

Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

THE AREA

AGENCY ON

AGING FOR

*Planning and Service Area 9
(Indian River, Martin, Okeechobee, Palm Beach, and St. Lucie Counties)*

**2027 Community Care for the Elderly (CCE), Home Care
for the Elderly (HCE), Alzheimer's Disease Initiative (ADI)**

Request for Proposal (RFP)

For

Lead Agency Designation

September 2026

NOTE: THERE ARE SIX CONCURRENT RFPS - ONE FOR EACH COMMUNITY CARE SERVICE AREA (CCSA). THE COMMUNITY CARE SERVICE AREAS INCLUDE INDIAN RIVER COUNTY, MARTIN COUNTY, OKEECHOBEE COUNTY, ST. LUCIE COUNTY, PALM BEACH COUNTY AREA A AND PALM BEACH COUNTY AREA B. APPLICANTS THAT INTEND TO SUBMIT A PROPOSAL FOR COMMUNITY CARE SYSTEM LEAD AGENCY DESIGNATION IN MORE THAN ONE CCSA MUST DO SO IN SEPARATE APPLICATIONS RESPONDING TO EACH RESPECTIVE RFP TEXT AND ADDRESSING THE SPECIFIC NEEDS IN THE COMMUNITY CARE SERVICE AREA FOR WHICH FUNDS ARE REQUESTED.



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SECTION A - INTRODUCTION

1. Legislatively Mandated Requirements

The Community Care for the Elderly Act (CCE) (ss. 430.201-430.207, Florida Statutes (F.S.)) was created by the Florida Legislature to assist functionally impaired elderly persons to live dignified and reasonably independent lives in their own homes, or in the homes of relatives or caregivers. The CCE program provides a continuum of care through the development, expansion, reorganization and coordination of multiple community-based services to assist elders to reside in the least restrictive environment suitable to their needs.

Pursuant to ss. 430.203 and 430.204, F.S., the Lead Agency must be designated for each community care service system. A community care service system is defined as a service network comprised of a variety of home-delivered services, day care services, and other basic services (referred to as home and community-based services). The primary goal of the community care service system is to prevent unnecessary institutionalization of functionally impaired elderly people by providing community-based services.

In accordance with s. 430.203(9)(c), F. S., “the Lead Agency must be given the authority and responsibility to coordinate some or all of the services, either directly or through subcontracts, for functionally impaired elderly persons. These services include, but are not limited to, case management, homemaker and chore services, respite care, adult day care, personal care services, home-delivered meals, counseling, information and referral and emergency home repair services. The Lead Agency must compile Community Care for the Elderly statistics and monitor, when applicable, subcontracts with agencies providing contracted services. Pursuant to s.430.203(9), F.S., agencies must be designated at least once every six years as a result of a competitive procurement conducted through a Request for Proposal (RFP) process.

The goal of the RFP is to define the scope of work to be accomplished and convey the requirements and expectations for Lead Agency designation under the Community Care for the Elderly Act. Pursuant to s. 430.203(9)(a), F.S., these guidelines include requirements for the “assurance of quality and cost efficiency of services, minimum personnel standards, and employee benefits.”

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. has been designated by the State of Florida Department of Elder Affairs (DOEA) as the Area Agency on Aging (AAA) for Planning and Service Area 9, which covers Indian River, Martin, Okeechobee, Palm Beach and St. Lucie Counties. As such, it is identified by the State as the contracting agency of choice for the coordination and administration of the Community Care for the Elderly Program in PSA 9. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. intends to fulfill the legislatively mandated requirements referenced above by issuing this Request for Proposal (RFP) for the contract period beginning Fiscal Year 2027-2028. The CCE, HCE, and ADI contracts procured through

this RFP process may be renewed for five additional years, contingent upon satisfactory performance and availability of funds.

Community-based organizations interested in obtaining a CCE Lead Agency designation are required to submit written proposals detailing their qualifications and plans for providing case management services, coordination of home and community-based services and other Lead Agency required functions of the CCE program.

2. Statement of Need

Demographic data of the 60 years of age and over population for Planning and Service Area 9 comprising the counties of: *Indian River, Martin, Okeechobee, Palm Beach and St. Lucie*, obtained from the Department of Elder Affairs, indicates the *five* counties within PSA 9 have approximately 753,768 residents aged 60 and older representing 33 percent of the PSA's total population and 11.5 percent of the State of Florida's sixty and older population. We anticipate over the next 10 years, a considerable number of residents will become elders as a result of net migration and the cohort of "baby boomers" continuing to age into retirement. It is estimated between 2020 and 2030, the number of Floridians 60 and older is expected to rise by 34%. By 2030, individuals aged 65 and older will outnumber those under 18. From 2030 to 2040 the 60+ population in Florida is expected to increase by another 10.1% to 8,303,879. The 60+ population in Florida is anticipated to increase to 9,001,555 by 2050.

In addition to the number and percent of elders projected to increase in the coming years, people are also living longer. An expected consequence is the continued rise in the need for long-term care services. Programs must be well managed to avoid the unwanted results of depleted personal savings, strained government entitlement programs and unrealistic expectations of providers and caregivers. The data from the 2025-2029 Florida State Plan on Aging report of Assessing the Needs of Elder Floridians indicates 24% of Florida seniors 60+ live alone; among those 60+ served by DOEAS services 39% live alone.

Along with these rising trends, there are challenges in addressing the increasing size of the 60 and older population. It is reasonable to expect as these individuals age in place and begin to cope with infirmities of old age, their reliance on a caregiver to help with their activities of daily living will also grow. In 2021, approximately one in three adults aged 60+ provides care to another elder, with another 73,947 grandparents raising their grandchildren. According to an AARP and National Alliance for Caregiving Report, 54% of family caregivers, adults 18+, received unpaid help, 29% received paid help, and 36% has no other help.

Queries of the Enterprise Client Information & Registration Tracking System (eCIRTS) on services most often provided under the Community Care for the Elderly program indicate the need to support functionally impaired elders with ongoing assistance and caregiving whether provided through formal or informal means.

The services most often provided in Planning and Service Area 9 to frail consumers under this program are:

- Case Management / Case Aide
- Personal Care
- Adult Day Care or Adult Day Health Care
- Homemaker
- Companionship
- Respite (In-home and Facility Based)
- Specialized Medical Equipment, Services and Supplies
- Home Delivered Meals
- Emergency Alert Response
- Chore

The gap between people served and people awaiting services, as well as the disparity between client needs and depth of services actually provided, poses a serious concern for thought and action. As the contracting agency for development, coordination and administration of the Community Care for the Elderly Program in Planning and Service Area 9, the *Area Agency on Aging of Palm Beach/Treasure Coast, Inc.* intends to address these concerns through issuance of this RFP, which seeks innovative approaches to service delivery and program management, while emphasizing improved quality and customer satisfaction, all at a reasonable cost.

3. Statement of Purpose

The purpose of this RFP is to solicit applications from qualified agencies / organizations interested in providing case management, required, and other contracted service(s) coordination, and other functions required by law for a Community Care for the Elderly Lead Agency. The purpose of this RFP is for the Area Agency on Aging to select one Lead Agency for each Community Care Service Area (CCSA) in Planning and Service Area 9. The Community Care Service Areas are:

- Indian River County
- Martin County
- Okeechobee County
- St. Lucie County
- Palm Beach County Area A (Service Area is described below)
(North of Hypoluxo Road and Glades/West County)
33460 33461 33462 33405 33406 33413 33415 33480 33409 33417 33401
33407 33403 33404 33408 33410 33477 33458 33469 33463 33411 33414
33418 33412 33478 33470 33467 33438 33476 33430 33493 33449
33440
- Palm Beach County Area B (Service Area is described below)
(South of Hypoluxo Road)
33435 33436 33444 33445 33486 33487 33431 33432 33483 33426 33437
33484 33446 33496 33498 33434 33428 33433 33472 33473 33067

A separate proposal must be submitted for each Community Care Service Area the applicant intends to bid on.

By submitting a proposal, the applicant accepts all of the terms and conditions contained in this RFP.

The purpose of a designated Lead Agency is to provide case management to all Community Care for the Elderly (CCE), Home Care for the Elderly (HCE) and Alzheimer's Disease Initiative (ADI) clients and ensure service integration and coordination of service providers within the CCSA.

The responsibilities of a designated Lead Agency are to:

- a. Ensure all other funding sources available have been exhausted before using CCE, HCE and / or ADI funds.
- b. Establish coordination with all community-based health and social services for functionally impaired older persons funded wholly, or in part, by federal, state and local funds to provide a continuum of care.
- c. Deliver directly, or through subcontracts, required and other necessary contracted services.
- d. Provide case management to applicants and ongoing recipients of required and other contracted services.
- e. Assess and collect co-payments for required and other contracted services.
- f. Train and use volunteers to the fullest extent possible to provide services to clients and assist with other Lead Agency activities.
- g. Compile accurate reports.
- h. Monitor subcontract / vendor agreements to ensure quality services and efficient use of funds. Make payments to subcontractors for required and other contracted services.
- i. Initiate and maintain coordination among agencies.
- j. Arrange in-service training for staff, volunteers, required service subcontractors, and other contracted service providers, in compliance with the Department of Elder Affairs Programs and Services Handbook.
- k. Accept voluntary contributions, gifts and grants to carry out a community care service system.
- l. Demonstrate innovative approaches to program management, staff training and service delivery that impact cost avoidance, cost-effectiveness and program efficiency.
- m. Establish and follow procedures for handling recipient complaints concerning adverse actions such as service termination, suspension or service reduction.
- n. Conduct client satisfaction surveys to evaluate and improve service delivery.
- o. Implement measurable client outcomes directed at:
 - 1) Maintain clients in the least restrictive settings
 - 2) Target high risk clients
 - 3) Improve quality of life
 - 4) Maintain or improving functional status
- p. Improve operations and accessibility by:

- 1) Assure case management services are available on-call, including evenings, weekends and emergencies for Adult Protective Services (APS) cases.
 - 2) Provide services, other than case management, within 72-hours to APS referrals classified as high risk and in need of services to prevent further harm.
 - 3) Respond to referrals for persons at Imminent Risk of institutional placement.
- q. Ensure the DOEA Enterprise Client Information and Registration Tracking System (eCIRTS) data is timely and accurate.
 - r. Develop and implement complaint procedures and ensure subcontractors develop and implement complaint procedures to process and resolve client dissatisfaction with services.

In addition, the Lead Agency must also ensure that procedures include a process for complaints or grievances involving alleged abuse, neglect, or exploitation to be reported to the Florida Department of Children and Families Adult Protective Services – Abuse Hotline, as required by contract and Florida Statutes. The provider shall notify the Agency immediately but no later than twenty-four (24) hours from the provider's awareness or discovery of conditions that may materially affect the provider's or subcontractors ability to perform the services required to be performed under this Agreement.

In performing these responsibilities, the provider must conform to the regulations and standards in the Department of Elder Affairs Programs and Services Handbook and the Adult Protective Services Referrals Operational Manual. These materials may be amended from time to time, and the provider must adhere to any subsequent amendments.

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

The provider must also conform to the terms and obligations in the Standard Agreements executed with the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

The CCE Lead Agency is a key component of the publicly funded long term care system and its performance has a highly significant impact on the lives of the individuals it serves and the local, regional and statewide fiscal sustainability of the long term care system. It is highly desirable for the Lead Agency designation be conferred only to case management agencies with a proven record of performance under conditions typically found in the everyday course of business of a Lead Agency designated pursuant to Ch. 430, F.S.

Agencies applying to be a CCE Lead Agency under the provisions of Ch. 430, F.S., must have the following qualifications:

- Ability to provide case management services to functionally impaired, elderly persons; coordinating community-based health and social services funded wholly, or in part, by federal, state and local funds to provide a continuum of care.

- Ability to provide in-home services directly, or by managing a community service system of providers through subcontracts.
- Ability to provide emergency services to at-risk individuals, such as elders at imminent risk of abuse or institutionalization.
- Ability to monitor subcontracts / vendors to ensure high quality services and efficient use of funds.
- Ability to coordinate service delivery using multiple funding sources and subcontractors / vendors.
- Ability to financially match CCE contract dollars at the rate of \$1 dollar of matching funds for every \$10 dollars of state appropriated CCE funding (10%).

The review panel will evaluate how well the resources and experience described in each applicant's proposal qualifies the applicant to provide services required by the provisions of this RFP. Consideration will be given to the length of time and extent to which the applicant has provided services similar or identical to those requested. The applicant's personnel resources, as well as computer, financial and other technological resources will be considered in evaluating the applicant's qualifications to meet the requirements of this RFP.

To comply with the DOEA Programs and Services Handbook, the designated Lead Agencies will be expected to:

Promote Quality Services by Assuring:

- Case managers develop care plans to meet the individual needs of consumers.
- Case managers act as consumer advocates by seeking services from all community resources, not just from traditional service providers.
- Case managers monitor the quality, appropriateness and cost of services delivered to consumers.
- All staff are appropriately trained and assigned.

Implement Measurable Consumer Outcomes to:

- Maintain consumers in the least restrictive setting.
- Target high-risk consumers.
- Improve quality of life.
- Improve or maintain functional status.

Improve Operations and Accessibility:

- Assure case management services are available on call, including evenings, weekends, and emergencies.
- Provide needed assessment and services within 72 hours to Adult Protective Services referrals classified as high risk and in need of services to prevent further harm, pursuant to Chapter 415, Florida Statutes.
- Serve targeted groups as established in the State Plan on Aging.

Ensure Maximum Efficiency:

- Minimize administrative costs.

- Increase funds available for required and other contracted services.
- Actively seek all community resources available for client services.
- Clearly identify in the client care plan, funding alternatives used prior to using Community Care for the Elderly funds.
- Seek competitive bids or negotiate vendor agreements for provision of quality, cost-competitive services not directly provided by the designated Lead Agency.
- Thorough and timely billing and collection of all co-payments.

All Community Care for the Elderly, Home Care for the Elderly, and Alzheimer's Disease Initiative funds are placed under competitive procurement. Organizations currently holding a Lead Agency designation are not exempt from this Request for Proposal process and must submit a responsive proposal if they wish to be considered for continued designation.

SECTION B - RFP SPECIFICATIONS

MINIMUM REQUIREMENTS TO BE MET

1. Program Requirements:

a. Service Delivery Methodology

1) Program Coordination

The *Area Agency on Aging of Palm Beach/Treasure Coast, Inc.* is designated as an Aging and Disability Resource Center, hereinafter referred to as the “ADRC”, under the provisions of Section 430.2053, Florida Statutes. The primary functions of an ADRC are to facilitate consumer friendly access to long term-care services and benefits for elders and caregivers through a coordinated, multi-access “one stop” system that integrates information, referral and eligibility determination functions.

The ADRC functions are supported by designated Access Points. Lead Agencies are one type of ADRC Access Point. An Access Point operates as a local point of contact for elders and caregivers seeking to access long term-care services and benefits.

An Access Point agrees to:

- Refer to the ADRC all individuals seeking long-term care services and benefits, including, but not limited to information, referral, intake, screening and eligibility determinations.
- Implement referral protocols and procedures established by the ADRC.
- Provide the ADRC with the most current information on elder resources available in the contractor’s county or local community.

As the ADRC, the Agency agrees to:

- Provide timely and helpful long-term care options to elders and caregivers referred by the Access Point.
- Provide the Access Point with written policies and procedures concerning the Access Point referral process.
- Provide technical assistance and training for Access Point staff, as needed.

The ADRC and Access Point mutually agree to:

- Cooperate on efforts to enhance consumer choice, support informed decision-making, minimize service fragmentation and confusion, reduce duplication of administrative paperwork and procedures, and increase cost-effectiveness of long-term care support and delivery systems.
- Participate in public education programs to increase awareness of ADRC services.

Additional coordination and program management responsibilities of the Lead Agency are listed throughout Section B of this document.

2) Case Management and Contracted Services

Respondents to this RFP are required to submit a proposal detailing the cost for case management services and CCE, HCE, and ADI contracted services. Case Management must be provided directly by a Lead Agency and by that agency only. Case aides support case management and must be reflected as a separate service under case management. CCE, HCE, and ADI contracted services may be offered directly by each Lead Agency, or through qualified provider agencies under subcontract with each Lead Agency. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. reserves the right to review and approve all subcontracted entities and reimbursement rates for contracted services.

CCSA-specific funding for CCE, HCE and ADI services under this RFP is included in Section B.2.c. Additional information on required and optional services to be coordinated by the Lead Agency is included in Section B.1.d. of this RFP.

3) Community Care Service System

The Lead Agency designation is contingent upon the bidder's ability to accept referrals and provide case management and coordination of contracted services CCSA-wide for all eligible consumers residing in the specific CCSA being bid. Interested bidders must demonstrate the ability to accept referrals and provide case management services and contracted services coordination CCSA-wide.

b. Lead Agency Requirements

1) Coordination

Bidders must have two years of case management experience for a program of similar size and scope; see Appendix Va, paragraph II.A.1.b.

Lead Agency case managers will coordinate all community resources for functionally impaired elderly people in a community care service system, which is designed to provide a continuum of care as the consumers' needs change. This includes administering and managing the Community Care for the Elderly (CCE) program, the Home Care for the Elderly (HCE) program, and the Alzheimer's Disease Initiative (ADI) program for the Community Care Service Area. Each program is funded separately and carries distinct program responsibilities. Alternative funding (City, County, Local, etc.) must be used to fund client services prior to using the DOEA/Area Agency contracted funds.

The goal of the HCE Program is to encourage provision of care for elders in family-type living arrangements or private homes as an alternative to nursing home or other institutional care. The program encourages a person or group, acting as caregiver(s), to provide basic support, maintenance and assistance in arranging specialized services for three or fewer elders, on a not-for-profit basis.

The Alzheimer's Disease Initiative provides respite and other services, as well as model day care and research information, to individuals with Alzheimer's Disease and other related organic brain disorders. Case managers must coordinate training and referrals with the regional Memory Disorder Clinic.

Priority Groups have been established for receipt of CCE services, and are as follows in order of highest priority:

- a) CCE emergency services are specifically provided within 72-hours for alleged or actual victims of abuse, neglect or exploitation. Services must be carefully coordinated by the CCE Lead Agency with the Adult Protective Services case worker / investigator and service provider agencies. Actual or alleged victims of abuse, neglect or exploitation, or those at risk for same, are afforded the highest priority access to CCE services.
- b) Referrals for consumers deemed at imminent risk of nursing home placement because their mental or physical health condition has deteriorated to the degree that self-care is not possible, there is no caregiver, and nursing home placement is likely within a month or very likely within 3 months shall receive the next highest priority for CCE services.

Detailed information on services, program requirements and case management coordination is contained in the Department of Elder Affairs Programs and Services Handbook.

Chapter 2 of the DOEA Handbook contains information on all aspects of Case Management, including case manager qualifications, job description inclusion requirements, duties and responsibilities, etc. Respondents to this RFP must agree to comply with these requirements; Chapters 9,10 and 11 provide detailed descriptions of the CCE, ADI and HCE Program Administration, respectively; Appendix B contains Co-Pay standards; and Appendix D contains Grievance standards.

2) Confidentiality

Information about functionally impaired elderly people who receive services under the Community Care for the Elderly, Home Care for the Elderly, Alzheimer's Disease Initiative and Emergency Home Energy Assistance programs is confidential (s. 430.207, F.S.). Information received through files,

reports, inspections, or otherwise by the Department of Elder Affairs or departmental employees, by people who volunteer services, or by persons who provide services through contracts with the Department, Area Agency on Aging, Lead Agencies or other contracting agencies, is confidential and exempt from the provisions of Section 119.07(1), F.S. Such information may not be disclosed publicly in a manner to identify a functionally impaired elderly person, unless that person or their legal guardian provides written consent.

The Lead Agency must ensure confidentiality of consumer information by all employees, service providers and volunteers as required by state laws. It is essential training be established to promote security of information, including protection from loss, damage, defacement or unauthorized access.

The designated Lead Agency must comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) of 1996. The Department of Elder Affairs, Area Agency and Lead Agency maintain a "Covered Entity" and "Business Associate" relationship under the terms of HIPAA. As such, the Lead Agency agrees to the terms included in Paragraphs 19 and 20 in the CCE, HCE, and ADI Standard Agreements. (Appendix I).

The Lead Agency must also comply with all requirements of the Social Security number confidentiality and security measures as required by Section 119.071(5), F.S. Whenever possible, please submit reports which include client identifying information to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. using encrypted transmission and the assigned client eCIRTS id in lieu of the individual's social security number.

3) Consumer Identification

a) Outreach

The Lead Agency is responsible for outreach to identify and inform frail elders and their caregivers of the range and availability of services. This may be done in cooperation with church, civic, social and medical organizations. The target audience is those individuals most likely to fall into the high-need category, which is priority levels 4 and 5 when assessed. Lead Agency staff should participate in local networks and consortiums where hospital, home health, social and medical providers, and Memory Disorder Clinics are represented as these are often referral sources for high-need individuals.

b) Intake

The intake process begins when an individual or caregiver seeking assistance contacts the ADRC or other access point. The ADRC performs the intake and screening service functions using the DOEA 701-S form. Service provider agencies seeking assistance on behalf of an elderly person may make referrals to the ADRC.

During intake, essential information is gathered about the person's physical, mental and functional abilities; concerns, limitations, problems, and general background is also obtained to assist in eligibility screening for appropriate service referrals.

If during preliminary intake, the elderly person appears eligible for services from CCE, HCE and / or ADI, the intake worker shall explain a more thorough discussion of the person's situation and service needs, called a screening, is required to ensure program eligibility requirements are met.

If a person does not meet eligibility requirements for any program administered by the ADRC, the ADRC shall explain the eligibility criteria and reason for determination. Referral to other community-based service agencies should be made, if appropriate. The referral and determination of ineligibility shall be properly documented and filed as part of the service record. Individuals determined ineligible for CCE, HCE or ADI services shall be informed of their right to appeal per established grievance and appeal policies and procedures.

c) Initial Screening

The screening process begins with determining the urgency of a person's need, and type of assistance required. The purpose of the 701-S Telephonic Screening is to assess severity of the person's situation and place them on the Assessed Prioritized Consumer List (APCL) also known as the pre-enrollment list. The 701-S Telephonic Screening does not take the place of the 701B Comprehensive In-home Assessment, which is required before care plan development and delivery of required service(s). The 701B Comprehensive Assessment is completed by the Lead Agency once the client is released from the APCL. The initial 701-S screening is handled through the ADRC by staff who have received their certification on Uniform Client Assessment Training per the DOEA Programs and Services Handbook requirement.

The Prioritization Assessment Instrument DOEA Form 701-S is used to collect common information about applicants applying for services funded by the Department of Elder Affairs. Other items related to this process are:

- It is also used to prioritize persons so those in greatest need, and with the

- least assistance available receive services first.
- It is completed over the phone or in person.
- The client must be contacted within three business days after receiving a referral to complete a Prioritization Assessment Form (DOEA Form 701S).
- If an applicant can be served, and is authorized by the ADRC for enrollment, the 701B Comprehensive Assessment must be completed within 14 business days after receiving authorization to enroll.

d) Eligibility Determination

All clients served by the CCE program must be functionally impaired. As defined under Section 430.203(7), F.S., and Rule 58C-1.002, Florida Administrative Code, functionally impaired elderly person, means any person 60 years of age or older, having physical or mental limitations that restrict the individual ability to perform the normal activities of daily living and that impede the capacity to live independently without the provision of required services.

Functional impairment shall be as determined by an initial comprehensive assessment and at least an annual reassessment using the 701B form.

Final determination of eligibility is the responsibility of the CCE Lead Agency. A potential consumer will be determined eligible only after a 701B Comprehensive Assessment is completed to establish age, need and risk of institutional placement without services.

e) Prioritization

Individuals seeking services may enter the community care service system by direct contact with an access point which results in a referral to the ADRC.

The 701B Comprehensive Assessment (Form 701B) developed by the Department of Elder Affairs must be used by the CCE Lead Agency case manager to determine an individual's level of need. Scores obtained using the Assessment will provide a priority ranking score to help determine the need for services.

Those people suspected to be victims of abuse, neglect or exploitation are referred by the Department of Children and Families Adult Protective Services (APS) Unit, and shall be given primary consideration over all others to receive Community Care for the Elderly Services.

f) Referral

Services not available through the agencies under subcontract or vendor agreement with a CCE Lead Agency should be obtained and / or arranged

through referrals to other community resources. Referrals should be made to volunteer agencies, informal networks and proprietary agencies that charge fees a consumer may be able to pay. Services provided under the CCE, HCE, and ADI programs should be considered as a 'last resort' to meet the needs of any given consumer.

The CCE Lead Agency case manager must conduct follow-up contacts on referrals within fourteen days to ensure services have begun as authorized.

g) Enrollment Management

The Assessed Prioritized Consumer List (APCL), also known as the pre-enrollment list, must be maintained when formal services funded by CCE, HCE and / or ADI are not available. Following the screening and assessment process, the client is placed on the APCL, informed about the enrollment management process and provided alternative sources for assistance that may be available. Further information on APCL or pre-enrollment list requirements can be found in the DOEA Programs and Services Handbook, Chapter 2.

4) Comprehensive Assessment of Eligible Consumers

The case manager is responsible for completing the DOEA 701B Comprehensive Assessment, Form 701B. The assessment determines the person's functional status, existing resources and service needs. Further information on DOEA Form 701B requirements can be found in the DOEA Programs and Services Handbook.

a) Determination of Functional Status

A consumer's functional status is determined by the scores received on the Activities of Daily Living (ADL) and the Instrumental Activities of Daily Living (IADL) sections of the DOEA 701B Comprehensive Assessment instrument.

b) Establishing Service Needs

The result of the comprehensive assessment process is establishment of a consumer care plan, which must thoroughly address all service needs of the functionally impaired elderly person.

5) Provision of Services to Adult Protective Services (APS) Referrals

The Department of Elder Affairs and Department of Children and Families (DCF) signed a memorandum of agreement to ensure delivery of timely services to vulnerable elders in need of services or victims of abuse, neglect, or exploitation. The agreement calls for development of joint local written procedures through a Memorandum of Understanding for serving adult protective services referrals.

Every Area Agency, DCF region and Lead Agency is responsible for jointly creating and signing a Memorandum of Understanding to define:

- The APS referral process
- Method to track referrals in eCIRTS and APS Referral Tracking Tool (ARTT)
- Service delivery guidelines according to “APS Referrals Operations Manual”

The Lead Agency shall ensure, pursuant to Section 430.205(5), F.S., those elderly persons determined by adult protective services (APS) to be victims of abuse, neglect, or exploitation, and who are in need of immediate services to prevent further harm and are referred by APS as “high risk”, will be given primary consideration to receive CCE services.

Case coordination by a Lead Agency case manager must be available 24 hours per day, seven days a week for elderly victims of abuse, neglect or exploitation who are referred by an APS investigator. Emergency services may be provided, or continued, for up to 31 days for APS referrals by contracted emergency services providers. A DOEA Form 701B Comprehensive Assessment must be conducted within 72 hours to determine eligibility for ongoing CCE services. According to the Ch. 430, F.S., those elderly persons determined through the use of the functional assessment to be at risk of institutional placement, and any victim of abuse, neglect or exploitation shall be given top priority to receive CCE services.

Lead Agency case managers must immediately report to 1-800-96-Abuse Registry any situation where any elderly person is the suspected or actual victim of abuse, neglect, or exploitation.

Lead Agency case managers must coordinate closely with APS workers, investigators and / or case workers to:

- Assure immediate need for services is met within 72 hours of an initial high-risk referral from the APS worker.
- Share client or case specific information to assure the best and most expeditious care for the person and eliminate or reduce factors placing the person at risk of abuse, neglect or exploitation.
- Until released by APS, the Lead Agency must coordinate case management with APS, and may bill for Case Management units.
- Adhere stringently to the guidelines in the DCF APS Referrals Operations Manual and DOEA Programs and Services Handbook.

6) Service Care Plan

Lead Agency case managers must prepare a care plan for each eligible consumer using the format prescribed by the DOEA Programs and Services Handbook, Chapter 2.

The care plan is developed in coordination with the consumer and / or caregiver and must address all consumer needs. It is the responsibility of the case manager to consider the most appropriate resources to provide the services needed, as indicated in the care plan.

Consumers or caregivers may accept or decline services or providers of services. Consumer choice should be the primary consideration when there is more than one subcontractor available for a given service.

Case managers must manage consumer care plans by arranging for the services accepted, and monitoring the quality of service delivered to their clients. Periodic review of continued appropriateness of the care plan should occur at least twice annually. Specific care plan requirements for each Program are prescribed in the DOEA Programs and Services Handbook, Chapter 2.

All consumers must be reassessed at least annually, and care plans must reflect changing or ongoing consumer needs.

7) Resource Management and Development

Funds appropriated by the Florida Legislature for Community Care for the Elderly, Home Care for the Elderly, and Alzheimer's Disease Initiative must be used only to provide CCE, HCE, and ADI services, respectively and case management and directly related expenditures. The Lead Agency must ensure all other funding sources available have been exhausted before using CCE, HCE or ADI funds. Additionally, the designated Lead Agency must prepare CCE, ADI and HCE surplus/deficit/encumbrance analysis reports and forward the reports to the Area Agency on Aging monthly.

To provide an effective continuum of care, the Lead Agency must ensure coordination with all community-based health and social services programs for functionally impaired older persons funded wholly or in part by federal, state and local funds. Voluntary contributions, gifts and grants must be encouraged and used to expand CCE services to support a comprehensive service array.

Collecting co-payments from clients is an important responsibility for providers of Community Care for the Elderly (CCE) and Alzheimer's Disease Initiative (ADI) services. State General Revenue resources to support services for the elderly cannot meet the growing needs. Therefore, every eligible client must be given an opportunity to participate in the co-pay for services program. It is critical case managers assess potential clients for their ability to participate in the cost of their care.

It is equally important to identify potential Medicaid-eligible clients and refer them to the ADRC for assistance in obtaining their Medicaid benefits through the Department of Children and Families, and potential eligibility and enrollment in

the Statewide Medicaid Managed Care Long-Term Care Program. State General Revenue resources should not be used for clients who meet Medicaid functional impairment criteria and who are Medicaid eligible.

The ADRC provides long-term care options counseling. ADRC Helpline staff conduct long-term care options counseling to assist clients in determining the best and most appropriate selection of services and programs.

For Medicaid-eligible consumers, the ADRC coordinates eligibility determination for publicly funded program services. When it is determined a client may be eligible for Medicaid funded programs, ADRC staff assist with eligibility determinations through coordination with CARES and DCF staff.

8) Quality Assurance

To assure effective and efficient client care through delivery of quality services, Lead Agencies must participate in pre-service and in-service training developed according to standards and requirements specified in rules and the DOEA Programs and Services Handbook.

The Lead Agency will self-monitor and self-evaluate the quality of service delivery by its own staff. Additionally, the Area Agency on Aging will conduct independent quality assurance monitoring and performance evaluations of all CCE Lead Agencies.

The degree of client satisfaction with service quality and staff effectiveness must be evaluated periodically during the contract period. A consumer survey must be conducted, compiled and results evaluated and reported to the Area Agency on Aging at least annually. Survey results are expected to be analyzed by the Lead Agency and used to develop continuous quality assurance initiatives to ensure improvements to service delivery.

9) Co-Payment

The Lead Agency providers are responsible for collecting fees for services in accordance with rules adopted by the Department of Elder Affairs for the CCE (s. 430.204(8), F.S., and Rule 58C-1.007, F.A.C.) and ADI programs (s. 430.503, F.S.).

Provider agencies shall assess fees for services rendered according to those rules.

To help pay for services, a functionally impaired elderly person shall be assessed a fee based on an overall ability to pay. The fee assessed shall be fixed according to an established DOEA schedule. Co-pay Guidelines and any policy memoranda on this subject issued subsequently by the Department are included in the DOEA Programs and Services Handbook.

The Lead Agency is responsible for timely billing and collecting assessed co-payments for all services provided under the CCE and ADI programs. This includes coordinating with other service provider agencies with whom CCE and ADI consumers are shared. The collected funds must be retained in an interest-bearing account and reported to the Area Agency on Aging monthly. All collected co-payment funds must be used to expand consumer services under the CCE and ADI programs and may be used to count toward the 10% contract match requirement.

10) Disaster Preparedness and Emergency Related Service Provision

The Lead Agency is required to enter disaster preparedness data into eCIRTS for all consumers. In addition to basic identification, location, emergency contact and handicap information, this data includes fields to indicate if a consumer needs help for emergency evacuation, and if they need a specially equipped shelter and special disaster registry listing. The Lead Agency must be prepared to use eCIRTS reports to routinely provide registry information to the local emergency management team and identify, locate and assist with evacuation and other needs of endangered elderly in the event of disaster, as directed by the Department of Elder Affairs.

To prepare for an emergency / disaster event, the Lead Agency will cooperate, coordinate and train with the local emergency management agency to the fullest extent possible. The Lead Agency must maintain a current DOEA Disaster Plan to be implemented, at the direction of DOEA, in the event a disaster is declared by federal, state or local officials. Key elements shall include the following:

- Designation of a Disaster Coordinator and alternate.
- Plans to ensure continuity of operations and services following a disaster.
- Plans for contacting all at-risk consumers, on a priority basis, prior to and immediately following a disaster.
- Plans for collecting and communicating information to the AAA on disaster response such as services delivered and unmet needs.
- Plans to receive referrals, conduct outreach, and deliver services, before and after a disaster, to elderly persons who may or may not be current consumers.
- Plans to help at-risk consumers register with the Special Needs Registry of the local emergency management agency.
- Plans to deliver meals to consumers prior to and following a disaster.

11) Social Security Number Disclosure

In accordance with Title XIX of the Social Security Act, the client must be informed disclosure of their SSN is voluntary and will be used for referral and screening for Medicaid purposes. The client is not required to provide the SSN,

but is encouraged to do so for staff to screen for Medicaid eligibility and referral to the Department of Children and Families or ADRC for potential services.

12)Consumer Grievance and Appeals Procedures

The Lead Agency must develop and maintain procedures to provide for handling consumer complaints and process appeals regarding denial, reduction or termination of services. These procedures must provide for informing all consumers of the grievance and appeal process, including prior written notification to the consumer of activities related to the grievance / appeal and providing assistance to consumers desiring to file a grievance / appeal. Information concerning consumer grievance and appeals procedures can be found in the CCE, HCE and ADI Standard Agreements, and the DOEA Programs and Services Handbook.

13)Personnel Standards and Employee Benefits

Personnel policies incorporated into agency operating procedures must be developed to address at a minimum, the following:

- Employee recruitment and hiring
- Lines of authority and supervision
- Working schedules and hours of operation
- Employee compensation
- Employee fringe benefits
- Employee evaluation and promotion
- Leave
- Confidentiality and privacy
- Employee discipline and termination
- Employee grievance procedures
- Accidents, safety, and unusual incidents
- Travel and transportation policies
- Employee conduct
- Employee pre-and in-service training and staff development
- Assurance of agency compliance with all applicable federal and state laws and regulations

Job descriptions must be established for each funded and any associated unpaid position. Job descriptions for funded positions must include salary ranges and must be submitted as part of this proposal. In addition, the minimum education, training, experience and qualifications necessary for each position must be included.

A salary range for each paid position must be established by the governing body of the Lead Agency.

14) Organization Chart

An organizational chart for staffing the three programs related to this RFP (including existing and proposed positions) which illustrates the structure and relationship of positions, units, supervision and functions must be developed and submitted by the bidder as part of the proposal response.

15) Reporting

The Lead Agency is required to compile Community Care for the Elderly (CCE), Alzheimer's Disease Initiative (ADI), and Home Care for the Elderly (HCE) service delivery statistics and other data and report to the Area Agency on Aging and Department of Elder Affairs according to reporting requirements developed by the Department.

The Area Agency on Aging monthly reporting requirements for the provider shall ensure timely input of program-specific data into eCIRTS. To ensure eCIRTS data accuracy, the Provider shall use eCIRTS-generated reports which include the following:

- Client Reports;
- Monitoring Reports;
- Services Reports;
- Miscellaneous Reports;
- Fiscal Reports;
- Aging and Disability Resource Center Reports; and
- Outcome Measurement Reports.

To ensure eCIRTS data integrity, the following timeframes are required for entering data into eCIRTS:

- eCIRTS Enrollment Screen reflects ACTV – Within 10 business days
- eCIRTS Enrollment Screen reflects appropriate termination code no later than 30 calendar days after services ceased
- Assessments – Within calendar 30 days of Assessment Date
- Care Plans – Within 30 calendar days of Care Plan Date

Case management, case aide and any CCE, HCE or ADI service provided by the Lead Agency must be reported monthly in eCIRTS by the Lead Agency.

eCIRTS data for services received must be entered into eCIRTS by the 10th day of the month subsequent to the month in which the services were delivered.

All requests for payment reporting requirements must be submitted within the timeframe established by the Area Agency on Aging. Other required reports are identified in the CCE, HCE, and ADI Standard Agreements (Appendix I).

The provider shall ensure an appropriate level of data security for the information the provider is collecting or using in the performance of this Agreement. An appropriate level of security includes approving and tracking all provider employees that request system or information access and ensuring that user access has been removed from all terminated employees. The provider, among other requirements, must anticipate and prepare for the loss of information processing capabilities. All data and software shall be routinely backed up to ensure recovery from losses or outages of the computer system. The security over the backed-up data is to be as stringent as the protection required of the primary systems. The provider shall ensure all subcontractors maintain written procedures for computer system backup and recovery. The provider shall complete and sign the Certification Regarding Data Integrity Compliance for Agreements, Grants, Loans, and Cooperative Agreements and return it with the Agreement to the Agency contact.

Electronic client records and files must be stored in an encrypted format at all times. Storage devices include, but not limited to, computer servers, mobile devices such as laptops, notebooks, and phones, removable media such as CD's, jump drives, DVD's and tape. Access shall be limited to staff members requiring the information in order to provide a service to the client.

In addition to proper storage, security and preservation of source documentation, eCIRTS data must also be protected. Maintenance will include valid backup and retention of electronic data on a regular basis.

16) Staffing and Facility Requirements

Each Lead Agency's Governing Board must designate a local representative or employee with legal authority to act on behalf of the agency and / or the CCE program. This individual must devote sufficient time to ensure the CCE, HCE AND ADI programs are administered and managed per DOEA requirements.

All CCE, HCE, and ADI services (including case management) must be delivered by qualified staff according to service standards included in the DOEA Programs and Services Handbook. The number of staff employed must follow the DOEA Program and Services Handbook and be sufficient to ensure timely service delivery to all Lead Agency consumers.

All CCE Lead Agencies must be open and accessible to the public a minimum of

40 hours per week, Monday through Friday between the hours of 8:00 AM and 5:00 PM. During all other hours, telephone coverage via answering service must be provided. The office should be reasonably accessible to persons seeking assistance and / or information; it is preferable the Lead Agency be centrally located within the Community Care Service Area and be handicap accessible.

Lead Agencies must demonstrate they have sufficient resources, in terms of both trained staff and equipment, to complete timely eCIRTS data entry, data management requirements and access to electronic mail from the Department of Elder Affairs and Area Agency on Aging.

A successful bidder for Lead Agency designation must be prepared to assume program responsibilities and service provision at 12:01 AM on the first day covered by the contract period, without interruption to existing consumers. Additionally, case coordination by a Lead Agency case manager must be available 24 hours per day / seven days per week for elderly victims of abuse, neglect or exploitation who are referred by an APS investigator.

17) Training

All staff providing services require a general pre-service orientation and training specific to the service being provided. Lead Agencies shall be responsible for provision of the pre-service and in-service training for all paid and volunteer staff as referenced in the DOEA Programs and Services Handbook.

Each provider agency shall describe and allocate funds for training in the provider application included in this RFP. It is also essential that Lead Agencies meet with contracted service providers to establish necessary protocol and procedures for authorization of services, paperwork and reporting unusual incident reports and general expectations for coordination. Service Providers must recognize case managers are the gatekeepers and have responsibility for coordinating and authorizing service to clients.

All DOEA services require a general pre-service orientation along with training specific to the service being provided. Lead Agencies shall be responsible for provision of the pre-service and in-service training for all paid and volunteer staff.

In-service training hours and topics shall include, at a minimum, the following topics and others as updated in the DOEA Programs and Services Handbook:

Overview: Overview of community care services;

Relationship: Relationship of case management to the community care services system;

Completion of Forms: Use and completion of assessment instruments and care plans;

Interviewing: Interviewing skills and techniques;

Record Keeping: Record-keeping procedures;
eCIRTS: Enterprise Client Information and Registration Tracking System (eCIRTS) procedures;
Aging Network Overview: Overview of the aging network (AAA, DCF, AHCA, DOEA and other agencies) and the agency's relationship to the community care service system;
Caregiver Training: Caregiver training regarding responsibilities and resource development techniques;
Coordination Training: Interagency coordination and informal network development training; and
Adult Protective Services (APS) Training: Training on the Abuse Registry Tracking Tool (ARTT) and the APS Referrals Operations Manual.

Case managers must successfully complete on-line training on the 701B Comprehensive Assessment and pass the certification test as well as attend Care Plan and APS training and receive an acceptable score on the post-test provided by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. staff. Additionally, they must have six hours of in-service training per year and document the duration and content in case management staff records.

Topics such as Alzheimer's Disease, Cultural Sensitivity, Caregivers Needs, Dealing with Difficult Clients, Mental Health and the Elderly, and continuing Handbook and Policy Reviews are appropriate. Attendance at the Area Agency on Aging or Department of Elder Affairs sponsored training is required.

Required training will include, but not be limited to, the intake and screening assessment instruments, care plan development and costing and training on the Abuse Registry Tracking Tool (ARTT) and the APS Referrals Operations Manual. It is essential Lead Agencies meet with CCE, HCE and ADI subcontractors to establish necessary protocol and procedures for authorization of services, paperwork and reporting, unusual incident reports and general expectations for service coordination. Service provider agencies must recognize a case manager's responsibility for coordinating and authorizing services.

18) Volunteers

Pursuant to section 430.204(3), Florida Statutes, concerning the Community Care for the Elderly Program, "The use of volunteers shall be maximized to provide a range of services for the functionally impaired elderly person. The department shall provide or arrange for the provision of training and supervision of volunteers to ensure the delivery of quality services. The department or contracting agency may provide appropriate insurance coverage to protect volunteers from personal liability while acting within the scope of their volunteer assignments under a community care service area. The coverage may also include excess automobile liability protection."

Bidders must provide assurance and demonstrate staffing capability to train and

supervise volunteer staff and volunteer supervisors. All bidders must submit a written plan to address recruitment, training, utilization and retention of volunteers to assist the CCE Lead Agency.

Reporting on the number of volunteers and volunteer hours must be submitted to the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. by the 10th of the month following the end of the calendar year.

Lead Agencies may use CCE funds and staff for securing, training and using volunteers. CCE funds may also be used to provide insurance and personal liability coverage, excess automobile liability protection and automobile mileage reimbursement. Per s.112.061(7)(d)1.a., F.S., the current State of Florida approved mileage reimbursement rate is \$0.445 per mile.

c. Coordination of Case Management and Consumers to be Case Managed

Each consumer will be assigned one and only one case manager, even if the consumer is enrolled in more than one program. This means only one case manager will be reimbursed for their services at any given time. Case management providers are strongly encouraged to cost-share case managers across programs to assure consumers receive the appropriate mix of services.

Multiple assessments will not be conducted unless a significant change in consumer status occurs to warrant such action. Providers will check eCIRTS to determine if a current assessment has been completed prior to conducting an assessment and will follow the Agency's Clients in Common Procedure.

When a consumer is enrolled in one or more programs which fund case management, the following applies:

Case Management Funding Source	If Receiving Services Under (Program/s)
Home Care for the Elderly	HCE and any other program, except SMMC LTC
Community Care for the Elderly	CCE and any other program, except SMMC LTC and HCE
Alzheimer's Disease Initiative	ADI – for consumers under 60 years of age

Additional information about each program to be case managed is available in the DOEA Programs and Services Handbook.

The case manager is the gatekeeper in the community care service system with the knowledge and responsibility to link consumers to the most beneficial and least restrictive array of community services and resources, irrespective of funding source or program. Case managers serve as a contact between health care and social

service delivery systems, particularly physicians, hospitals, health maintenance organizations, nursing homes and home health agencies.

Consumer choice is the primary consideration in determining service referrals. In those instances where more than one CCE, HCE or ADI subcontractor is available for a given service, and the consumer expresses no preference, the Lead Agency should make the referral based on geographical and cost efficiency considerations. The procedures and referral formats used are to be developed by the Case Management / Lead Agency.

d. Services to be Coordinated

The following is a list of the services the Lead Agency may provide and must provide either directly or through subcontracts under the CCE, HCE, and ADI programs in each Community Care Service Area. Case Management cannot be subcontracted and must be provided directly by the Lead Agency.

CCE Required Services

- Adult Day Care
- Assurance
- Case Aide
- Case Management
- Chore
- Emergency Alert Response
- Enhanced Chore
- Companionship
- Home Delivered Meals
- Homemaker
- Pest Control (Initiation)
- Pest Control (Enhanced Initiation)
- Pest Control (Rodent)
- Pest Control (Maintenance)
- Personal Care
- Respite (In-Home)
- Specialized Medical Equipment, Services, and Supplies

CCE Optional Services

- Adult Day Health Care
- Caregiver Training/Support
- Counseling (Gerontological)
- Counseling (Mental Health Screening)
- Housing Improvement
- Material Aid

- Other
- Respite (In-Facility)

Legal Assistance is not being considered in this RFP and will be bid out separately.

HCE Required Services

- Basic Subsidy
- Case Aide
- Case Management
- Chore
- Home Delivered Meals
- Homemaker
- Personal Care
- Respite*
- Specialized Medical Equipment, Services and Supplies

*One form of Respite must be provided (either Facility-Based or In-Home). The other manner of Respite service is then optional.

HCE Optional Services

- Adult Day Care
- Assurance
- Housing Improvement
- Pest Control (Initiation)
- Pest Control (Maintenance)

ADI Required Services

- Case Aide
- Case Management
- Homemaker
- Material Aid
- Personal Care
- Respite*
- Specialized Medical Equipment, Services and Supplies

*One form of Respite must be provided (either Facility-Based, In-Home, or In-Facility Specialized Alzheimer's). The other manners of Respite service are then optional.

ADI Optional Services

- Adult Day Care
- Assurance
- Caregiver Training/Support
- Companionship

- Home Delivered Meals
- Education/Training

A complete list of the services funded under all programs managed by the Department of Elder Affairs and descriptions for each may be found in the DOEA Programs and Services Handbook.

CCE, HCE, and ADI required services under this bid are included in Section B.2.c. (Funding Levels). Additionally, CCSA-specific historical service funding levels and unduplicated client information for the 2023-2024, 2024- 2025 and 2025-2026 CCE, HCE and ADI contract periods are included as Appendix XI.

e. Special Conditions

Proposed CCE, HCE and ADI unit rates for all services will not be allowed to exceed the maximum allowable unit rates shown in Appendix XII for Year 1 of the contract year for a contract awarded under this RFP.

Future unit rate increases for CCE, HCE, and ADI services for renewal purposes will be negotiated by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. and the Lead Agency following submission of the Lead Agency's Annual Unit Cost Budget.

f. Strategies and Performance Measures

In keeping with the legislatively mandated requirements for contract performance measures, the DOEA has identified four performance measures. Lead Agencies are required to develop implementation strategies to assist the Department in achieving statewide outcome measures identified for the aging network. Please explain your organization's strategies to ensure the following performance measures are achieved:

- New service recipients' ADL assessment scores have been maintained or improved
- New service recipients' IADL assessment scores have been maintained or improved
- Improving the environment scores for elders with high or moderate risk environments.
- Adult Protective Services (APS) referrals who are in need of immediate services to prevent further harm who are served within 72 hours

The designated Lead Agency must include strategies to address all of the performance measures listed above.

Performance Measures

The performance measures outlined in the format section of this application are the statewide initiatives legislatively mandated for the DOEA. All Lead Agencies are required to describe the strategies they will use to implement and follow to increase the performance percentage for each of these measures.

2. General Information

a. Contact Person

The contact for this Request for Proposal process is:

**Laurie Greco, Compliance and Quality Assurance Manager
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
701 Northpoint Parkway, Suite 115
West Palm Beach, FL 33407
lgreco@aaapbtc.org
561-684-5885 ext. 59216**

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 via email only to the Contact Person and must be submitted by the deadline in the RFP Timeline. A complete copy of all questions submitted by prospective applicants and the Area Agency's responses will be provided by an addendum to this RFP and posted on the Agency website at <https://www.aaapbtc.org/public-notice/> within the timeframe specified in the RFP Timeline.

The Area Agency on Aging of Palm Beach/Treasure Coast may at times experience technical difficulties receiving e-mail correspondence that includes attachments. Accordingly, each applicant is responsible for verifying receipt of its written questions by the Area Agency on Aging of Palm Beach/Treasure Coast prior to the submission deadline. Applicants should contact the Contact Person for the limited purpose of confirming receipt. 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.

Written inquiries will be accepted until October 13, 2026 at 5:00 PM. No written inquiries will be accepted after the 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 above. Violation of this provision may be grounds for rejecting a proposal.

c. Funding Levels

Funding for the Community Care for the Elderly Program, Home Care for the Elderly Program, and Alzheimer’s Disease Initiative is contingent upon an annual appropriation from the Legislature and is therefore subject to reduction or elimination from the state budget. The total current amount of appropriation for the CCE, ADI and HCE contracts subject to bid is \$19,655,902.

Services will be bid on a per–Community Care Service Area (CCSA) basis and each proposal must ensure the respective services will be accessible throughout the entire CCSA. If an applicant chooses to bid on services in more than one CCSA, a separate proposal must be submitted for each CCSA.

The CCSA-specific funding levels and required current unduplicated client count information is noted below. Please note acceptable bids must meet the following funding and unduplicated client count criteria:

- 1) Required services currently funded in each CCSA and identified below must be maintained at levels comparable to those shown in Appendix XI for the 2026-2027 contract period (allowances will be made for changes in total required service funding)
- 2) The CCSA-specific total funding for all CCE, HCE, and ADI services and Case Management must match the “Total CCE, HCE, and ADI Funds” shown below for the specific CCSA being bid
- 3) The total clients initially to be served is shown below for the specific CCSA being bid. Client volumes may fluctuate during the term of the contract

County	ADI	HCE	CCE	Total
Indian River	599,590	252,950	818,210	1,670,750
Martin	543,160	229,140	741,200	1,513,500
Okeechobee	141,080	89,280	192,520	422,880
Palm Beach A	2,892,140	1,190,360	3,898,530	7,981,030
Palm Beach B	1,834,040	773,740	2,502,760	5,110,540
St. Lucie	1,043,990	440,430	1,424,650	2,909,070
Total	\$7,054,000	\$2,975,900	\$9,577,870	\$19,607,770

County	ADI	HCE	CCE	Total
Indian River	30	22	57	109
Martin	43	29	72	144
Okeechobee	21	30	48	99
Palm Beach A	168	212	205	585
Palm Beach B	128	135	167	430
St. Lucie	55	69	104	228
Total	445	497	653	1,595

d. Matching Requirement

Bidders awarded funds through this solicitation process will be required to provide a match for CCE equal to, or greater than, 10% of the total budget presented. The match requirement may be satisfied through a commitment of cash or in-kind resources, or combination. State General Revenue dollars from other contracts or grants may not be used as match. Appropriate matching funds based on the Lead Agency's year-to-date contract achievement levels must be reported monthly.

e. Type of Contract and Method of Payment

Only fixed unit rate contracts will be issued. Bidders awarded funds will be reimbursed monthly for the units of service provided, at the contracted unit rate, up to the total amount of the agreement. The Community Care for the Elderly Lead Agency is expected to manage its budgets such that the Lead Agency is able to provide services to enrolled clients for the entire agreement period without interruption. Lead Agencies shall monitor overall contract expenditure rates during the contract period. Monthly invoices submitted by the Lead Agency are consolidated and submitted to the Department of Elder Affairs for payment. Payments are usually received within 45 to 60 days of submission.

Service and client information must be maintained in the Enterprise Client Information and Registration Tracking System (eCIRTS). Case management and required service units must be entered in eCIRTS monthly for Lead Agencies to be reimbursed.

Bidders awarded funds through this solicitation agree to maintain and provide, upon request, all programmatic, financial, and eCIRTS reports as required in the program and service contracts. Copies of the CCE, HCE, and ADI Standard Agreements are attached to this Request for Proposals document as Appendix I. Failure to abide by these terms and conditions may result in suspension of payment, assessment of financial consequences, and / or termination of the agreement.

The method of payment for awarded agreements under this RFP may include payment advances. Per Florida Statutes, advance payments may be made only to

not-for-profit corporations and governmental agencies.

The Recipient must ensure fixed rates include only those costs in accordance with all applicable state and federal statutes and regulations and are based on audited historical costs in instances where an independent audit is required.

All Requests for Payment will be processed using the Area Agency on Aging of Palm Beach/Treasure Coast email. Additional information on method of payment and the schedule of reporting is included the CCE, HCE, and ADI Standard Agreements in Appendix I.

f. Allowable Costs, Method of Cost Presentation, and Method of Payment

Allowable Costs

All CCE, HCE and ADI program costs must be reasonable and necessary. Lead Agencies must comply with the provisions of the Florida Single Audit Act as contained in section 215.97, Florida Statutes, if applicable.

Method of Cost Presentation

All contract costs and unit rates must be developed using the Unit Cost Methodology formats as described in the SGR Service Provider Application Format and Contract Module Worksheets and Instructions (Appendix Va) and SGR Service Provider Applications Instructions packet (Appendix IV).

Bidders must follow the Unit Cost Methodology closely and provide the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. with information in sufficient detail to allow proposal reviewers to determine the appropriateness and accuracy of all identified costs and rates. The review team must be able to establish through the review of factual information submitted by each bidder that costs are allowable, reasonable and necessary. Budget notes and any additional narrative that will give the review team a clear picture of the allocation methodology followed by the bidder are recommended and bidders are encouraged to make these available.

g. Trade Secrets

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. is unable to assure confidentiality of information fitting the definition of trade secrets pursuant to section 812.081 Florida Statutes. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. assumes no liability for disclosure of or use of unmarked material containing trade secrets or other confidential material and may use or disclose the data for any purpose, and may assume the proposal was not submitted in confidence and therefore is a public record pursuant to Chapter 119, Florida Statutes. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. is not obligated to agree with a proposer's claim of exemption for marked materials and, by submitting a proposal, the proposer agrees to be responsible for defending its claim that each and every portion of marked trade secrets are exempt from inspection and

copying under Florida's Public Records Law. Proposer agrees that it shall protect, defend, and indemnify, including attorney fees and costs, including any appellate costs and attorney fees, the Area Agency on Aging of Palm Beach/Treasure Coast, Inc., its officers, employees, agents, and legal counsel from any and all claims and litigation arising from or relating to proposer's claim that the marked portions of its proposal are confidential, proprietary, trade secret, or otherwise not subject to disclosure.

h. Costs of Preparation of Proposal

Any and all expenses involved in the preparation and submission of proposals in connection with this solicitation process shall be borne by the bidder(s). The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. assumes no liability for any cost incurred by the bidder in responding to this Request for Proposal nor for any other pre-contract costs. Current CCE, HCE, and ADI providers must certify they have not used CCE, HCE and ADI program funds in preparing a response to this RFP by completing Appendix XIII.

i. Proposal Deadlines			
	ACTIVITIES	DATE	TIME (EST)
1.	Request for Proposal advertised and released	September 14, 2026	1:00 PM
2.	RFP documents available on the Area Agency on Aging website https://www.aaapbtc.org/public-notice/	September 14, 2026	1:00 PM
3.	Written Notice of Protest of terms, conditions, or specifications of the RFP due (72 hours after posting of the RFP, excluding weekends and State holidays)	September 17, 2026	1:00 PM
4.	Last day for written inquiries/RFP Questions to be submitted	October 13, 2026	5:00 PM
5.	Response to written inquiries & RFP addenda available on the Area Agency on Aging website	On an ongoing basis with the last response posted by October 27, 2026	5:00 PM
6.	Last day for proposals to be received by: Area Agency on Aging of Palm Beach/Treasure Coast, Inc., 701 Northpoint Parkway, Suite 115, West Palm Beach, FL 33407	November 17, 2026	12:00 PM
7.	Proposals opened and reviewed for fatal criteria	November 17, 2026	1:00 PM
8.	RFP Review Committee recommendations finalized	January 11, 2027	9:00 AM
9.	RFP Review Committee recommendations considered by Board of Directors	January 12, 2027	11:00 AM

10.	CCE Lead Agency Designation Notice of Intent to Award posted on Area Agency on Aging of Palm Beach/Treasure Coast, Inc. website and announced by formal written notice	January 12, 2027	5:00 PM
11.	Written Notice of Protest due (72 hours after posting of intent to award contracts, excluding weekends and State holidays)	January 15, 2027	5:00 PM
12.	Appeals resolved	March 15, 2027	5:00 PM
13.	Announcement of final awards by formal written notice	March 15, 2027	5:01 PM
14.	Contract finalized and mailed	March 24, 2027	5:00 PM
15.	Transition Process Begins: Consumer notifications & file transfers	April 7, 2027	9:00 AM
16.	Transition Process Ends	June 30, 2027	5:00 PM
17.	Program operations begin for new CCE Lead Agencies	July 1, 2027	12:00 AM

All dates and times are subject to change. It is the responsibility of each applicant to check for any changes on the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.'s website: <https://www.aaapbtc.org/public-documents/>

j. Acceptance of Proposal

Proposals addressed to:

Laurie Greco, Compliance and Quality Assurance Manager
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.
701 Northpoint Parkway, Suite 115
West Palm Beach, FL 33407
must be received by 12:00 PM, November 17, 2026.

No changes, modifications or additions to submitted proposals will be accepted after the submission deadline. However, the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. may seek written clarifications from proposers.

Proposals not received at either the specified place or by the specified date and time by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc., or both, will be rejected and returned unopened to the proposer. All times specified in this RFP are based on the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

k. Number of Copies Required and Submission Procedure

Bidders are required to submit an original hard copy plus one additional hard copy of their proposal. The original hard copy must contain, where required, the original

signature of an official of the potential provider agency authorized to bind the provider to the agency's proposal.

Additionally, bidders must submit an electronic copy of their proposal on USB drives. The USB must contain a PDF that is an exact duplicate of the hardcopy and must contain the same labels and specifications. There must be one USB drive labeled Service Provider Application – Program Module. It must contain all the information required in Sections I.A and II.A of the Appendix Va – Service Provider Application Table of Contents. A second USB drive must be labeled Service Provider Application – Contract Module. The second USB drive must contain all the information required in Section II.B of the Appendix Va – Service Provider Application Table of Contents as well as completed copies of Appendices II, III, Vb, VI, X, and XIII.

Copies of proposals along with the USB drives containing the electronic copy must be submitted **in a securely sealed envelope or container**, which must be clearly marked on the outside to read:

Proposal for Lead Agency Designation Submitted by: (name of bidder)
CCSA (Community Care Service Area Being Bid on)

Failure to timely submit all copies of the proposal in strict accordance with this Section constitutes a fatal flaw and will automatically disqualify a proposal from further review and consideration.

NOTE: THERE ARE SIX CONCURRENT RFPS - ONE FOR EACH COMMUNITY CARE SERVICE AREA (CCSA). THE COMMUNITY CARE SERVICE AREAS INCLUDE INDIAN RIVER COUNTY, MARTIN COUNTY, OKEECHOBEE COUNTY, ST. LUCIE COUNTY, PALM BEACH COUNTY AREA A AND PALM BEACH COUNTY AREA B. APPLICANTS THAT INTEND TO SUBMIT A PROPOSAL FOR COMMUNITY CARE SYSTEM LEAD AGENCY DESIGNATION IN MORE THAN ONE CCSA MUST DO SO IN SEPARATE APPLICATIONS RESPONDING TO EACH RESPECTIVE RFP TEXT.

Palm Beach County Area A (North of Hypoluxo Road and Glades/West County)
33460 33461 33462 33405 33406 33413 33415 33480 33409 33417 33401
33407 33403 33404 33408 33410 33477 33458 33469 33463 33411 33414
33418 33412 33478 33470 33467 33438 33476 33430 33493 33449
33440

Palm Beach County Area B (South of Hypoluxo Road)
33435 33436 33444 33445 33486 33487 33431 33432 33483 33426 33437
33484 33446 33496 33498 33434 33428 33433 33472 33473 33067

Indian River County, Martin County, Okeechobee County, St. Lucie County

Proposals may be forwarded through certified mailed (return receipt requested), overnight mail, or hand delivered to Area Agency on Aging of Palm Beach/Treasure

Coast, Inc., **Attention: Laurie Greco, Compliance and Quality Assurance Manager, 701 Northpoint Parkway, Suite 115, West Palm Beach, FL 33407; on or before Noon, November 17, 2026. No additional time shall be added to the time limits when service has been made by mail. After that time no further proposals will be accepted under this solicitation.** Proposals cannot be faxed or e-mailed.

The form, Documentation of Receipt, reflecting the date and time the proposal is received at the Area Agency on Aging of Palm Beach/Treasure Coast office will be completed immediately upon receipt of the proposal and attached to the sealed box containing the proposal.

I. Notice of Intent to Award

If an award under this RFP is made, the Area Agency on Aging of Palm Beach/Treasure Coast will designate as Lead Agencies the responsive, responsible, and best proposer in compliance with this RFP provided said proposal is considered (within the sole discretion of the Area Agency on Aging of Palm Beach/Treasure Coast) reasonable and in the best interest of the Area Agency on Aging of Palm Beach/Treasure Coast to accept. Responsive, responsible, and best refers to the results of the quantitative and qualitative evaluation process followed in the review of all proposals to be submitted. The proposal from the most responsible proposer with the highest score and which is most responsive to the RFP requirements as a whole, will be deemed to be responsive, responsible, and best. The Area Agency on Aging of Palm Beach/Treasure Coast reserves the right to waive any minor irregularity in any proposal. Regardless of any other statements in this RFP, the Area Agency on Aging of Palm Beach/Treasure Coast 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 Area Agency on Aging of Palm Beach/Treasure Coast based on the requirements of the RFP.

m. Appeal Process

In accordance with section 430.203(9)(a)1., F.S., and Rule 58C-1.0031, F.A.C. "Lead Agency Dispute Resolution", any party who is substantially affected by the Area Agency on Aging's intended decision to award a contract for a Lead Agency must file a written notice of protest with the Area Agency on Aging within 72-hours after posting of the Notice of Award, excluding weekends and state holidays. Written notices must be hand delivered or sent certified mail, return receipt requested and received by the Area Agency on Aging within the timeframes indicated above. A substantially affected party is any party who bid on the RFP for designation as a Lead Agency.

A formal written protest must be filed within 10 calendar days after date of the Notice of Protest is filed, unless the 10th day falls on a weekend or state holiday, in which case the deadline shall be the next business day. Any appeal filed after this deadline will be dismissed without further consideration.

The formal written protest must state, with particularity, the facts and law upon which the protest is based. Any appeal that fails to comply with this requirement shall be deemed insufficient and will be dismissed without further consideration. Any entity who files a formal protest of the Area Agency on Aging's RFP Intent to Award decision shall be required to post, at the time of filing the formal written protest, a bond in the amount equal to one percent of the estimated contract amount. The bond shall be conditioned upon the payment of all costs and charges that are adjudged against the protestor in which the action is brought. If, after completion of the appeal process, the Area Agency on Aging of Palm Beach/Treasure Coast prevails, it shall recover all costs and charges which shall be included in the final order or judgment, excluding attorney's fees.

"Failure to file a Notice of Protest as described in subsection (4) of Rule 58C-1.0031, Florida Administrative Code (F.A.C.), shall constitute a waiver of proceedings under Rule 58C-1.0031, F.A.C."

In the event any pending bid protest will result in a disruption in services delivery to elderly clients, the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. reserves the right to contract on an emergency and interim basis, to maintain the delivery of services in place until such time when the protest is resolved.

n. Contract Terms and Conditions

CCE, HCE, and ADI contracts procured through this RFP may be renewed in one-year terms for up to five additional years subject to continued legislative appropriations, satisfactory performance, and any other applicable renewal requirements.

An example of the anticipated contracts, and associated attachments may be found under **Appendix I** to this RFP. All bidders are instructed to read all documents carefully to determine their agency's ability to meet the requirements of the RFP. Proposals must include a signed and dated Contract Terms and Conditions Affidavit (**Appendix II**) that certifies each bidder's intention to abide by all terms and conditions of the CCE, HCE and ADI Standard Agreements.

Failure to submit a fully completed Contract Terms and Conditions Affidavit constitutes a fatal flaw and will automatically disqualify a proposal from further review and consideration.

SECTION C: INSTRUCTIONS TO BIDDERS

The following pages contain general conditions a bidder must follow to submit their proposal. The RFP package must include a Table of Contents, and all pages must be numbered. The bidder should use **Appendix X** (Bidder Checklist) for this purpose. The Table of Contents must note the corresponding page number(s) associated with each item.

1. **BIDDER CERTIFICATION**

The following forms are REQUIRED and must be included in the proposal:

- a. **Administrative Assessment Checklist:** Each bidder is required to fill out this standard checklist to indicate the agency's adherence to commonly accepted fiscal and administrative policies and procedures. The checklist is **Appendix VI** to the RFP.
- b. **Contract Terms and Conditions:** A signed statement indicating the bidder's acceptance of all terms and conditions of the CCE, HCE, and ADI Standard Agreements (**Appendix I**) is required. This Affidavit is included as **Appendix II** to the RFP.
- c. **Statement of No Involvement:** A signed statement indicating neither the bidder, nor any person with an interest in the bidder firm had a noncompetitive contract with the Area Agency on Aging that involved any preliminary work (e.g., feasibility study or actual preparation of the RFP) prior to release of the solicitation document This form is **Appendix III** to the RFP.

FAILURE TO SUBMIT APPENDIX II - Contract Terms and Conditions, AND APPENDIX III - Statement of No Involvement CONSTITUTES A FATAL FLAW, WHICH WILL AUTOMATICALLY DISQUALIFY ANY PROPOSAL FROM FURTHER REVIEW AND CONSIDERATION.

2. **SERVICE PROVIDER APPLICATION FORMATS (APPENDIX Va)** A

separate service provider application must be submitted for each Community Care Service Area (CCSA) the applicant intends to bid on.

- a. Service Provider Summary Information Page

Section I.A. of the Service Provider Application (SPA) **Appendix Va** must be completed in its entirety, and must be signed and dated by an authorized agency official.

- b. Program Module – General Requirements

Section II.A. (Items 1-15) of the SPA (**Appendix Va**) must be completed in its entirety. Detailed instructions are included for each items (1-15) on the specific application format pages. It is helpful to use the guidelines and instructions (**Appendix IV**) to complete each item.

Bidders must provide, in narrative form, information that indicates an understanding of the need for, and purpose for the project, as presented in the RFP.

The proposal must include a detailed description of the program objectives pursued by the bidder, as well as an explanation of how each funded service will be provided to achieve the performance measures intended by the bidder.

c. Contract Module – General Requirements

Section II.B. Items 1-3 of the SPA (**Appendix Va**) must be completed by each bidder. Bidders must closely follow the Unit Costing Methodology and provide the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. with sufficient detail to allow proposal reviewers to determine the appropriateness and accuracy of all identified costs and rates. The review team must be able to establish, through review of factual information submitted by each bidder, that costs are allowable, reasonable and necessary. Budget notes and any additional narrative to give the review team a clearer picture of the bidder's allocation methodology are recommended to be made available.

Section II.B., items 4-9: depending upon the method of match (cash or in-kind) to be provided by bidder, the appropriate "Commitment of Cash or In-Kind" forms (items 4-9) must be completed. Please note the required match may be satisfied through cash or in-kind resources or a combination of both. It is helpful to use the guidelines and instructions (**Appendix IV**). Section II.B., item 10: the "Availability of Documents" form identifies required documentation that must be maintained and available at the bidder's administrative office. The form must be signed and dated by the bidder's authorized agency official.

3. ORGANIZATIONAL CAPABILITY PACKAGE (APPENDIX Vb)

The Organizational Capability Package (**Appendix Vb**) details items requested from the agency submitting a proposal. These items assist the review team in measuring the bidder's management capabilities, financial position and experience. Bidders are urged to pay close attention to the specific requirements in **Appendix Vb** and address each item in detail.

Transition Plan: In the event a selected provider is not the current provider, a Transition Plan of existing clients and service management must be submitted within 20 days of the notice of intent to award. Bidders must include a statement agreeing to submit their Transition Plan within 20 days of the notice of intent to award. The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. must approve this Plan, and it

must include an implementation schedule to ensure uninterrupted service delivery. Failure to submit an adequate plan within the 20 days of the notice of intent to award may result in cancellation of award.

Transition Plans must take into consideration the transfer of current client files, staffing and training plans, start-up activities, timeframes for completion, any modification of service delivery schedules and sites, and notification to clients of the new service provider agency.

If there is insufficient time for the current and new service providers to transition services so there is no disruption in service delivery, the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. may choose to continue services with the current Lead Agency under an emergency contract until the transition is complete.

SECTION D: PROPOSAL EVALUATION CRITERIA AND RFP RATING SHEET

1. Description of Evaluation Criteria

Each proposal will be evaluated according to the standards contained in **Appendices: VII (Proposal Fatal Criteria) & VIII (Proposal Evaluation)**. Fatal Criteria are items that require the same response from all bidders. Non- fatal criteria are items that can be responded to differently by bidders.

"Fatal" criteria require only a YES or NO response, and if not met in full, the proposal will not be considered further. An Area Agency on Aging of Palm Beach/Treasure Coast, Inc. committee under supervision of the person charged with oversight for this RFP will review all proposals submitted and accepted. **Proposals which receive a negative answer to any item listed in the "Fatal Criteria" section of the Evaluation Scale will be immediately eliminated from further consideration.**

"Non-Fatal" evaluation criteria evaluate the quality and / or completeness of the bidder's response and are rated on a point scale.

To evaluate non-fatal criteria, each section of the proposal is rated as follows:

1. Individual items in each section will be rated on a point scale of 0 to 4, with 4 being the highest rating.
2. A section total is determined by adding the individual section ratings and dividing by the total number of items in that section.
3. A weight value for the section is determined by multiplying the section total by a predetermined weight assigned to that section.
4. A rating for the proposal as a whole is determined by adding the weighted values for each section.

A MINIMUM RATING OF "TWO" IS REQUIRED UNDER THE TOTAL SCORE FOR A PROPOSAL TO BE CONSIDERED.

The evaluation criteria have been designed to give due consideration to agencies able to demonstrate:

- Collaboration and partnerships with the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. and other service entities
- Experience providing the services(s)
- Ability to meet minimum service standards and contract requirements as set forth by the DOEA and the Area Agency on Aging of Palm Beach/Treasure Coast, Inc.

- Ability to identify areas of need and strategies to address client outcomes
- Unit cost

Using the Proposal Evaluation Instrument (**Appendix VIII**), an RFP Review and Evaluation Committee appointed by the Area Agency on Aging Chief Executive Officer will evaluate all written proposals. Proposals scoring less than a minimum rating of **"Two"** will be eliminated from further consideration.

All bidders whose proposals have been reviewed and received a minimum score of **"Two"** or higher may be considered.

In addition to the Proposal Evaluation Instrument, a Bidder Checklist (**Appendix X**) has been provided to assist bidders in determining if their proposal contains all required items. This document must be completed and forwarded with the RFP package. All items should be initialed noting these items are in the bidder's RFP package.

Each member of the RFP Review and Evaluation Committee is required to complete a Conflict of Interest Questionnaire to ensure they have no conflict of interest, which could interfere in the selection of a contractor. If a committee member answers "yes" to any question on the Conflict of Interest Questionnaire, their participation in the selection team must be terminated and the person must be replaced by someone without a conflict.

The Area Agency on Aging of Palm Beach/Treasure Coast, Inc. Board of Directors has ultimate approval of provider awarded contracts based upon the recommendations of the RFP Review and Evaluation Committee.

2. RFP Rating Sheet

It is recommended each bidder complete a self-review of their RFP prior to submitting their response. **See Appendices VII and VIII.**

END OF DOCUMENT