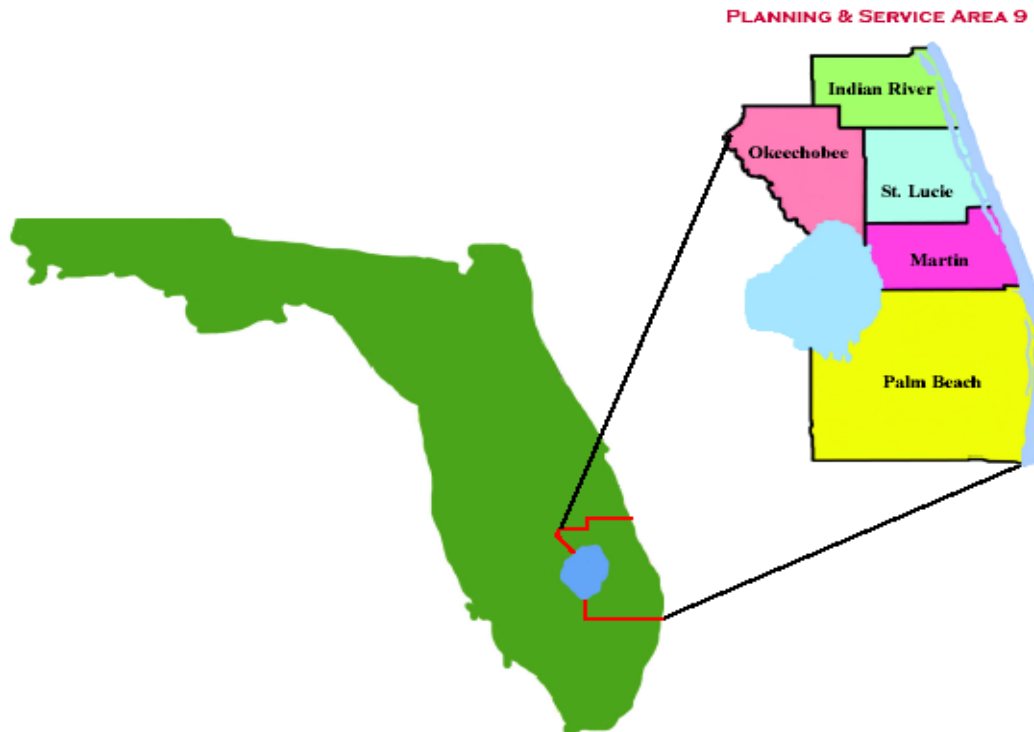
In 2012 the Department of Elder Affairs expanded the designation of the AAAPB/TC to an Aging and Disability Resource Center. This designation reflects the expansion of information and referral services to adults with disabilities. In coordination with this designation the Board of Directors revised the Center's mission statement to:

Our MISSION

is to promote, support and advocate for the independence, dignity and wellbeing of seniors, adults with disabilities, and those who care for them in a manner that values diversity, reflects the communities we serve and embraces the collaboration of the aging network.

A map depicting PSA 9 in relation to the state of Florida is below:

**PLANNING & SERVICE AREA 9
IN RELATION TO STATE OF FLORIDA**



Profiles for each of the counties in our Planning and Service Area are at:

<https://www.aaapbtc.org/public-documents>

SECTION II - STATEMENT OF PURPOSE

The purpose of this RFP is to solicit applications from qualified public or private agencies and organizations interested in providing services to the 60+ population of Palm Beach, Martin, St. Lucie, Indian River and Okeechobee counties through funds from the OAA program. All OAA services must be client centered and delivered with the goal of providing elder consumers the support and assistance needed so that they may remain in the community, leading independent lives in the least restrictive environment. Small businesses, minority owned businesses and women owned businesses are encouraged to respond to the RFP.

Any proposed contract between the AAAPB/TC and a profit making agency or organization to provide services being procured through this RFP must receive approval from DOEA prior to execution of the contract and may not receive any advanced funding for contractual services.

All awards are subject to the availability of funds and area plan approval by DOEA. Projections of available resources are used to allocate financial awards. If the actual amount of funding made available to the AAAPB/TC is less than originally projected, a reconsideration of awards will be made with the likelihood of reductions or cancellations of awards being made in the AAAPB/TC's sole discretion. The AAAPB/TC reserves the right to amend any contracts arising out of this RFP at any time during their terms, including any renewal periods, to make such contracts consistent with the approved area plan as well as with any changes to state or federal law.

Any contract to be awarded through this RFP will be a one-year agreement for the period January 1, 2022 – December 31, 2022 with funding allocated on an annual basis and renewed on an annual basis. The contract may be renewed for five (5) consecutive years beyond the initial contract period. Renewals shall be upon mutual agreement of the parties, contingent upon the availability of funds and satisfactory performance evaluations as determined by the AAAPB/TC. To maximize the use of funds and increase the availability of services, the AAAPB/TC reserves the right to amend funding awards, in accordance with its own surplus/deficit policies, when awarded agencies are experiencing an actual or projected surplus in funding in any particular contract year.

The AAAPB/TC reserves the right to modify the terms of the Sample OAA Standard Agreement provided as an attachment to this RFP to conform with performance measurement requirements that may be implemented by DOEA and to make such Sample OAA Standard Agreement consistent with the contract to be entered into by the AAAPB/TC and DOEA pursuant to which the AAAPB/TC will administer funding awarded pursuant to this RFP.

Notwithstanding the foregoing or anything to the contrary in any contract between a service provider and the AAAPB/TC, the terms of any contract awarded by the AAAPB/TC pursuant to this RFP shall end immediately upon expiration or termination of the AAAPB/TC's contract with the DOEA or any successor State area agency on aging for services under the Older Americans Act Program, or to the extent the AAAPB/TC no longer receives funding under the Older Americans Act.

The following are the principles guiding this RFP:

1. The RFP ensures that quality services are provided by requiring that providers and the services they deliver meet the criteria and guidelines contained in the current Florida Department of Elder Affairs' Programs and Services Handbook. Only applicants meeting

these standards of quality and service delivery will be given consideration for contract awards.

2. The services to be procured through this RFP are based on a comprehensive needs assessment, in conjunction with consideration of external funding stream limitations of purpose, scope and dollar amount.
3. The RFP and concomitant allocation of funding is primarily driven by considerations of consumer needs for services.
4. The RFP is intended to help the maximum number of consumers served with the most appropriate services by giving preference to bidders that meet the required standards of service that are able to offer the best quality services at the lowest possible cost.
5. The RFP assures the viability of a competitive and dependable service delivery system.

Eligibility

A. Title III-B Supportive Services - Recipients must be 60 years of age or older.

B. General Nutrition Services - General factors that should be considered in establishing priority for Nutrition Services, both C-1 and C-2, include those older persons who meet the following:

- 1) Cannot afford to eat adequately;
- 2) Lack the skills or knowledge to select and prepare nourishing and well-balanced meals;
- 3) Have limited mobility which may impair their capacity to shop and cook for themselves; or
- 4) Have a disabling illness or physical condition requiring nutritional support;
- 5) Have been screened at a high nutritional risk.

C. Title III-C-1 – Congregate Nutrition Services - In addition to meeting the general nutrition services eligibility requirements listed above, individuals must be mobile, not homebound and physically, mentally and medically able to attend a congregate nutrition program. Individuals eligible to receive congregate meals include the following:

- 1) Individuals age 60 or older; and
- 2) Any spouse (regardless of age) who attends the dining center with his/her eligible spouse;
- 3) Persons with a disability, regardless of age, who reside in a housing facility occupied primarily by older individuals where congregate nutrition services are provided;
- 4) Disabled persons who reside at home with and accompany an eligible person to the dining center; and
- 5) Volunteers, regardless of age, who provide essential services on a regular basis during meal hours.

D. Title III-C-2 – Home Delivered Nutrition Services - In addition to meeting the general nutrition services eligibility requirements listed above, individuals must be homebound and physically, mentally or medically unable to attend a congregate nutrition program. Individuals eligible to receive home delivered meals include the following:

- 1) Individuals age 60 or older who are homebound by reason of illness, disability or isolation;
- 2) The spouse of a homebound eligible individual, regardless of age, if the provision of the collateral meal supports maintaining the person at home;
- 3) Individuals with disabilities, regardless of age, who reside at home with eligible individuals and are dependent on them for care;
- 4) Persons at nutritional risk who have physical, emotional or behavioral conditions, which would make their presence at the congregate site inappropriate; and
- 5) Persons at nutritional risk who are socially or otherwise isolated and unable to attend a congregate nutrition site.

E. Title III-D - Disease Prevention and Health Promotion Services -Service recipients must be 60 years of age or older. Priority will be given to persons residing in medically underserved areas.

F. Title III-E - Caregiver Support Services – Service recipients must be

- 1) Family caregivers of individuals age 60 or older; or
- 2) Grandparents (age 55 or older) or older individuals (age 55 or older) who are relative caregivers;
- 3) Priority will be given to family caregivers who provide care for individuals with Alzheimer’s disease and related disorders with neurological and organic brain dysfunction and for grandparents or older individuals who are relative caregivers who provide care for children with severe disabilities; and
- 4) For respite and supplemental services, a family caregiver must be providing care for an older individual who meets the definition of the term “frail” in Section 102 Paragraph 22 of the Older Americans Act of 1965 as amended, March 2020.

The Older Americans Act mandates that preference shall be given to those with the greatest economic and social need, with particular attention to low- income older individuals, including those that are low-income minorities, have limited English proficiency, and older individuals residing in rural areas.

Responses to this RFP must address these multiple types of culturally diverse consumers and their caregivers in the delivery of service while fully recognizing that government funds cannot meet all of the demands for service. Service delivery must address ethnic and cultural needs as well as the ability to serve disabled, illiterate, and non-English speaking populations.

G. Nutrition Services Incentive Program

Consistent with existing requirements of the NSIP, the Provider may use NSIP funding to purchase foods of U.S. origin for their nutrition projects under Title III of the OAA. NSIP funds must be used to expand meal services to older adults.

Meals served to an elderly individual, funded in whole or in part under Statewide Medicaid Managed Care Long-Term Care, Home Care for the Elderly, Community Care for the Elderly Programs, or other means tested programs may not be included in the NSIP count. OAA-funded congregate meals provided to SMMC LTC clients may be included in the NSIP count.

SECTION III - STATEMENT OF WORK

A. Introduction

Services will be bid by designated service areas. All awards will be based upon serving the best interests of seniors and caregivers in the PSA and ensuring consumer choice. Definitions and standards of services are given in the current DOEA Programs and Services Manual. A link for viewing and/or downloading this manual is available at the AAAPB/TC website:

<https://www.aaapbtc.org/public-documents>

B. Services to Be Provided

Allowable services to be provided are listed in the following table. The service definition, unit definition, training requirements, delivery standards and special conditions for allowable services are listed in Appendix A of the current DOEA Programs and Services Manual. All potential providers should reference the current DOEA Programs and Services Manual to understand the detailed service descriptions and ensure that they will be able to conform to the delivery standards and special conditions.

GROUPING OF SERVICES

GROUP ONE SERVICES/PSA-WIDE	
TITLE III-B Emergency Alert Response	
GROUP TWO SERVICES/DESIGNATED SERVICE AREAS	
TITLE III-B Adult Day Care Adult Day Health Care Caregiver Training/Support Case Aide Case Management Chore Chore (Enhanced) Companionship Counseling (Gerontological) Counseling (Mental Health/Screening) Education/Training Escort Home Health Aide Service Homemaker Housing Improvement Interpreter/Translating Material Aide Outreach Personal Care Respite In-Home Respite Facility Based Screening/Assessment Specialized Medical Equipment, Services and Supplies Telephone Reassurance	TITLE III-E NATIONAL CAREGIVER SUPPORT PROGRAM Adult Day Care Adult Day Health Care Caregiver Training/Support Counseling (Gerontological) Counseling (Mental Health/Screening) Education/Training Financial Risk Reduction (Assessment) Financial Risk Reduction (Maintenance) Outreach Powerful Tools for Caregivers Respite In-Home Respite (Facility-Based) Screening/Assessment

TITLE III-C-1 Congregate Meals* Nutrition Counseling Nutrition Education* Outreach* Congregate Meals (Screening)*	TITLE III-C-2 Home Delivered Meals* Nutrition Counseling* Nutrition Education* Outreach* Screening/Assessment
TITLE III-ES CAREGIVER SUPPLEMENTAL SERVICES Chore Chore (Enhanced) Housing Improvement Legal Assistance Material Aid Specialized Medical Equipment, Services and Supplies	TITLE III-D A Matter of Balance (MOB) and Un Asunto de Equilibrio Arthritis Foundation Tai Chi Program (Tai Chi for Arthritis) Chronic Disease Self-Management Diabetes Self-Management Program and Program de Manejo Personal de la Diabetes Enhance Fitness (EF) Powerful Tools for Caregivers Tai Ji/Tai Chi Quan: Moving for Better Balance Tomando Control de su Salud Walk with Ease
GROUP THREE SERVICES/DESIGNATED SERVICE AREAS	
TITLE III-B Legal Assistance	
GROUP FOUR SERVICES/DESIGNATED SERVICE AREAS	
TITLE III-EG Legal Assistance	
GROUP FIVE SERVICES/DESIGNATED SERVICE AREAS	
TITLE III-EG Caregiver Training/Support Child Day Care Counseling (Gerontological) Counseling (Mental Health Screening) Education/Training Outreach Screening/Assessment Sitter Transportation	
<p>*If bidding on Title III-C, these services must be provided <i>The AAAPB/TC will award contracts for Screening and Assessment service to all funded providers selected to provide services that require screening and/or assessment under this Title.</i></p>	

C. Guiding Principles

- 1) Grouping of services is done to ensure the continuity and coordination among services with similar client needs and administrative tasks to ensure maximum flexibility and utilization of federal funds, reduce fragmentation of services, and enhance client access. The AAAPB/TC is committed to developing a comprehensive, coordinated service delivery system that is responsive to client needs.

- 2) Recipients of OAA Title III funds must coordinate service activities with the activities of other community agencies, voluntary organizations, and government agencies providing support services. Where feasible, interagency agreements should be developed.
- 3) OAA Title III funds must be spent in addition to, and must not supplant any Federal, State, or local funds expended for services. Recipients of OAA Title III funds must ensure that Veteran's Benefits, Medicare/Medicaid Benefits, and local benefit/aid programs are accessed before the use of OAA funds.
- 4) OAA Title III funds must support and not supplant caregiver and family efforts, fostering consumer choice and efficiency in service dollars.

D. Specific Service Requirements

- 1) All bidders are required to adhere to all rules, regulations and service standards contained in the current DOEA Programs and Services Manual as related to the services.
- 2) Bidders must serve the entire designated service area for which they are applying.
- 3) The AAAPB/TC will not fund multiple providers for the same service type in the same designated service area. However within a designated service area, multiple contracts may be awarded under the same service description if service type is different in terms of service delivery, service content, and/or service targeting. For instance, Counseling with content specifically geared to victims of crime may be awarded within a designated service area along with counseling which is more general in nature. Similarly, Education/Training presented in a format culturally and linguistically appropriate to Hispanic caregivers may be funded in the same designated service area as Education/Training presented in an entirely English format.
- 4) Bidders can bid on single OR multiple groups of services in one or more designated service areas.
- 5) A bidder can bid on one or more of the following groups:
 - To bid on Group I, a bidder must be able to provide Emergency Alert Response for the entire five-county Planning and Service Area (PSA).
 - To bid on Group II an applicant can bid on one or more services and/or one or more designated service areas. The applicant must be able to provide services for the entire service area.
 - To bid on Group III an applicant must be able to provide Legal Assistance and can bid on one or more designated service areas. The applicant must be able to provide services for the entire designated service area.
 - To bid on Group IV an applicant must be able to provide Legal Assistance to the special caregiver populations of grandparents and older individuals who are relative caregivers. The applicant can bid on one or more designated service areas. The applicant must be able to provide services for the entire designated service area.
 - To bid on Group V an applicant must be able to provide any one or more Title III-EG services other than Legal Assistance to the special caregiver populations of grandparents and older individuals who are relative caregivers. The applicant can bid on one or more designated service areas.

NOTE: APPLICANTS THAT INTEND TO SUBMIT A PROPOSAL IN MORE THAN ONE DESIGNATED SERVICE AREA OR FOR MORE THAN ONE GROUPING OF SERVICES MUST DO SO IN SEPARATE APPLICATIONS. EACH OF THE APPLICATIONS MUST COMPLY WITH THE SUBMISSION PROCEDURES OUTLINED IN THIS RFP TEXT.

6) The PSA 9 designated service areas are:

Entire Planning and Service Area	Indian River, Martin, Okeechobee, Palm Beach and St. Lucie Counties																																												
Indian River County Service Area	Indian River County																																												
Martin County Service Area	Martin County																																												
Okeechobee Service Area	Okeechobee County																																												
Palm Beach County Service Area A	<p>Martin County line to Hypoluxo Road; coastline to Lake Okeechobee/Hendry County Line.</p> <p>Zip Codes:</p> <table border="1"> <tr><td>33401</td><td>33402</td><td>33403</td><td>33404</td></tr> <tr><td>33405</td><td>33406</td><td>33407</td><td>33408</td></tr> <tr><td>33409</td><td>33410</td><td>33411</td><td>33412</td></tr> <tr><td>33413</td><td>33414</td><td>33415</td><td>33416</td></tr> <tr><td>33417</td><td>33418</td><td>33419</td><td>33420</td></tr> <tr><td>33421</td><td>33422</td><td>33430</td><td>33438</td></tr> <tr><td>33440</td><td>33449</td><td>33454</td><td>33458</td></tr> <tr><td>33459</td><td>33460</td><td>33461</td><td>33462</td></tr> <tr><td>33463</td><td>33465</td><td>33466</td><td>33467</td></tr> <tr><td>33468</td><td>33469</td><td>33470</td><td>33476</td></tr> <tr><td>33477</td><td>33478</td><td>33480</td><td>33493</td></tr> </table>	33401	33402	33403	33404	33405	33406	33407	33408	33409	33410	33411	33412	33413	33414	33415	33416	33417	33418	33419	33420	33421	33422	33430	33438	33440	33449	33454	33458	33459	33460	33461	33462	33463	33465	33466	33467	33468	33469	33470	33476	33477	33478	33480	33493
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Palm Beach County Service Area B	Hypoluxo Road to Broward County line; coastline to Hendry County Zip Codes: <table border="1" data-bbox="894 310 1334 852"> <tr><td>33067</td><td>33424</td><td>33425</td><td>33426</td></tr> <tr><td>33427</td><td>33428</td><td>33429</td><td>33431</td></tr> <tr><td>33432</td><td>33433</td><td>33434</td><td>33435</td></tr> <tr><td>33436</td><td>33437</td><td>33444</td><td>33445</td></tr> <tr><td>33446</td><td>33448</td><td>33464</td><td>33472</td></tr> <tr><td>33473</td><td>33474</td><td>33481</td><td>33482</td></tr> <tr><td>33483</td><td>33484</td><td>33486</td><td>33487</td></tr> <tr><td>33488</td><td>33496</td><td>33497</td><td>33498</td></tr> <tr><td>33499</td><td></td><td></td><td></td></tr> </table>				33067	33424	33425	33426	33427	33428	33429	33431	33432	33433	33434	33435	33436	33437	33444	33445	33446	33448	33464	33472	33473	33474	33481	33482	33483	33484	33486	33487	33488	33496	33497	33498	33499			
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- 7) Prospective bidders electing to bid on multiple designated service areas and/or multiple service groups must complete a Service Provider Application and Separate Package for each designated service area and each grouping of services within that designated service area based on the amount of funds allocated.
- 8) All bidders bidding on meals are to use the Nutrition Services Incentive Program (NSIP) meal rate, currently \$0.72, in determining the number of units and unit cost.
- 9) The AAAPB/TC reserves the right to negotiate administrative costs of any successful bidder(s) whose costs being charged to the grant are considered excessive.
- 10) If a bid is not received for any single or multiple groups within a designated service area, the AAAPB/TC is not bound to the RFP process and may proceed to enter into negotiations with any other entities suitable and deemed to be in the best interest of clients.
- 11) All service dollars are to remain in the designated service area unless a suitable provider is not available.
- 12) If deemed to be in the best interest of the clients, the AAAPB/TC reserves the right to require the successful bidder to provide additional services. In the event these additional services cannot be supplied by the provider selected or if the cost is not considered competitive, the AAAPB/TC will not be obligated to use the RFP process to obtain those services elsewhere, and will negotiate with any entity deemed suitable. The AAAPB/TC reserves the right to allow additional services, subsequent to the RFP, as defined in the current DOEA Programs and Services Manual based on documented need in the service area.
- 13) Medicare and Medicaid are to pay for approved Medicare/Medicaid services before OAA funds are utilized
- 14) OAA Title III requirements related to targeting and conducting participant satisfaction surveys apply to these funds.
- 15) Existing requirements documented in the current DOEA Programs and Services Manual, Chapter 1, Section 3 Monitoring, apply to these funds.

- 16) Existing requirements for Programs and Services are documented in the current DOEA Programs and Services Manual: Common Issues for Programs/Services apply to these funds. These are listed in Appendix A Section 1.C. of the current DOEA Programs and Services Manual.
- 17) Regarding respite care and supplemental services listed under Title IIIES, the older individual (age 60+) being provided care by the family caregiver (defined in Chapter 3 Section III) must meet the conditions, with respect to frailty, specified in the current DOEA Programs and Services Manual. That is to say that the older individual is determined to be functionally impaired because the individual:
- a) Is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision; or
 - b) Due to cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

E. Estimated Funding by Designated Service Area

Designated services and dollars available (based on estimates at the time of the RFP and subject to the availability of funds) are noted below and are representative of established program priorities.

**OLDER AMERICANS ACT
ESTIMATED FUNDING FOR CALENDAR YEAR 2022
BY DESIGNATED SERVICE AREA**

Designated Service Area	Group One		Group Two				Group Three (Legal Services)	Group Four (Legal Services)	Group Five (Grandparent Support Services)
	Title III-B	Title III-B	Title III-C-1	Title III-C-2	Title III-D	Titles III-E and III-ES	Title III-B	Title III-EG	Title III-EG
PSA-Wide	48,060								
Martin		160,410	229,150	154,670	13,800	41,920	25,760	1,500	2,000
St. Lucie		222,690	184,610	341,600	19,400	92,820	25,060	1,500	2,000
Indian River		161,460	133,520	244,010	5,800	66,020	42,450	3,000	2,000
Okeechobee		46,240	30,020	80,100	10,700	21,190	8,910	1,000	1,000
Palm Beach A		899,760	581,050	562,600	37,700	247,325	120,380	8,000	13,500
Palm Beach B		268,500	323,760	641,050	37,700	235,940	60,190	8,000	13,500
Total	48,060	1,759,060	1,482,110	2,024,030	125,100	705,215	282,750	23,000	34,000

F. Computer Requirements

The successful bidder must have or obtain (within two weeks of being selected) the following:

- 1) Broadband Internet Access (wireless or dialup internet is not permitted)
- 2) Microsoft Office Professional
- 3) Internet connection used to access the E-CIRTS system for data entry and reporting.
- 4) Email capabilities that will allow for large attachments.
- 5) Phone system that will handle several simultaneous calls
- 6) At least one personal computer and printer for data entry and printing reports.

G. Reporting and Request for Payments

- 1) The Enterprise Client Information Registration and Tracking System (E-CIRTS) is used by the Florida Aging Network as the database for consumer, program, and service

information for DOEA. The data entry requirements for E-CIRTS are based upon federally mandated data and data required by the Florida Legislature for state General Revenue funded programs.

- 2) All providers will be required to input client data into the E-CIRTS database system. E-CIRTS is accessed through the DOEA state networking system. The AAAPB/TC will provide technical assistance to the successful bidder in this process.
- 3) Failure to meet E-CIRTS reporting requirements, including, but not limited to, overdue assessments, will result in sanctions and other enforcement actions as contemplated in the CIRTS Reports Section (II.E.2.a) of the Standard Agreement (Attachment I).
- 4) Client data stored electronically in service providers' systems is required to be stored securely and backed up daily to ensure data is available for data entry into E-CIRTS.
- 5) Client data stored in paper form is required to be stored securely and be accessible for data entry into E-CIRTS.
- 6) The service provider must provide fiscal information and make payment requests in accordance with requirements of DOEA and the AAAPB/TC. Consumer and program information must be entered in the Department's E-CIRTS database as required for the OAA program. Reporting must be within the timeframe established by the AAAPB/TC. The service provider is also responsible for the accurate timely input of data into E-CIRTS by any sub-contractor.
- 7) Extensions to the reporting deadlines may be granted on an exception basis, if a prior written request is received and approved by the AAAPB/TC's Chief Financial Officer.
- 8) Failure to meet the reporting deadline without written approval as explained above will result in a delay of payment, as late submittal of requests for payment are processed and paid in the subsequent month. A request for payment may also be delayed if proper documentation is not included as required by DOEA guidelines.
- 9) Data input requirements are referenced in Appendix C of the current DOEA Programs and Services Manual. Bidders are strongly encouraged to read the current DOEA Programs and Services Manual for further information regarding these operational and compliance issues.
- 10) Payment requests exceeding ninety (90) days after the month in which the service(s) were provided may not be honored and may be considered forfeited. This requirement is also applicable to all sub-contractor(s) of the service provider. The service provider has the responsibility to ensure that all requests for payment and corresponding units of services are reported in E-CIRTS within the required time period.
- 11) Service providers will be required to send a minimum of one Information Systems Staff Member and one Program Staff Member to the scheduled E-CIRTS User Group Meetings and additional training as necessary as the E-CIRTS system is updated. Exceptions must be approved by the AAAPB/TC.
- 12) The service provider shall respond to all inquiries related to program surplus/deficit analyses and reports, program spend-out plans and other requests for programmatic and/or financial data within the timeframe requested by the AAAPB/TC.
- 13) Unit costs for services, developed by all service providers using the Unit Costing Methodology as described in the instructions, will be recorded in E-CIRTS. These costs and the number of service units reported will be used to validate provider's request for payment. The AAAPB/TC's payment to any agency will be based on timely and accurate reporting of required consumer and service data in E-CIRTS. The AAAPB/TC will not approve or pay any invoice that is not supported by E-CIRTS documentation. Failure to ensure the collection and maintenance of E-CIRTS data may result in non-payment or suspension of contract.

H. Services, Goals, Objectives and Performance Measures

In keeping with the legislatively mandated requirements for contract performance measures, the DOEA has identified five key objectives used to develop implementation strategies to assist DOEA in achieving statewide outcome and output measures identified for the aging network. The goal and related objectives are:

GOAL: Enable individuals to maintain a high quality of life for as long as possible through the provision of home and community-based services, including supports for family caregivers

OBJECTIVE 1: Identify and serve target populations in need of home and community-based services

OBJECTIVE 2: Ensure efforts are in place to fulfill unmet needs and serve as many clients as possible

OBJECTIVE 3: Provide high quality services

OBJECTIVE 4: Provide services, education, and referrals to meet specific needs of individuals with dementia

OBJECTIVE 5: Improve caregiver supports

The designated lead agency is required to meet and / or exceed the bolded outcome / output measures below as specified by the Department of Elder Affairs and Area Agency on Aging of Palm Beach/Treasure Coast, Inc. The designated lead agency must include strategies to address all of the objectives listed.

The outcome/output measures are:

- Percent of most frail elders who remain at home or in the community instead of going into a nursing home
- **Percent of new service recipients whose ADL assessment score has been maintained or improved**
- **Percent of new service recipients whose IADL assessment score has been maintained or improved**
- Percent of customers who are at imminent risk of nursing home placement who are served with community-based services
- Percent of family and family-assisted caregivers who self-report they are very likely to provide care
- Percent of caregivers whose ability to provide care is maintained or improved after one year of service intervention (as determined by the caregiver and the assessor)
- **Percent of elders with high or moderate risk environments who improved their environment score**
- **Percent of Adult Protective Services (APS) referrals who are in need of immediate services to prevent further harm who are served within 72 hours**

I. Special Requirement for New Service Providers

In the event an applicant is selected who has not previously provided OAA services, a transition plan for service delivery and computer automation and a plan of reassessment of current consumers (if applicable) must be submitted within two weeks (10 working days) of notification of award.

Staff training plans, start-up activities and all other operational, programmatic or fiscal tasks must be identified with accompanying time frames, if not already identified in the applicant's proposal. If the transition involves the transfer of consumer files, the transition plans must address access to current consumer files, notification process to existing consumers, and proposed plans to notify consumers whose service(s) will be terminated or reduced in compliance with DOEA's appeals procedure.

J. Services Exempt From This RFP

Title III-B transportation services are not a part of the Older Americans Act RFP. In compliance with Chapter 427 F.S., the AAAPB/TC provides funds for transportation directly to the designated Community Transportation Coordinator (CTC) or as specified in the approved Memorandum of Agreement. If the successful bidder is also the designated CTC, all transportation funds will be incorporated into the OAA contract.

SECTION IV - GENERAL INFORMATION

A. Contact Person

The contact person for this RFP and the address for the submission of questions regarding this RFP, a proposal, the withdrawal of a proposal, or any other submission relating to this RFP is:

Nancy Yarnall, Director of Consumer Care and Planning
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
4400 North Congress Avenue
West Palm Beach, Florida 33407
PHONE: 561-684-5885 ext. 59215
FAX: 561-214-8620
EMAIL: nyarnall@YourADRC.org

B. Inquiries/Cone of Silence

Verbal inquiries or other verbal questions relating to the RFP will not be accepted.

All questions must be submitted in writing only and must be submitted by the deadline in the RFP Timeline. A complete copy of all questions submitted by prospective applicants and the AAAPB/TC's responses will be provided by an addendum to this RFP within the time frame specified in the RFP Timeline.

Written questions may be e-mailed to the contact person in charge of this solicitation process. **The Area Agency on Aging of Palm Beach/Treasure Coast may at times experience technical difficulties receiving e-mail correspondence that includes attachments. For this reason, we require all bidders to call the contact person to confirm that your questions have been received by the Area Agency on Aging of Palm Beach/Treasure Coast. Further, the Area Agency on Aging of Palm Beach/Treasure Coast does not take responsibility for any lost or misplaced documents or any questions that have not been received by the Area Agency on Aging of Palm Beach/Treasure Coast within the established deadline.**

Cone of Silence: Respondents to this RFP, or persons acting on their behalf, may not contact, between the release of this RFP and deadline for submission of written appeals, any employee or officer of the Area Agency on Aging, any individual involved in evaluating proposals submitted in response to the RFP, or any employee or officer of the State of Florida concerning any aspect of this solicitation, except in writing to the contact person identified below. Violation of this provision may be grounds for rejecting a proposal.

Written inquiries will be accepted from May 26, 2021 at 4:00 PM until June 17, 2021 at 4:00 PM. No written inquiries will be accepted after 4:01 PM June 17, 2021. Written inquiries may be emailed to the contact person in charge of this solicitation process:

Nancy Yarnall
nyarnall@youradrc.org
Phone: 561-684-5885 ext. 59215
Area Agency on Aging of Palm Beach
4400 North Congress Avenue
West Palm Beach, FL 33407

C. Proposal Deadlines and RFP Timeline

The following schedule will be adhered to in all actions relative to this procurement.

	ACTIVITIES	DATE/ DEADLINE	TIME
1.	Request for Proposal posted on the AAAPB/TC Inc. website and available for download.	5/26/2021	4:00 PM
2.	Notice of Intent to submit proposal due (optional)	6/15/2021	4:00 PM
3.	Last day for written inquiries to be received by the AAAPB/TC, Inc.	6/17/2021	4:00 PM
4.	Response to written inquiries and RFP addenda will be posted on the AAAPB/TC official website at https://www.aaapbtc.org/public-notice	7/02/2021	4:00 PM
5.	Last day for proposal submission at: Area Agency on Aging of Palm Beach/Treasure Coast, Inc. 4400 North Congress Avenue West Palm Beach, FL 33407	7/22/2021	3:00 PM
6.	Public Opening of Proposals held at AAAPB/TC offices. Bid documents are exempt from public inspection or discussion at that time.	7/22/2021	3:15 PM
7.	Meeting with Review Panels to discuss evaluation process and proposal distribution (Public Meeting)	7/26/2021	2:00 PM – 4:00 PM
8.	Review Panel Score Sheets Talled Palm Beach Areas A and B (Public Meeting)	8/12/2021	3:00 PM – 5:00 PM
9.	Review Panel Score Sheets Talled Martin and St. Lucie Counties (Public Meeting)	8/13/2021	10:00 AM – 12:00 PM
10.	Review Panel Score Sheets Talled Indian River and Okeechobee Counties (Public Meeting)	8/13/2021	2:00 PM – 4:00 PM
11.	Presentation to AAAPB/TC, Inc. Board of Directors of proposal scores and rankings and contract award decision will be made.	8/24/2021	8:30 AM

	4400 North Congress Avenue West Palm Beach, FL 33407 (Public Meeting)		
12.	Post Intent to Award Contracts on AAAPB/TC website and Notice of Contract Award mailed to all bidders	8/24/2021	5:00 PM
13.	Deadline for Written Notice of Protest to be filed. (Within 72 hours of after the posting of intended decision.)	8/27/2021	5:00 PM
14.	A protest with respect to an award of contract shall be submitted to the Chief Executive Officer in writing within ten days of award.	9/06/2021	5:00 PM
15.	Upon receipt of the formal written notice of protest, the Chief Executive Officer shall have up to seven (7) days (excluding Saturday, Sunday, and legal holidays) after receipt of the formal written notice of protest to resolve it through mutual agreement.	9/10/2021	5:00 PM
16.	If the protest is not resolved by mutual agreement with seven (7) days (excluding Saturdays, Sundays, and legal holidays), a special meeting of the Board Officers shall be called to conduct a bid protest meeting. The Board shall make a recommendation for final action to the Board of Directors.	9/14/2021	
17.	Final date for AAAPB/TC Board of Directors to render a decision regarding appeal(s)	9/17/2021	
18.	Face to Face Reviews with selected agencies	8/30/2021 – 9/3/2021	
19.	Contracts finalized and mailed	9/17/2021	

D. Funding

1. Sources

- a. This contract is wholly funded through the Older Americans Act of 1965 as amended. The estimated available funding for contracts is \$5,657,000.
- b. Pursuant to the Older Americans Act a match of 10 percent local match is required which must be utilized as the federal funds are spent at no less than a 90:10 percent ratio.
- c. The match requirement may be satisfied by cash and/or in-kind resources, for example:

Total Budget	\$150,000
Minimum Match (10%) cash or in-kind	15,000
Federal Funds	135,000

Other Federal funds cannot be used as match.

- d. The amounts granted to each recipient by the AAAPB/TC may be based on historical funding formulas, geographical area served, demographic data, number of proposers' responding to the bid request, or a combination of the preceding methods or any other reasonable methods as determined by the AAAPB/TC.
- e. All awards are subject to the AAAPB/TC's receipt of Federal Older Americans Act funds. If the final actual funds made available to the AAAPB/TC are less than originally projected, then a reconsideration of the awards will be made with the likelihood of reductions or cancellations occurring.
- f. Bidders must include estimated program income (i.e. donations, contributions) to be received and spent to expand programs during the contract period.
- g. Bidders for funding under Title IIIC-1 and IIIC-2 must also include the estimated NSIP commodity allowance or cash-in-lieu of commodities.

2. Funding Period and Renewal Period

The OAA contract awarded through this RFP process may be renewed for five additional years, contingent upon satisfactory performance and availability of funds. The proposed budget and unit cost submitted by an applicant must be for a one year period. In submitting a proposal in response to this RFP, the applicant agrees that the proposed budget and unit cost could also apply in all possible renewal years under the contract. Changes to unit costs during any renewal year can only be done through contract amendment between the AAAPB/TC and the designated provider. Any renewal of a contract shall be subject to mutual agreement, confirmed in writing and subject to the same terms and conditions set forth in the initial contract.

An award for the first year under this RFP does not constitute automatic renewal for years 2 through 5. Subsequent years are conditional upon AAAPB/TC Board approval. Reasons for non-renewal may include, but are not limited to: lack of compliance to the terms of the contract, outstanding program or fiscal issues, lack of meeting the needs of the client, lack of administrative oversight resulting in clients being unserved or underserved, numerous substantiated client complaints, significant under expenditure of funds, significant audit findings, and inaccurate E-CIRTS data. These issues will be reviewed and taken into consideration prior to the AAAPB/TC Board's annual renewal of contracts. Should the AAAPB/TC Board elect not to renew its contract with any provider, an opportunity will be provided to the contractee to present its case.

3. Type of Contract: Unit Price

The payment type for this contract is unit price or performance based contract with an advance funds mechanism available to not-for-profit or government organizations.

4. Allowable Costs

The proposer shall comply with the provisions of Code of Federal Regulations Part 200 – Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards.

The following is a partial list of UNALLOWABLE costs.

- Congratulatory/ Condolence Telegrams
- Flowers
- Entertainment (tickets to sporting event, shows, etc.)
- Refreshments such as coffee and doughnuts, snack foods, etc.
- Coffee pots, coffee mugs, microwave ovens, portable fans or heaters, etc.
- Decorative Items {globes, statues, clocks for private offices, potted plants, picture frames...etc.)
- Greeting Cards
- Alcoholic Beverages
- Bad Debt
- Fines and Penalties
- Presentation of plaques for outstanding service
- Meals
- Lobbying expenses
- Fundraising expenses

5. Indirect Costs

The AAAPB/TC will not allow Indirect Costs to be included as expense items in the budgets, or to be charged to any grant funded programs.

6. Subcontract Rate Increases

The AAAPB/TC will not support mid-year subcontract rate increases by recipients of Title III funds. Recipients who elect to enter into sub-contracts with other agencies are encouraged to establish their bidding process to coincide with the AAAPB/TC's grant cycle.

7. Financial Management Policy and Procedures

Recipients of Older Americans Act funds in the state of Florida must follow the financial management policies and procedures contained in the current DOEA Programs and Services Manual.

E. Method of Cost Presentation

The Method of Cost Presentation for this RFP is fixed price, unit cost. All contract costs must be presented using the Unit Costing Methodology formats for each Group bid as described in the Service Provider Application contained in Attachment III Part II to this RFP. The complete RFP Package, including spreadsheets and formulas, is available for download at:

<https://www.aaapbtc.org/public-notices>

This information must be submitted in hard copy as well as on a computer disk or USB drive. Please DO NOT attempt to change the formulas or formats in the spreadsheet. Making changes will render the worksheets unusable.

Bidders must follow the Unit Costing Methodology and provide the AAAPB/TC information in sufficient detail that allows the AAAPB/TC to determine the appropriateness and accuracy of all identified costs and rates. A consolidated unit costing worksheet must also be included in the Service Provider Application for each Group bid. Only costs allowable under the terms of this RFP and applicable federal cost principles may be included in the worksheet. Factual information

submitted by each applicant should demonstrate that costs are allowable, reasonable and necessary. Applicants are encouraged to include budget notes and any additional narrative that will give the AAAPB/TC a clear understanding of the allocation methodology followed by the applicant. Attachment III Part II Checklist Fiscal must be submitted.

If in-kind match is used, the value must be:

- Necessary for the achievement of the service objective;
- Fair and reasonable;
- Not in excess of the amount which would be allowable if the donated items had to be paid for;
- Claimed only after the resource is actually used by the provider; and
- Not included as match for any other federally assisted program except where federal regulations permit.

The AAAPB/TC is not liable for any costs incurred by the applicant in responding to this request for proposal nor for any other pre-contract costs. Federal funds cannot be used to cover the cost of preparation for the RFP.

F. Method of Payment

1. The method of payment anticipated for any contract(s) executed as a result of this RFP is unit price.
2. OAA Title III contract payments will be made monthly.
3. Non-profit and governmental agencies may request advance payment (based on availability of funds from DOEA) for anticipated expenditures for the first and second months of the annual contract.
4. Subsequent payments will be based on units delivered for each month.
5. It is the successful bidder's responsibility to maintain services without interruption in the event that payments from DOEA/AAAPB/TC are delayed. Therefore, each successful bidder must provide a signed statement of assurance of the availability of adequate cash to cover up to two (2) month's cash expenses.
6. In order to receive monthly payments, the successful bidder must submit a monthly invoice which will be formatted and provided by AAAPB/TC upon successful execution of a contract.
7. The AAAPB/TC reserves the right to delay payments to agencies who do not submit accurate reports in accordance with stipulated deadlines or who are not in compliance with the terms of its contract

G. Proprietary and Confidential Information

All information submitted as part of, or in support of, proposals will be subject to the Public Records Act, Chapter 119, Florida Statutes.

1. If a bidder considers any portion of any information that is submitted in response to this RFP to be exempt from disclosure under the Public Records Act, including but not limited to trade secret information, the bidder must clearly mark only those portions of the submission that are statutorily exempt from the Public Records Act and must state on the relevant document the statutory basis for the exemption.
2. The bidder then must also provide the AAAPB/TC with a separate redacted copy of its proposal. The redacted copy shall contain the bidder's name on the cover and clearly be marked "Redacted Copy." This redacted copy must be provided to the AAAPB/TC at the

same time the bidder submits its proposal in response to the RFP and only that information that is statutorily exempt from disclosure under the Public Records Act may be redacted.

3. The bidder shall be responsible for defending its determination that the redacted portions of its proposal are exempt from disclosure under the Public Records Act. Further, the bidder shall protect, defend and indemnify the AAAPB/TC for any and all claims arising from or relating to the bidder's determination that the redacted portions of its proposal are legally exempt from disclosure.
4. If the bidder fails to submit a Redacted Copy with its response, the AAAPB/TC is authorized to produce the entire submission of the bidder in response to any public records request for such records. The AAAPB/TC assumes no liability for disclosure or use of unmarked material containing trade secrets or other confidential material and may use or disclose such data for any purpose.

H. Acceptance of Proposals

NOTE: APPLICANTS THAT INTEND TO SUBMIT A PROPOSAL IN MORE THAN ONE DESIGNATED SERVICE AREA OR FOR MORE THAN ONE GROUPING OF SERVICES MUST DO SO IN SEPARATE APPLICATIONS. EACH OF THE APPLICATIONS MUST COMPLY WITH THE SUBMISSION PROCEDURES OUTLINED IN THIS RFP TEXT.

Proposals must be received by the AAAPB/TC at the following location by the due date stipulated in the timeline in the RFP text:

**Nancy Yarnall, Director of Consumer Care and Planning
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
4400 North Congress Avenue
West Palm Beach, FL 33407**

Each proposal will be dated, time marked and logged by the AAAPB/TC as received.

Bid documents received after the deadline will be verified and initialed by the Contact Person. A letter explaining that the proposal was disqualified for not meeting the RFP deadline stipulations will be sent to the bidder within 5 calendar days.

Only those bids which are valid and responsive to the RFP will be accepted and evaluated. In order to be considered, the bidder organization must be either a public, governmental, profit or non-profit incorporated entity.

The AAAPB/TC will not be responsible for the late arrival of proposals due to inadvertent errors made by mail or courier services, traffic delays or any other circumstances.

The AAAPB/TC may, at its sole and absolute discretion, and at any time in this solicitation process waive any minor irregularities in this Request for Proposal solicitation or in the proposals received as a result of this RFP. Minor irregularities are those which will not have a significant adverse effect on overall competition, cost or performance. The AAAPB/TC will not be responsible for incomplete or illegible proposals.

The AAAPB/TC reserves the right to require modifications and written clarification of any unclear or confusing material submitted. This includes all fiscal and program sections of the RFP that have qualitative or quantitative deficiencies unacceptable to the AAAPB/TC.

The original of the proposal must contain, where required, an original signature of an official of the bidder authorized to bind the bidder to the proposal.

It is the responsibility of the bidder to assemble the proposal correctly organized, paginated and collated. The AAAPB/TC will not verify that a proposal has been assembled correctly nor reorganize a proposal that is incorrectly submitted.

Each proposal submitted in response to the RFP shall remain binding on the applicant for a period of 210 days after the proposal due date.

I. Withdrawal of Proposals

Unless withdrawn as provided herein, proposals shall be irrevocable until contract execution. A proposal may be withdrawn in writing only prior to the deadline for receipt of proposals specified in the RFP Timeline. Any written requests to withdraw a proposal must be addressed to the Contact Person responsible for this solicitation process.

J. Notice of Contract Award

Notice of final contract award shall be posted on the AAAPB/TC website as stipulated in the RFP Timeline. The AAAPB/TC will award contracts based upon the evaluation methodology and criteria in the RFP. The decision to award a contract will be based upon the proposal receiving above the minimum score listed in the Rating Scale in Section VIII. The amount of the award will depend upon all services bid in the program in the designated service area and competition among services. Awards will be based upon the highest score for a service except where services differ in terms of service delivery, service content, and/or service targeting. In this case multiple awards may be made to ensure meeting as broad a continuum of service delivery as possible to targeted populations.

The AAAPB/TC reserves the right to waive any minor irregularity in any proposal. Regardless of any other statements in this RFP, the AAA reserves the right to reject any one or all proposals; to re-advertise this Request for Proposal; to postpone or cancel the solicitation process; to waive any informality in any proposal; and to award the contract in the best interest of the AAA based on the requirements of the RFP. The AAA, likewise, reserves the right to reject the proposal of any proposer who has previously failed to perform properly or to complete on time, contracts of similar nature; or who is not in a position to perform the contract.

Unsuccessful bidders will be notified of their right to appeal the AAAPB/TC's decision using the procedures outlined in the AAAPB/TC's Appeal Procedures (see Section IV. M.).

K. Emergency Contracts

If, in the sole determination of the AAAPB/TC, a disputed contract award may result in "serious danger to the public health, safety or welfare" of elderly consumers, the AAAPB/TC reserves the right to contract with a provider of choice on an interim basis to maintain the delivery of services until the appeal is resolved.

L. Nonexpendable Property

1. Nonexpendable property is defined as tangible property of a nonconsumable nature with an acquisition cost of \$5,000 or more per unit, and expected useful life of at least one year; and hardback bound books not circulated to students or the general public, with a value or cost of \$250 or more. Hardback books with a value or cost of \$25 or more should be classified as an operating capital outlay (OCO) expenditure only if they are circulated to students or the general public.
2. All property purchased under contracts covered by this agreement or purchased by the Area Agency and received by the recipient shall be listed on the property records of the recipient. Said listing shall include a description of the property, model number, manufacturer's serial number, funding source, information needed to calculate the federal and/state share, date of acquisition, unit acquisition cost, property inventory number and information on the location, use and condition, transfer, replacement or disposition of the property.
3. A physical inventory of equipment shall be taken and the results reconciled with the equipment records at least once every two years. Discrepancies shall be investigated to determine the difference. Any loss, damage or theft of equipment shall be fully investigated and fully documented and if the equipment is purchased with state or federal funds, shall be reported to the AAAPB/TC. The property records must be maintained on file and shall be provided to the AAAPB/TC upon request.

M. Appeal Procedures

A protest with respect to an award of contract shall be submitted to the Chief Executive Officer in writing within ten days of award.

Upon receipt of the formal written notice of protest, the Chief Executive Officer shall have up to seven (7) days (excluding Saturday, Sunday, and legal holidays) after receipt of the formal written notice of protest to resolve it through mutual agreement.

If the protest is not resolved by mutual agreement with seven (7) days (excluding Saturdays, Sundays, and legal holidays), a special meeting of the Board Officers shall be called to conduct a bid protest meeting. The Board shall make a recommendation for final action to the Board of Directors.

STANDARDS FOR APPEAL

1. No submission made after the proposal opening that amends or supplements the proposal will be considered on appeal.
2. The burden of proof shall rest with the party appealing the AAAPB/TC's intended decision.
3. The decision maker must determine whether the AAAPB/TC's proposed action is contrary to its governing statutes or rules, or to the specifications in the RFP. The burden of proof for the appellant is whether the AAAPB/TC's intended decision is clearly erroneous, contrary to competition, arbitrary or capricious.

SECTION V - CONTRACT TERMS AND CONDITIONS

- A.** Bidders of Title III funds must agree to comply with the terms and conditions of the Standard Agreement (Attachment I), as well as any additional or revised conditions mandated by the Department of Elder Affairs and/or the AAAPB/TC subsequent to the issuance of this Request for Proposal.
- B.** The Service Provider Application (Attachment III Part I) is the proposal document which, if accepted for funding, will be referenced in the contract.
- C.** The OAA contract awarded through this RFP process may be renewed for five additional years, contingent upon satisfactory performance and availability of funds. An award for the first year under this RFP does not constitute automatic renewal for years 2 through 5. Subsequent years are conditional upon AAAPB/TC Board approval. Reasons for non-renewal may include, but are not limited to: lack of compliance to the terms of the contract, outstanding program or fiscal issues, lack of meeting the needs of the client, lack of administrative oversight resulting in clients being unserved or underserved, numerous substantiated client complaints, significant under expenditure of funds, significant audit findings, and inaccurate E-CIRTS data. These issues will be reviewed and taken in consideration prior to the AAAPB/TC's Board annual renewal of contracts. Should the AAAPB/TC Board elect not to renew its contract with any provider, an opportunity will be provided to the contracted provider to present its case.
- D.** In the event of non-renewal, the AAAPB/TC may at its sole discretion enter into negotiations with new providers for services for subsequent years.
- E.** The maximum allowable reimbursable rate increase for years two through five for each service will be determined by the AAAPB/TC. Rates will be negotiated annually. Costs in excess of any AAAPB/TC approved rate increase must be supported through other local resources.
- F.** The bidder is required to have an annual financial and compliance audit performed by independent auditors in accordance with the current Government Auditing Standards ("Yellow Book") issued by the Comptroller General of the United States. Bidders shall comply with the audit requirements in accordance with the Single Audit Act Amendments of 1996 and 2 CFR Part 200.

SECTION VI - INSTRUCTIONS FOR DEVELOPING PROPOSALS

- A. The bidder must submit an original signature copy plus six (6) copies for a total of seven (7) of the Service Provider Application (SPA) as well as an original signature copy plus six (6) copies of the Separate Package in matching, three-ring loose-leaf notebooks. In addition the bidder must provide electronic copies of both the Service Provider Application and Separate package on CD or jump drive. The Contract Module portion of the Service Provider Application must be submitted on a separate CD/jump drive from the Program Module. Blue ink should be used for original signatures and the original signature set should be clearly identified. Only one copy of the Exhibits portion of the Separate Package (Section R) is required. This should be included with the original signature set of the proposal.
- B. Each copy must be labeled on the cover to note the bidder agency, designated service area, and grouping of service (Group one, two, three, four or five).
- C. The format of the Service Provider Application and Separate Package is to be strictly followed. Both the Service Provider Application and the Separate Package have separate Table of Contents. Each heading noted on the Table of Contents must be referenced within the body of the application. Additional format instructions:
 - 1. The Service Provider Application is to be typed or computer-generated on 8 1/2" x 11" letter size paper and be legible for copying. Number all pages at the bottom and center of the page. All pages must be numbered beginning with page "1", consecutively through the last page of the SPA. . Please use the Table of Contents found in the SPA instructions.
 - 2. Similarly, the Separate Package is to be numbered, beginning with S-1, consecutively, through the last page of the Separate Package. Please use the Table of Contents found in the Separate Package instructions.
- D. The bidder must include a Statement of No Involvement (Exhibit I Form) indicating that neither the bidder nor any person with an interest in the agency had a non-competitive contract involving the preparation of this RFP.
- E. The bidder must include a statement (Exhibit I Form) signed by an authorized representative indicating acceptance of the terms and conditions of the Standard Agreement.
- F. The bidder must include a signed Statement of Assurance (Contract Module) that adequate cash is available to cover up to two (2) month's cash expenses. Refer to Section IV, I.

SECTION VII - INSTRUCTIONS FOR THE SEPARATE PACKAGE

The following information is required to be submitted as a Separate Package. These informational pages must accompany the Service Provider Application (SPA).

These pages are not attachments to the SPA, but are to be placed directly behind the SPA. These pages should be numbered consecutively S-1, S-2, S-3, etc.

The material is subject to AAAPB/TC monitoring throughout the program year. Please submit seven (7) sets of the Separate Package, each with a Table of Contents (see Form 1). However, please note that only the original signature copy of the Separate Package is to include a copy of the Exhibits (Section R).

A. Service History

Describe your agency's history of service with particular reference to its effectiveness in serving older persons and caregivers. Include information on capacity and experience in direct service delivery as well as information and assistance. Full disclosure on information pertaining to past irregularities in terms of organizational inefficiency, audit findings, expenditure of funds, delivery of consumer services or other issues as cited by regulatory agencies should be identified and explained regarding resolution. This information will be helpful in judging the ability of the bidder to comply with contractual mandates such as administrative oversight and service objectives.

B. Service Delivery

For any of the services listed below which are included in Section III.A - Description of Service Delivery of the Service Provider Application and which you currently provide include specific detail as outlined below regarding your agency's current delivery of these services.

1. For Adult Day Care and Adult Day Health Care outline current hours of operation. Provide a list of current social and health activities. Transportation must be a function of the program. Describe how Transportation arrangements for day care participants (including those with physical limitations) are currently accomplished.
2. For Caregiver Training and Support provide a training outline if these services are currently being offered.
3. For Companionship, Escort, Home Health Aide, Homemaker, Personal Care, and Respite services describe current policies for retaining workers. Provide a breakdown of current staff as to whether they are employees or contractors. Outline current hours of operation.
4. For Congregate and Home-Delivered Meals outline any current special menus to meet particular dietary needs or basic ethnic or religious special menus as well as the special menus planned to be offered. Describe locations, dates, and hours of operation. List holiday congregate meal site closures planned for the year.

Describe how the following specifications are met:

1. Delivery:
 - a. Transportation: Trucks and vans capable of holding food at the required temperature and are clean and well maintained;
 - b. Delivery sites: Addresses and location of dining centers to be served;
 - c. Delivery Schedule:
 - i. Number of days per week and specific days of required service;
 - ii. Number of holidays and days when meals are not to be served;
 - iii. Number of meals served with a time schedule for ordering additional or cancellation of daily meal counts; and
 - iv. Delivery schedules with a description of the time span between food packaging and delivery (to the extent possible not to exceed 4 hours). Preference should be given to the vendor that provides the best quality and the shortest time span between packaging and delivery of hot food.
 - d. Containers:
 - i. Food packaging style for transport;
 - ii. Food transport equipment specifications; and
 - iii. Responsibility for purchase and maintenance of the food transport equipment.
2. Menus: Menus shall be written per DOEA standards specified in this handbook and include the following:
 - a. Name and title of person who completed the menus;
 - b. Name and title of person who approved the menu;
 - c. Statement indicating which menu development methodology the vendor is utilizing;
 - d. Menus must indicate serving sizes of all components; and
 - e. Requirement that menus must be submitted to the project director at least six calendar weeks in advance of implementation. Nutrition Program's qualified dietitian must approve menus.
 - f. Provision for evaluation of menu acceptability and menu revisions; and
 - g. Requirement to obtain prior approval by the nutrition service provider's qualified dietitian for all menu substitutions outside of a pre- approved menu substitution list.
3. Food Safety and Sanitation: The following food safety and sanitation requirements must be addressed in the vendor contract:
 - a. Requirement for documentation of a food safety management program within the facility that meets or exceeds the minimum requirements of federal, state, municipal, or other agencies authorized to inspect or accredit the food service operation;
 - b. Requirement to provide documentation of the three most recent food preparation inspections conducted by the state regulatory authority;
 - c. Requirement to provide a written plan of correction for any high priority or significant findings on sanitation inspections;
 - d. Requirement to notify the Nutrition Provider immediately for any closures or Administrative Complaints regarding food safety; and notify the Nutrition Provider within 24 hours of any sanitation inspections;
 - e. Description of vendors' delivery standards and sanitation that includes holding temperatures for transporting and serving food; and
 - f. Right of the nutrition program, AAA, or Department staff to inspect the food preparation and storage areas.

4. Food Service: The following food service topics must be included:
 - a. Number of meals and unit price for meals and other food served;
 - b. Breakdown of bid price for the raw food cost, labor, transportation, equipment, paper and plastic supplies, profit and other costs;
 - c. Food provided, including:
 - i. Entrée;
 - ii. Grain;
 - iii. Vegetable;
 - iv. Fruit;
 - v. Milk;
 - vi. Juice;
 - vii. Salad;
 - viii. Beverage;
 - ix. Cream/substitution;
 - x. Condiments; and
 - xi. Butter/margarine.
 - d. A provision stating that the nutrition program is not required to pay for food not meeting the proper specifications.
 - e. A provision stating that the nutrition program will procure food from other sources at the vendor's additional expense, if the vendor: fails to deliver a meal or any portion of a meal, delivers food that was spoiled, out of date, or otherwise inedible.
 - f. A provision addressing supply of substitution food items to be kept at the meal site in case a substitution is necessary. If a supply of substitution items is kept on site, then a system must be in place to ensure all food items are used prior to the product's expiration date, use-by date, sell-by date, or best-by date.
 - g. Administration:
 - i. Schedule and method of payment to the food vendor;
 - ii. Sales tax exemption;
 - i. Responsibility for product liability insurance and property damage;
 - ii. Bonding;
 - iii. Requirement that the vendor's financial records are open for audit purposes;
 - iv. AAA approval; and
 - v. Binding time of the contract, as well as the termination process agreed upon by both parties.
5. For Nutrition Counseling and Education, outline efforts to assist eligible clients with applying for and accessing Food Stamps. Detail your agency's current ability to deliver services to populations of Limited English Speaking Ability.
6. For Counseling (Gerontological) or Counseling (Mental Health/Screening) provide an outline of current and or proposed group counseling schedules. Include the targeted population, method of delivery and need being addressed.
7. For Emergency Alert Response System describe in detail how your agency's current system meets the delivery standards and special conditions required in the current DOEA Programs and Services Manual. Describe your agency's capability to produce reports from logs of signals received.
8. For Escort describe your current ability to provide language interpretation for the hearing impaired or bilingual services for non-English speakers. Delineate the current equipment used to assist the mobility of the disabled (i.e., steps, walkers, wheelchairs and sliding guards).
9. For Disease Information and Health Promotion, report on the success of any current programs involving health issues and detail any measurable benefits which have resulted. Include collaborative community partners involved in these efforts.

10. For Interpreter/Translating Services define how referrals are accepted, requests fulfilled, and the specific types of oral and written interpretation/translation services that are currently being delivered.
11. For Legal Assistance describe how any of the following broad categories of Legal Assistance specified in the OAA are currently made available through your agency: Income; Health Care; Long-term Care; Nutrition; Housing and Utilities; Defense of Guardianship; Abuse, Neglect and Exploitation; Age Discrimination; Protective Services.
12. For Outreach include a table format which:
 - i. Describes all outreach efforts conducted during the previous year
 - ii. Include dates and locations, including zip code
 - iii. Provide the reason why that specific area was selected for outreach
 - iv. Detail whether outreach was conducted during business or non-business hours or on a holiday+
 - v. Provide the number of consumers reached
 - vi. Detail targeting efforts to reach persons 60+ below poverty level, persons 60+ living alone, minority persons 60+, low-income minorities 60+ below 125% of poverty level, persons 60+ living in rural areas, and low-income minority individuals 60+ with Limited English Proficiency.

C. Program Narrative

1. Profile of the Service Area(s)

Provide a clearly written overview of the social and economic characteristics of the service area(s). Identify major communities or neighborhoods and describe economic and social resources. Discuss the current service system in place to meet the needs of the elders and their caregivers and include private, public and governmental agencies. Outline the role of the bidder agency in coordinating or collaborating with these entities.

The profile of the service area(s) must clearly summarize the conditions of older persons and of caregivers. Charts, statistical tables and graphs may be used to illustrate these conditions. At least one map of the service area(s) is to be included to visually display the service area(s).

The following topics should be incorporated when describing your community and neighborhoods:

- Population characteristics (age cohorts, including those 85+ and those 18 years-of-age and under)
- Areas of older persons with low incomes
- Concentrations of ethnic, minority, and older persons
- Indication of caregivers described according to care recipient's age and limitations
- Locations of socially isolated older persons
- Housing conditions and availability for low-income elders
- Emerging areas of concern
- Services or programs provided by other organizations supporting caregivers and elders
- Locations of older persons living in medically underserved areas

2. Needs of the Community

Describe the needs and problems of older persons, their caregivers, and older individuals who are relative caregivers who provide care for children who are not more than 18 years old or individuals with a disability in your area of service. Explain how the services you are proposing will address these needs and problems. Provide information on other agencies which have been (or are) providing like or similar services such as you are proposing, including coordination strategies.

This section should clearly identify the needs of older persons and caregivers in your service area(s) and describe the methodology and process employed in assessing and determining those needs. The narrative should reference all statistical and data sources, and discuss the use of information and data both internally and externally. A description of unmet service needs must also be presented, including efforts to secure other community collaborative partners to address those needs.

3. Advocacy on Behalf of the Elderly and their Caregivers

All recipients of OAA, Title III funding undertake the inherent obligation to provide community leadership on aging issues; and to advocate for the interest of older persons and their caregivers. "Advocacy" is initiating positive changes in public or private policies and attitudes towards older persons; or taking action to improve, modify, or eliminate situations which adversely impact on lives of older persons and/or their caregivers; or by expressing support for older persons, their caregivers, and the interests of both. Advocacy activities may be broadly supportive of the general interests of older persons and their caregivers, or they may involve specific activities on behalf of individuals. Describe your agency's advocacy process and initiatives that demonstrate effective systematic and coordinated advocacy efforts that have occurred during the past 12 months. What changes occurred in the community and/or within your organization as a direct result of your local advocacy efforts?

4. Coordination with Other Service Agencies/Programs

Describe coordination and linkages with other service providers, organizations and programs operating in the same area. Include copies of any interagency agreements. Specific reference is to be made concerning coordination, cooperation, collaborative programming and referral processes with the following agencies/organizations:

- a. Community Care for the Elderly Lead Agencies
- b. Community Mental Health and/or Substance Abuse Centers
- c. Adult Protective Services
- d. Organizations serving the blind or physically disabled
- e. County Health Department
- f. Developmental Services
- g. Area Agency on Aging Helpline
- h. Home Care for the Elderly
- i. Faith-Based Community Organizations
- j. DOEA SHINE (Serving Health Insurance Needs of Elders)
- k. Retired and Senior Volunteer Program (RSVP) and other volunteer programs
- l. Local DOEA CARES Office
- m. Designated HUD housing facilities
- n. Literacy Coalitions

- o. Alzheimer's Organizations
- p. Veterans' Administrations or Veterans' Services Officers
- q. Other agencies in the service area(s)

5. Information and Referral

All recipients of Older Americans Act funding are to be responsive to requests for information or assistance from older persons or on behalf of older persons. Responses to such requests for information or assistance should include any necessary referrals to other agencies depending on the indicated needs.

Describe your strategy for being responsive to inquiries from older persons or their caregivers for information or assistance. Summarize your internal practices to maintain an up-to-date resource file on programs, services, aids and benefits for older persons and their caregivers, which are available in the community.

6. Outreach

Outreach is an access service and is a required service or function in Title IIIB and Title IIIC. Outreach is defined as a face-to-face, one-to-one intervention with clients initiated by the agency for the purpose of identifying potential clients or caregivers and encouraging their use of existing and available resources. Targeted groups and individuals include:

- a. Older individuals residing in rural areas
- b. Older individuals with greatest economic need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas)
- c. Older individuals with greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas)
- d. Older individuals with severe disabilities
- e. Older individuals with limited English-speaking ability
- f. Older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals)
- g. Older individuals at risk for institutional placement
- h. Caregivers
- i. Caregivers of older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction;
- j. Grandparents or older individuals who are relative caregivers who provide care for children with severe disabilities;
- k. Caregivers who are older individuals with greatest social need;
- l. Caregivers who are older individuals with greatest economic need (with particular attention to low-income older individuals); and
- m. Caregivers who are older individuals who provide care to individuals with severe disabilities, including children with severe disabilities.

Describe in this section how these target groups are identified within your service area(s), service needs, barriers to services, coordination with other agencies and strategies to increase services.

7. Consumer Confidentiality

Each bidder should describe the system to be used in development, maintenance, and management of case records and files on persons receiving services. Explain the system used for safeguarding confidentiality of consumer records.

8. Program Income

Program income is defined in the current DOEA Programs and Services Manual as income earned by a provider from activities, part or all of the cost of which is either borne as a direct cost by a grant or counted as a direct cost toward meeting a cost sharing or matching requirement of a grant. Program income must be accounted for separately and expended only to expand services. Program income may not be used as match.

Each bidder is to include in this section planned strategies/methodologies utilized for each proposed service to obtain voluntary consumer contributions. Also, initiatives taken at the provider level must occur while assuring that no participants are given the impression that contributions are mandatory to receive any Older Americans Act (OAA) sponsored services. If a bidder uses a suggested contribution schedule, it is to be included in this section.

9. Maximum Utilization of Non-Title III Resources

Older Americans Act grant funds are not intended to support the full operation of any organization. Bidders are expected to seek out additional sources of funds to achieve objectives and meet other agency operating expenses. Bidder agencies should indicate clearly their proposed support from sources other than the Older Americans Act.

Adequate match is a basic requirement, but additional resources which strengthen or expand basic service delivery or which add services not funded by Title III funds should be secured.

Describe your agency's plan for obtaining and utilizing funding resources from the private and public sector including grant writing and fundraising fund-raising efforts.

10. Utilization of Volunteers

Whenever possible, Title III Service Providers should utilize the skills, experience, and energies of volunteers, particularly older volunteers, to expand services to seniors in their service area(s). Some examples of this are volunteer aides, senior employment programs, Advisory Councils, and Boards of Directors. In this manner, Service Providers can leverage the funding provided by public and private funding entities.

Describe how your agency utilizes volunteers to enhance and expand services. Outline recruitment, orientation, and ongoing training and recognition efforts for volunteers. Detail the services which volunteers provide and quantify the number of individual volunteers serving your organization and the amount of hours they provide annually. What are your policies and strategies for risk management, supervision and evaluation, and records retention?

This information may be submitted in the form of an agency adopted Volunteer Manual if this document includes all of the required items listed above

D. Information Collection and Analysis

The internal collection, tracking and analysis of programmatic, consumer-specific and fiscal information is incumbent upon each successful bidder. While, the AAAPB/TC is charged with the responsibility to monitor and evaluate each agency's performance in terms of compliance with all aspects of the contract, it is the Title III funds recipient's primary responsibility to ensure full expenditure of funds, achievement of service units, compliance with the consumer's plan of care, the integrity of consumer data and the delivery of quality services.

Describe your agency's system of collecting, tracking, updating, projecting, managing and analyzing your agency's programs. Each area is to be addressed separately and include both programmatic, fiscal and E-CIRTS (if applicable). For each of the programs you manage provide a report card of your agency's surplus/deficit history in terms of expending funds awarded. Data should be broken out by program and frequency (e.g. Title III-B, Title III-C, Title III-D, Title III-E), indicating the assigned lead staff. The bidder may elect to complete this section in either a table or grid format, provided all the required information is included.

E. Grievance and Complaint Procedures for Consumer Complaints

Describe the approved procedures for handling consumer complaints from consumers regarding improperly denied services, services which have been reduced, terminated or, in the consumer's opinion, adversely impacted. Explain the process for timely resolution and any procedures for appeal to an impartial decision maker. Specify how consumers are informed about the grievance process and procedures to appeal the service denial. Attach a copy of your agency's grievance procedure as Exhibit XIII, confirming board approval and indicating the date of approval. All policies must be developed in accordance with DOEA's Minimum Guidelines for Recipient Grievance Procedures as described in Appendix D of the current DOEA Programs and Services Handbook and are subject to approval by the AAAPB/TC.

Complaint procedures shall address the quality and timeliness of services, provider and direct service worker complaints, or any other complaints not related to termination, suspension or reduction in services which require the grievance process as described in Appendix D of the current DOEA Programs and Services Handbook. Describe your organizations complaint procedure, including notification to all clients of the complaint procedure and the tracking of the date, nature of complaint and the determination of each complaint

F. Disaster/Emergency

Analyze your plan for continuing or discontinuing services in the event of a disaster or emergency condition that would adversely impact the service area for your agency. Include a description of the process for call down to clients and resumption of services as well as your plan for functioning from an alternate location.

Comment on the extent to which this plan was successfully employed in the past.

All bidders must include a copy of their Board Approved Emergency Preparedness Plan as Exhibit XIV. Date of approval is to be noted.

G. Unusual Incidents

Each recipient of Title III funds is required to maintain files on unusual incidents such as accidents or altercations involving services or consumers. Submit your policy on reporting, recording and reviewing unusual incident files. Include as Exhibit XV.

H. Special Licensure Assurance

Minimum requirements for persons providing Gerontological Counseling are a bachelor's degree in social work, psychology, sociology, nursing, gerontology, or related field. Year for year related job experience or any combination of education and related experience may be substituted for a bachelor's degree upon approval of the AAAPB/TC. Gerontological counseling may be conducted by paid, donated, and volunteer staff. Volunteer staff shall meet comparable standards as paid staff.

Providers of caregiver training and support events shall be qualified by training or experience in the area on which training is being conducted. The training must be evidence-based training (i.e. Powerful Tools for Caregivers or REACH (if DOEA approval is obtained) or similar).

Providers of specialized mental health services (Counseling – Mental Health/Screening) shall be:

1. Psychologists licensed by the Department of Health in accordance with Chapter 490, Florida Statutes; or,
2. Clinical social workers, marriage and family therapists or mental health counselors licensed by the Department of Health in accordance with Chapter 491 Florida Statutes. Provide a copy of the license.

Each bidder proposing to offer Adult Day Health Care services must be a facility licensed under Chapter 429, Part III, F.S. and Chapter 58-A-6 F.A.C. Adult Day Care Rule. Provide a copy of the license.

Each bidder proposing to offer Adult Day Care services must be licensed under chapter 429, Part III, F.S. and Chapter 58-A-6 F.A.C. Provide a copy of the license.

For Case Managers, the minimum requirements for new case managers are a bachelor's degree in social work, psychology, sociology, nursing, gerontology or related field. Year-for-year related job experience or any combination of education and related experience may be substituted for a bachelor's degree upon approval of the AAA.

For Housing Improvement, all applicable federal, state and local building codes are to be followed in repair work and required licenses and instructions obtained.

Home Health Aide service must be provided in accordance with the regulation of home health agencies in Chapter 400.488 F.S. and Chapter 59A-8.020 Florida Administrative Code.

Sign Language Interpreters shall be certified by the National Registry of Interpreters for the Deaf under the Screening Program of Florida Registry of Interpreters for the Deaf. Provide a copy of the certificate.

Nutrition counseling must be provided by a licensed dietician and/or licensed registered dietician (Section 468.516 F.S.) Registered and licensed dieticians must have their own personal liability insurance. Provide a copy of the license.

Personal care service shall be provided in compliance with the regulation of the home health agencies in Chapter 400, Part IV, Florida Statutes, and Chapter 59A- 8, Florida Administrative Code. Personal care assistants shall meet background screening requirements in accordance with Chapter 400.512, Florida Statutes, and Chapter 59A-8.004(10) and (11), Florida Administrative Code.

Legal Assistance providers must be licensed in accordance with Chapter 454.021, Florida Statutes. Provide a copy of the license.

I. Automated Client Reporting Requirement and Internal Reconciliation Process

The Enterprise Client Information Registration and Tracking System (E-CIRTS) is used by the Florida Aging Network as the database for client, program and service information for the Department of Elder Affairs (DOEA) and the AAAPB/TC. Requirements for E-CIRTS are based upon federally mandated data and data required by the Florida Legislature. Modifications to these requirements may occur as federal and legislative mandates are revised. All Older Americans Act programs funded under this grant require direct input of data into the E-CIRTS program.

Funded Service Providers must maintain accurate E-CIRTS data, run regular reports, and provide analysis based upon these reports. Prospective bidders are strongly encouraged to read the individual data entry requirements, timeframes, etc., as referenced in the current DOEA Programs and Services Manual. Section III.F should also be referenced for specific hardware/software needed to operate this system.

J. Abuse, Neglect and Exploitation Reporting

In compliance with Chapter 415, F.S., an employee of the provider who knows, or has reasonable cause to suspect, that a child, aged person or disabled adult is or has been abused, neglected, or exploited, shall immediately report such knowledge or suspicion to the State of Florida's central abuse registry and tracking system on the statewide toll-free telephone number (1-800-96ABUSE).

The application is to include a statement acknowledging this obligation.

K. Personnel

1. Organizational Charts

Include one or more organizational charts for all aspects of your agency, including paid and volunteer staff, advisory council, and board of directors. If the bidder is part of an umbrella agency, provide a chart showing this relationship. Any positions which are less than full-time positions are to be indicated with an asterisk on the organization charts and the percentage of full-time shown.

2. Job Descriptions

Title III-funded agencies must have a resume or employment application for all paid staff on file. Bidders must include a written job description covering each Title III-funded or volunteer staff position included in this proposal. All significant responsibilities to be undertaken by the provider must be reflected. These job descriptions and a Statement of Assurance (including approval date) that they have been approved by the Board of Directors or governing body should be included as Exhibit V.

Job descriptions should:

- a) Detail responsibilities of each individual position
- b) Provide a listing of representative duties
- c) Explain methods of supervision
- d) Describe other positions to be supervised
- e) Identify exempt/non-exempt status in accordance with Federal Fair Labor standards
- f) Identify the minimum training, education and experience for the position.

3. Personnel Policies

Title III-funded agencies must have a written set of Personnel Policies. Bidders should ascertain that their policies adequately address each item on the following list:

- a. Employee Recruitment (include policy on vacancy announcements, application and interviewing processes, job applicant reference checks and FDLE background checks);
- b. List of publications and media utilized to publicize openings;
- c. Employee Hiring and Appointment (include policy on probationary period);
- d. Job Responsibilities, Line of Authority and Supervision;
- e. Working Schedules and Hours (include policy on overtime, compensatory time and holidays);
- f. Employee Compensation (include policy on salary/wage ranges and pay increases);
- g. Employee Fringe Benefits (include identification of benefits offered, how employees participate and the employee costs associated with fringes);
- h. Employee Evaluation and Promotion;
- i. Employee Leave (include policy on sick, annual and unpaid leave, accrual of leave and maximum leave balances);
- j. Employee Record Files (include policy on confidentiality and privacy);
- k. Employee Grievance, Appeal, Discipline and Termination;
- l. Accidents, safety and unusual incidents;
- m. Transportation/Travel (include policy on authorization and reimbursement);
- n. Employee Conduct (include policy on outside employment, protection of consumer confidentiality, solicitation, conflict of interests and employee code of conduct);
- o. Staff Development Opportunities;
- p. Procedures for selecting the Executive Director;
- q. Procedures for Americans with Disabilities (ADA) Compliance;
- r. Designation of Exempt/Non-exempt employees;
- s. Volunteer Policies.

Provide a Statement of Assurance that all Personnel Policies have been approved by the Board of Directors or governing body and include approval date. Submit Personnel Policies and Statement of Assurance as Exhibit VIII.

4. Staff Development and Training

Detail your agency's plan for staff orientation, pre-service and in-service training as well as staff development activities. Be specific as to sessions planned, training objectives, proposed trainer(s), staff member who will be attending, approximate date and length of training sessions, estimated costs and proposed funding source. Please complete Form 2.

Orientation refers to a brief explanation of the agency's mission, goals, and objectives. Orientation should be offered to new employees, new volunteers, and new members of the Board of Directors or Advisory Council.

Pre-service training refers to a special training effort for new employees involved with potential providers of service, consumers or the general public. Attendance at pre-service training is required prior to a new employee assuming duties on an unsupervised basis. Each bidder is to determine which positions require pre-service training and determine the duration (if not specified in the current DOEA Programs and Services Manual), objectives and training methodology to be used. Pre-service training may also include extensive on-the-job training under supervision.

In-service training refers to training of ongoing agency staff which covers policy or procedural changes to be implemented, provides staff with opportunities to benefit from job-related expertise or stimulation from other professionals in a formal or informal work related environment.

Bidders should outline the elder sensitivity, diversity and cultural competence training which staff has completed or will complete.

5. Equal Employment Opportunity and Diversity Policies

Detail your agency's procedures to ensure fair and equal opportunities for hiring, training compensation, promotion and other conditions of employment irrespective of national origin, race, disability, religion, politics, gender, sexual orientation or age. Make specific reference to ADA policies and position postings which ensure equal employment opportunities and encourage diversity.

Submit any Agency Diversity or Equal Employment Opportunity Plans or Policies approved by the agency's Board of Directors (include approval date) as Exhibit XI.

L. Corporate Annual Report Status

Include a copy or statement that your agency's status as a corporation, as applicable under Florida Statutes, is current. Also include your Articles of Incorporation as Exhibit VII.

M. Employee/Board Rosters

1. Include a current roster of employees by name and job title.
2. Include a Board-approved salary range for each grant-funded position.
3. Include a membership roster of the members of the Board of Directors (governing body) of the bidder agency, by name, occupation, profession or affiliation.

N. Subcontract Agencies

1. Provide the following information for each agency with which you plan to subcontract services under Title III funding:
2. Agency name, address, telephone number, fax number, contact person. Starting and ending date of current contract, if any. Indicate whether the agency is a minority vendor

O. Programs to Ensure Access for Limited English Proficiency Consumers

Describe your agency's efforts to ensure access for consumers with Limited English Proficiency. Include bilingual staff members, use of interpreters, telephone interpretation and relay services, and translation of written materials.

P. Quality Improvement

The pursuit of excellence is an ongoing, evolving process. Each successful achievement lays the foundation for yet another and another. In this segment of the Separate Package, the prospective bidder is required to identify a minimum of **six key elements** of its operations that it will seek to improve during 2022. The planned improvements should be specific, measurable, attainable, realistic and timely. Listed below is a partial list of possible areas for improvement. Bidders may recognize other improvement elements that are relevant to their businesses.

Client file accuracy	Outreach to targeted populations	APS high risk referrals
DOEA outcome measures	Use of non-DOEA resources	Reporting requirements
Nutrition services	Policies and procedures	Staff training and professional development
Adult day care and other services	Supervisory oversight	Vendor quality assurance
Consumer satisfaction	E-CIRTS data accuracy	Timely reassessments

Using the table provided, (Attachment IV - Template for Provider Quality Improvement Plan) record each element selected for improvement.

In Column A, identify the element for which improvement is desired.

In Column B, briefly state the challenge, obstacle, or shortcoming to quality that management wishes to improve.

In Column C, identify the actions management will undertake during the course of the year to improve this operational element.

In Column D, set a target date by which the improvement will be implemented and made operational.

Column E is reserved for reporting progress in attaining the goal by June 30, 2022. The report is due on July 31, 2022.

Column E is reserved for reporting the final status of the improvement effort as of December 31, 2022. The final report is due on January 31, 2023.

The completed Attachment IV (Template for Provider Quality Improvement Plan) should be included as Exhibit III in Section R of the Separate Package. Provide a brief summary of your agency's quality improvement plan in Section P of the Separate Package.

Q. Quality Assurance Plan

This segment of the Separate Package is a narrative of the bidder's Quality Assurance Plan. The plan should represent a comprehensive description of key elements of the bidder's operation where quality service and quality management is essential. Each description must define a measure or measures of quality. It must describe the process of taking measurements for each element, analyzing the results of the measure, and describing how management will respond to the outcome.

R. Exhibits:

One copy of each Exhibit is required, and should be included with the original signature set of the proposal. Consecutive page numbering of these documents is NOT required. Exhibits should be separated using tabbed dividers.

Exhibit I	Statement of No Involvement - See Exhibit I Form Acceptance of Terms & Conditions of the Standard Contract - See Exhibit I Form Cash Flow Commitment - See Exhibit I Form
Exhibit II	OAA General Assurance - See Exhibit II Form
Exhibit III	Quality Improvement Plan
Exhibit IV	Administrative Assessment - See Exhibit IV Form
Exhibit V	Job Descriptions for all Grant-funded Positions/Statement of Assurance
Exhibit VI	Agency Financial and Procurement Policies and Procedures
Exhibit VII	Articles of Incorporation
Exhibit VIII	Personnel Policies/Statement of Assurance
Exhibit IX	Monitoring/Evaluation Reports from External Agencies conducted within the past 3 years)
Exhibit X	Most Recent Independent Audit
Exhibit XI	Equal Employment Opportunity and Diversity Policies
Exhibit XII	Corporate By-Laws
Exhibit XIII	Grievance Procedures
Exhibit XIV	Emergency Preparedness Plan
Exhibit XV	Unusual Incidents Form

SECTION VIII - PROPOSAL EVALUATION

During **Stage I** of the proposal evaluation process AAAPB/TC staff will determine if each proposal contains all of the required parts and assurances. The form below will be used during this process. Only those proposals that, in the consensus opinion of the staff, are determined to meet the requirements of Stage I will be further evaluated.

Name of Bidding Organization: _____

Designated Service Area: _____

Grouping of Services

Group 1:_____ Group 2_____ Group 3:_____ Group 4:_____ Group 5:_____

Fatal Items

Fatal Items questions must be answered "yes" or the proposal is disqualified. Circle the appropriate response:

1. Was the Proposal received by the time and date specified in the RFP?

Yes:_____ No:_____

2. Does the Proposal include a signed Acceptance of Terms and Conditions the Standard Contract (Separate Package Exhibit I Form)

Yes:_____ No:_____

3. Does the Proposal contain a signed Statement of No Involvement? (Separate Package Exhibit I Form)

Yes:_____ No:_____

4. Does the proposal contain an original of the required title page with an original signature of a person authorized to bind the agency to all contractual obligations? (Service Provider Application Summary Information Page)

Yes:_____ No:_____

5. Is the applicant agency a public, governmental, profit or non-profit incorporated entity (Service Provider Summary Information Page)?

Yes:_____ No:_____

Stage II of the evaluation process will involve the evaluation of each proposal that meets the Stage I requirements. To assist in the application selection process, the AAAPB/TC has developed standard criteria against which applications are judged for acceptability. To complement this standard criteria, a scoring scale has been developed to facilitate uniformity in the decision-making process. The evaluation process will be conducted by a review panel of at least three persons appointed by the AAAPB/TC's CEO. The review panel team collectively will have experience and knowledge in the program areas and service requirements for which services are sought. The AAAPB/TC will ensure that no member of the review panel team has a conflict of interest which could interfere in the evaluation process. The resultant scores attained by bidders represent the primary basis for the award decisions made by the AAAPB/TC. However, within a program, multiple awards may be made where there is non-competition among services. This is predicated upon a proposal receiving a minimum score of 70 points. In the case where there is competition among the same services within a program but the service types differ in terms of service delivery, service content, and/or service targeting multiple awards may be made. In this case the reason for the multiple awards will be set forth in writing and included in the official bid file.

The AAAPB/TC reserves the right to require modifications and written clarification of any unclear or confusing material submitted. This includes all fiscal and program sections of the RFP that have qualitative or quantitative deficiencies unacceptable to the AAAPB/TC.

The Board of Directors of the AAAPB/TC is the final authority for selection of recipients of Title III funds.

RATING SCALE

The following is to be completed by the Bid Review Panel

The Rating Scale items are as follows:

- A. Program Plan
- B. Administrative Capacity
- C. Community Support
- D. Service Targeting
- E. Experience
- F. Quality Improvement Plan
- G. Quality Assurance Plan

A. PROGRAM PLAN Range: 0-25 points

The Needs Assessment of the SPA describes a systematic needs assessment process in determining local service needs. An understanding and presentation of both met and unmet needs are clearly stated and supported with documentation. The bidder convincingly demonstrates a need for the service described in III.A of the SPA. The description of service delivery in III.A of the SPA demonstrates the bidder's ability to meet this need. The Outreach section of the SPA demonstrates the bidder's ability to provide access to the service and targets one or more of the targeted populations of OAA programs and services.

The bidder's service delivery section of the Separate Package provides specific detail regarding current service delivery for the service listed in III.A of the SPA.

In the Program Narrative of the Separate Package, the bidder's Profile of the Service Area and Description of Needs of the Community demonstrate the bidder's knowledge about the community to be served and the service delivery systems in place.

In the Program Narrative of the Separate Package the bidder presents a clear and diversified advocacy plan to improve services for elders in their community.

B. ADMINISTRATIVE CAPACITY Range: 0-20 points

The bidder presents clear evidence that it possesses a high level of administrative capacity and is fully equipped to deal with the complexities inherent in the management of the Older Americans Act program. In the Separate Package, the Information Collection and Analysis demonstrates that clear and persuasive internal controls are presented that demonstrate the bidder's ability for self-assessment, projections and accurate reporting of expenditures, units of services, E-CIRTS data integrity and reconciliation, timely reporting and assuring the quality delivery of services. The application reflects careful consideration of minimum staffing requirements necessary to execute both the administrative and service delivery functions. The Special Licensure Assurance and Personnel sections of the Separate Package present sufficient evidence that the bidder has staff that possess accepted professional standards of education and experience for their assignments and that personnel have appropriate educational backgrounds and experience for their positions. The applicant must demonstrate a sound financial position and a positive track record of financial management expertise.

Included in the Personnel section of the Separate package is a detailed description of procedures for ensuring equal employment opportunity as well as policies regarding diversity.

The Separate Package includes Grievance Procedures and Complaint Procedures which specify how consumers are informed about the grievance and complaint processes as well as the procedures to appeal service denial.

The Consumer Confidentiality section of the Separate Package includes a system for development, maintenance, and management of case records and files on persons which safeguards confidentiality of consumers.

The Disaster/Emergency Plan summarized in the Separate Package demonstrates the bidder's ability to maintain continuity of operations during a disaster/emergency and the commitment to support local emergency response measures in the event of a declaration of a state of emergency by the governor and/or Secretary of the Department of Elder Affairs.

C. COMMUNITY SUPPORT Range: 0-10 points

The applicant provides clear and persuasive evidence of a well-established presence in the proposed service area. In describing Maximum Utilization of Non-Title III Resources in the Separate Package, the bidder demonstrates a significant level of broad-based support from both the public and private sectors. The section of the Separate Package dealing with Coordination with Other Service Agencies/Programs details and demonstrates effective and active partnerships between the bidder and other community organizations that support and enhance service objectives. In the Utilization of Volunteers in the Separate Packages a clear plan is presented that integrates the skills and talents of senior volunteers within the organization, including managerial capacity and recognition. Within the Program Income Section of the Separate Package the proposal contains evidence of financial and program support from a variety of sources in the service area.

D. SERVICE TARGETING Range: 0-10 points

The Separate Package details all criteria outlined in VII.B.12 Outreach. The information demonstrates a thorough understanding of the socio-demographic composition of the older population including minority populations, housing conditions, unique community and neighborhood needs, health conditions and other factors with possible service implications in the proposed service area. Outreach strategies reflect targeted populations, are measurable and demonstrate clear objectives

The objectives detailed in Section V.A of the SPA are measurable, specific, and they support the DOEA goals outlined in Section III.H. of the RFP.

E. EXPERIENCE Range: 0-5 points

The Personnel and Service History sections of the Separate Package provide persuasive evidence that the organization and the proposed project personnel are capable of effectively and efficiently delivering the proposed service(s) listed in III.A of the SPA. The applicant sufficiently demonstrates knowledge and experience in delivering the proposed service or a closely related program area. The planned service delivery described in III.A of the SPA convincingly demonstrates the advantages or benefits of this organization that supersede other applicant organizations in terms of commitment, experience and expertise.

F. QUALITY IMPROVEMENT Range: 0-10 points

A Quality Improvement Plan is included as Exhibit III of the Separate Package. It meets the criteria outlined in Section P of the Instructions for the Separate Package. The planned improvements are specific, measureable, attainable, realistic and timely.

G. QUALITY ASSURANCE Range: 0-10 points

Section Q of the Separate Package includes a description of the bidder's current Quality Assurance Plan. The plan reflects management's involvement and includes action steps as to how the organization will analyze and respond to outcome measures. The plan is comprehensive and describes specific measures of quality.

H. CONTRACT MODULE Range: 0-10 points