

APPENDIX Vb

ORGANIZATIONAL CAPABILITY PACKAGE

Please provide the listed items in the order specified below:

1. A copy of the most recent audited financial statements and compliance reporting package. Include any letters to management submitted by the independent auditor under separate cover as well as any response stating management's position and plan of action.
2. Certificate(s) of insurance for General Liability, Professional Liability, Automobile Liability Hired/Non-Owned, Auto for Owned Vehicles, if applicable and Worker's Compensation Insurance at a minimum. Coverage at a minimum is as follows: 1M/2M General Liability; 1M/3M Professional Liability; 500K Auto Liability.
3. An organizational chart illustrating the structure and relationship of positions related to CCE, HCE and ADI programs. Copies of job descriptions for all positions indicated on the Personnel Allocations Worksheet.
4. A statement certifying the bidder's current Personnel Policies meet the minimum requirements as specified in the RFP under "Personnel Standards and Employee Benefits."
5. A copy of the Administrative Assessment Checklist required by this RFP (Refer to Appendix VI)
6. A signed certification of the availability of 60 days operating funds.
7. Provide copies of any notice(s) of deficiency for contract non-compliance requiring a Corrective Action Plan(s) (CAP) issued to the applicant for programs of similar services in the last two years as well a current status of each CAP (i.e., resolved (identifying when and how it was resolved), or pending/unresolved (identifying an anticipated resolution time)), or statement indicating that the applicant has not been subject to any notice(s) of deficiency for contract non-compliance in the last two years.
8. Documentation of experience in the provision of service(s) to frail elders, as well as the length of time (in years) you have worked to meet the needs of elders in the State of Florida. If the Bidder has not provided service(s) in the State of Florida, service history elsewhere is submitted as support documentation. The Bidder must supply contact person(s), name, address, telephone number of contracting agencies.
9. A statement certifying the bidder's agreement to forward a transition plan

within 20 days of the notice of award. In the event a provider is selected who is not a current provider, a plan for transition of existing clients and service management must be submitted 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 award may result in cancellation of award.

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

If there is insufficient time remaining before the current service provider and the new service provider can transition the service in a manner that will not disrupt service delivery as of July 1, 2027, 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.

10. A current board roster and/or current roster of legal governing body and corporate bylaws.
11. Copies of the articles of incorporation and the IRS determination letter granting tax exempt status or statement that the bidder is a government organization.
12. A copy of the most recent IRS Form 990 (Not for Profit) or Form 1120/1120S (for Profit) or a statement that the bidder is a government organization.
13. Monitoring reports of your organization from external funders for 2024 and 2025: two fiscal and two programmatic reports with resolution on how problems identified, if any, were addressed. Redact any client-specific information.