

APPENDIX X BIDDER CHECKLIST

Bidders are encouraged to use this checklist to assure that all required proposal items/timelines have been met. The proposer is cautioned to read and become familiar with all sections of the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. proposal documents. Failure to do so may result in the submission of an irregular proposal resulting in its possible rejection by the Area Agency on Aging of Palm Beach/Treasure Coast, Inc. The following itemized checklist identifies various items of the proposal documents, which should be particularly examined by the proposer. Proposers should carefully review the items specified for submission in all of the RFP documents. No representation is made that the following checklist is a complete guide to every submission requirement in the RFP documents.

Minimum Requirements For A Proposal To Be Considered:

- ___ 1. Delivered by 12:00 pm on November 17, 2026.
- ___ 2. All copies of the proposal must be delivered in an envelope or container that is securely sealed and clearly marked on the outside with the name of the RFP, the bidder and the Community Care Service Area being bid on.
- ___ 3. Signed Statement of No Involvement
- ___ 4. Signed Contract Terms and Conditions Affidavit
- ___ 5. Summary Information Page signed by a person authorized to bind the agency to all contractual obligations (Title Page of Service Provider Application, Section I.A.)
- ___ 6. Signed cash and/or in-kind commitment forms that guarantee the bidder's ability to provide adequate matching funds or, lacking that, written justification for its non-submission.

Verify that the following sections of the **Service Provider Application** have been properly submitted:

I.A. Service Provider Summary Information	Initial if submitted _____
II.A. Program Module Documents:	
1. Demographics and Community Care Service System	_____
2. Consumer Identification	_____
3. Care Management Functions	_____
4. Services	_____
a. Subcontract Monitoring Schedule	_____

	Initial if submitted
5. Quality Assurance	_____
6. Process for Incident Reporting, and Consumer Complaint and Grievance Procedures	_____
7. Reporting	_____
8. Client Confidentiality & Security	_____
9. Disaster Preparedness	_____
10. Volunteer Plan	_____
11. Organizational Chart	_____
12. Description of Service Delivery (by Service)	_____
13. Strategies and Performance Measures	_____
14. SPA Appendix	_____
15. Program Module Review Checklist	_____

II.B. Contract Module Documents:

	Initial if submitted
1. Personnel Allocations Worksheet	_____
2. Unit Cost Worksheet	_____
3. Supporting Budget Schedule by Program Activity	_____
4. Commitment of Cash Donation	_____
5. Commitment of In-kind Contribution of Space	_____
6. Commitment of In-Kind Contribution of Supplies	_____
7. Commitment of In-Kind Contribution of Equipment	_____
8. Commitment of In-Kind Contribution of Services	_____
9. Commitment of In-Kind Volunteer Personnel and Travel	_____
10. Availability of Documents	_____
11. SPA Contract Module Review Checklist	_____

Verify that the following sections of the **Organizational Capability Package** have been properly submitted:

	Initial if submitted
1. Most Recent Audited Financial Statements	_____
2. Certificate(s) of Insurance	_____
3. Organization Chart and Job Descriptions	_____
4. Personnel Policies Certification Statement	_____
5. Administrative Assessment Checklist	_____
6. Certification of 60 days operating funds	_____
7. Notice(s) of deficiency for contract non-compliance requiring a <u>Corrective</u> Action Plan(s) (CAP)	_____
8. Documentation of Experience	_____
9. Transition Plan Certification	_____
10. Current board roster and corporate bylaws	_____
11. Articles of Incorporation and IRS determination letter	_____
12. IRS Form 990 or Form 1120/1120S	_____
13. Monitoring Reports	_____