

**REQUEST FOR PROPOSAL 17-0244FL  
COMMUNITY CARE FOR THE ELDERLY (CCE) HOMEMAKER,  
PERSONAL CARE, RESPITE, EMERGENCY ALERT RESPONSE (EAR)  
AND ALZHEIMER'S DISEASE INITIATIVE (ADI) RESPITE SERVICES**

Manatee County, a political subdivision of the State of Florida (hereinafter "Manatee County" or "County") will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida, to provide Community Care for the Elderly (CCE) Homemaker, Personal, Respite Care, Emergency Alert Response (EAR) and Alzheimer's Disease Initiative (ADI) Services.

**DATE, TIME AND PLACE DUE:** Proposals will be received until **December 5, 2016 at 4:00 P.M.** at which time they will be **publicly opened at Manatee County Procurement Division, 1112 Manatee Ave. W., Suite 803, Bradenton, FL 34205.** All interested parties are invited to attend this opening.

**DEADLINE FOR CLARIFICATION REQUESTS:** **November 21, 2016 at 1:00 P.M.** shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Procurement Division. This deadline has been established to maintain fair treatment for all potential proposers, while ensuring an expeditious transition to a final agreement.

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**Important: A prohibition of lobbying is in place. Please review Section A.09 carefully to avoid violation and possible sanctions.**

**AUTHORIZED CONTACT:**

Frank G. Lambertson, Contracts Negotiator  
(941) 749-3042, Fax (941) 749-3034  
Email: [frank.lambertson@mymanatee.org](mailto:frank.lambertson@mymanatee.org)  
Manatee County Financial Management Department  
Procurement Division

AUTHORIZED FOR RELEASE: DWW

**REQUEST FOR PROPOSAL 17-0244FL  
COMMUNITY CARE FOR THE ELDERLY (CCE) HOMEMARKER,  
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AND ALZHEIMER'S DISEASE INITIATIVE (ADI) RESPITE SERVICES**

**SECTION A:  
INSTRUCTIONS TO PROPOSERS**

In order to receive consideration, proposers must comply with the following instructions. Proposals may be presented by a single business entity, joint venture, partnership or corporation.

**A.01 PUBLIC SEALED PROPOSAL OPENING**

Sealed proposals will be **publicly opened** at **Manatee County Procurement Division, 1112 Manatee Avenue West, 8<sup>th</sup> Floor, Suite 803, Bradenton, Florida 34205**, in the presence of County officials at the time and date stated, or at such time as the final call for proposals is made. All proposers or their representatives are invited to attend the sealed proposal opening.

No review or analysis of the proposals will be conducted at the public opening. Manatee County will receive proposals at the time and date stated and will make public at the opening the names of the business entities which submitted a proposal and city and state in which they reside.

Proposal(s) received after the final call for proposals has been made will not be considered. It will be the sole responsibility of the proposer to have their proposal delivered to the Manatee County Procurement Division for receipt on or before the stated time and date. If a proposal is sent by U.S. Mail, the proposer will be responsible for its timely delivery to the Procurement Division. Proposals delayed by mail will not be considered, will not be opened at the public opening, and arrangements will be made for their return at the proposer's request and expense.

**A.02 SEALED & MARKED PROPOSAL**

The contents of your sealed package will include: **One (1) signed Original (marked Original) and Four (4) Copies (each marked Copy) and One (1) Electronic copy.** The electronic copy will be in a pdf format and submitted on a CD or USB flash drive which is non-returnable. ***All physical and electronic copies shall be identical.***

Your complete proposal package will be submitted in one sealed package addressed from your company (name and address) and clearly marked on the outside **"Sealed Proposal 17-0244FL Community Care for the Elderly (CCE) Homemaker, Personal Care, Respite, Emergency Alert Response (EAR) and Alzheimer's Disease Initiative (ADI) Respite Services"** and addressed to:

Manatee County Procurement Division  
1112 Manatee Avenue West, Suite 803  
Bradenton, FL 34205

The contents of each proposal will be **separated and arranged with tabs in the same order as listed in the subsections within Section C** identifying the response to each specific item thereby facilitating an expedient review.

Proposals will clearly indicate the legal name, address and telephone number of the proposer (company, firm, partnership, individual). Proposals will be signed above the typed or printed name and title of the signer. The signer will have the authority to bind the proposer to the submitted proposal.

#### **A.03 SECURING PROPOSAL DOCUMENTS & ADDENDA**

Request for Proposals and all documents issued pursuant to the Request for Proposal are available for download at no charge at [mymanatee.org](http://mymanatee.org) by clicking on "**Bids and Proposals**" on the left side of the home page. You may view and print these pdf files using Adobe Reader software.

Manatee County may also use DemandStar to distribute proposals. Visit the DemandStar website at [www.Demandstar.com](http://www.Demandstar.com) for more information regarding this service. Participation in the DemandStar system is not a requirement for doing business with Manatee County.

Complete copies of the Request for Proposal and all related documents are available for public inspection at the Manatee County Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205, or by calling (941) 749-3014. Appointments are encouraged. Documents are available between the hours of 8:00 A.M. and 5:00 P.M. Monday through Friday, with the exception of holidays.

In addition, Manatee County informs Manatee Chamber of Commerce of all active solicitations, who then distributes the information to their members.

If any addenda are issued to this Request for Proposal, Manatee County will post the documents on the Procurement Division's web page at <http://www.mymanatee.org/purchasing>, and then by clicking on "**Bids and Proposals**". If the original solicitation was broadcast via DemandStar, the addenda will also be broadcast on the DemandStar distribution system to "Planholders" on this web service.

It will be the responsibility of each proposer, prior to submitting their proposal, to contact Manatee County Procurement Division at (941)749-3014, to determine if addenda were issued and to acknowledge receipt of same on Attachment A Proposal Signature Form.

#### **A.04 PROPOSAL EXPENSES**

Any and all expenses for making and submitting proposals to Manatee County are to be borne by the proposer.

#### **A.05 CLARIFICATION PERIOD**

Each proposer will examine all Request for Proposal documents and will judge all matters relating to the adequacy and accuracy of such documents. Any inquiries,

suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal will be made in writing and sent to the Manatee County Procurement Division. Manatee County will not be responsible for oral interpretations given by any County employee, representative, or others. The issuance of a written addendum by the Procurement Division is the only official method whereby interpretation, clarification or additional information can be given.

**DEADLINE FOR CLARIFICATION REQUESTS:** **November 21, 2016, at 1:00 P.M.** will be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to Manatee County Procurement Division.

This deadline has been established to maintain fair treatment for all potential proposers, while ensuring an expeditious transition to a final agreement.

**A.06 FALSE OR MISLEADING STATEMENTS**

Proposals which contain false or misleading statements or which provide references which do not support an attribute or condition claimed by the proposer, may be rejected. If, in the opinion of Manatee County, such information was intended to mislead County in its evaluation of the proposal, and the attribute, condition or capability is a requirement of this proposal, it will be the basis for rejection of the proposal. Such proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to and from submitting any future bids or proposals to supply goods or services to Manatee County.

**A.07 RULES FOR WITHDRAWAL OR REVISION OF OPENED PROPOSALS**

Proposers may withdraw proposals as follows:

- a. Mistakes discovered before the public proposal opening may be withdrawn by written notice from the proposer submitting the proposal. This request must be received in the Procurement Division prior to the time set for delivery and opening of the proposals. A copy of the request shall be retained and the unopened proposal returned to the proposer; or
- b. After the proposals are opened or a selection has been determined, but before an agreement is signed, a proposer alleging a material mistake of fact may be permitted to withdraw their proposal if:
  1. The mistake is clearly evident in the solicitation document; or
  2. Proposer submits evidence which clearly and convincingly demonstrated that a mistake was made. Request to withdraw a proposal must be in writing and approved by the Purchasing Official.

**A.08 JOINT VENTURES**

All proposers intending to submit a proposal as a Joint Venture are required to have filed proper documents with the Florida Department of Business and

Professional Regulation and any other state or local licensing agency prior to submitting the proposal (see Section 489.119, Florida Statutes).

**A.09 LOBBYING**

After the issuance of any Request for Proposal, prospective proposers, or any agent, representative or person acting at the request of such proposer will not contact, communicate with or discuss any matter relating in any way to the Request For Proposal with any officer, agent or employee of Manatee County other than the Purchasing Official or as directed in the Request for Proposal. This prohibition includes copying such persons on all written communication, including email correspondence. This requirement begins with the issuance of a Request for Proposal and ends upon execution of the final contract or when the proposal has been cancelled. Violators of this prohibition will be subject to sanctions as provided in the Manatee County Code of Laws.

**A.10 EXAMINATION OF OFFER**

The examination of the proposal and the proposer generally requires a period of not less than ninety (90) calendar days from the opening date of the proposals.

**A.11 ERRORS OR OMISSIONS**

Once a proposal is opened, Manatee County will not accept any request by any proposer to correct errors or omissions in the proposal.

**A.12 DISQUALIFICATION DUE TO NON-RESPONSIVENESS**

Manatee County reserves the right to determine that any proposal received which does not contain all of the information, attachments, verification, forms or other information, may be considered non-responsive and therefore be disqualified from eligibility to proceed further in the Request for Proposal process.

**A.13 RESERVED RIGHTS**

Manatee County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the due date may or may not be rejected by County depending on available competition and timely needs of Manatee County. County reserves the right to award the contract to a responsible proposer submitting a responsive proposal, with a resulting negotiated agreement which is most advantageous and in the best interests of County.

County will be the sole judge of the proposal, and the resulting negotiated agreement that is in its best interest and its decision will be final. Also, County reserves the right to make such investigation as it deems necessary to determine the ability of any proposer to perform the work or service requested. Information County deems necessary to make this determination will be provided by the proposer. Such information may include, but will not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

**A.14 APPLICABLE LAWS**

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with any Manatee County procurement will be in accordance with Manatee County Code of Laws, Chapter 2-26.

**A.15 TAXES**

Manatee County is exempt from Federal Excise and State Sales Taxes. (F.E.T. Cert. No. 59-78-0089K; Florida Sales Tax Exempt Cert. No. 85-8012622206C-6); therefore, the proposer is prohibited from delineating a separate line item in his proposal for any sales or service taxes. Nothing herein will affect the proposer's normal tax liability.

The Successful Proposer will be responsible for the payment of taxes of any kind and character including but not limited to sales, consumer, use, and other similar taxes payable on account of the work performed and/or materials furnished under the award in accordance with all applicable laws and regulations during the performance of the work. Nothing herein will affect the proposer's normal tax liability.

**A.16 SCRUTINIZED COMPANIES**

Florida Statutes § 287.135, as amended from time to time, may contain limitations on the part of a company to conduct business with the County. Submission of a response to this solicitation shall be subject to all procedural requirements contained within that statute including the submission of any required certification of eligibility to contract with the County. It shall be the responsibility of the company responding to this solicitation to concurrently review the current version of the statute and ensure it is compliant.

**A.17 COLLUSION**

By offering a submission to this Request for Proposal, the proposer certifies the proposer has not divulged to, discussed or compared his/her proposal with other proposers and has not colluded with any other proposer or parties to this proposal whatsoever. Also, the proposer certifies, and in the case of a joint proposal, each party thereto certifies, as to their own organization that in connection with this proposal:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other proposer or with any competitor;
- b. any prices and/or cost data quoted for this proposal have not been knowingly disclosed by the proposer prior to the scheduled opening directly or indirectly to any competitor;

- c. no attempt has been made or will be made by the proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition;
- d. the only person or persons interested in this proposal as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this proposal or in the contract to be entered into; and
- e. no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

**A.18 CODE OF ETHICS**

With respect to this proposal, if any proposer violates, directly or indirectly, the ethics provisions of the Manatee County Procurement Code and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part II, Code of Ethics for Public Officers and Employees, such proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to and from submitting any future bids or proposals to supply goods or services to Manatee County.

**A.19 PUBLIC ENTITY CRIMES**

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

In addition, Manatee County Code of Laws Chapter 2-26 Article V prohibits the award of County contracts to any person or entity who/which has, within the past 5 years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Purchasing Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a reasonable manner.

To ensure compliance with the foregoing, Manatee County Code of Laws requires all persons or entities desiring to contract with Manatee County to execute and file with the Purchasing Official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity, and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded



business with Manatee County. Proposer is to complete Attachment "B" and submit with your proposal.

**A.20 AMERICANS WITH DISABILITIES**

Manatee County does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of County's functions including one's access to participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for an information conference or proposal opening should contact the person named on the cover page of this document at least twenty-four (24) hours in advance of either activity.

**A.21 EQUAL EMPLOYMENT OPPORTUNITY**

In accordance with Title VI of the Civil Rights Act of 1964, Title 15, Part 8 of the Code of Federal Regulations and the Civil Rights Act of 1992, Manatee County hereby notifies all proposers that it will affirmatively ensure minority business enterprises are afforded full opportunity to participate in response to this Request For Proposal and will not be discriminated against on the grounds of race, color, national origin, religion, sex, age, handicap, or marital status in consideration of award.

**A.22 MINORITY AND/OR DISADVANTAGED BUSINESS ENTERPRISE**

The State of Florida Office of Supplier Diversity provides the certification process and maintains the database of certified MBE/DBE firms. Additional information may be obtained at <http://www.osd.dms.state.fl.us/iframe.htm> or by calling (850) 487-0915.

**A.23 DISCLOSURE**

Upon receipt, all inquiries and responses to inquiries related to this RFP become "Public Records", and shall be subject to public disclosure consistent with Florida Statute, Chapter 119.

Proposals become subject to disclosure thirty (30) days after the opening or if a notice of intent to award decision is made earlier than this time as provided by Florida Statutes § 119.071(1)(b). No announcement or review of the proposals shall be conducted at the public opening.

Based on the above, County will receive proposals at the time and date stated and will make public at the opening the names of the business entities of all that submitted a proposal.

If County rejects all proposals and concurrently notices its intent to reissue the solicitation, the rejected proposals are exempt from public disclosure until such time as County provides notice of an intended decision concerning the reissued solicitation or until County withdraws the reissued solicitation. A proposal is not exempt for longer than twelve (12) months after the initial notice rejection of all proposals.

Pursuant to Florida Statutes 119.0701, to the extent Successful Proposer is performing services on behalf of the County, Successful Proposer must:

- a. Keep and maintain public records required by public agency to perform the service.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119, or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Successful Proposer does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of contractor or keep and maintain public records required by the public agency to perform the service. If the Successful Proposer transfers all public records to the County upon completion of the contract, the Successful Proposer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Successful Proposer keeps and maintains public records upon completion of the contract, the Successful Proposer shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from County's custodian of public records, in a format that is compatible with the information technology systems of the County.

**IF THE SUCCESSFUL PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO ANY RESULTING CONTRACT, CONTACT COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT: (941) 742-5845, debbie.scaccianoce@mymanatee.org, Attn: Records Manager, 1112 Manatee Ave W., Bradenton, FL 34205.**

#### **A.24 TRADE SECRETS**

In accordance with Chapter 119, Florida Statutes, all documents, materials, and data submitted to any solicitation as part of the response are governed by the disclosure, exemption and confidentiality provisions relating to public records in Florida Statutes. Except for materials that are "trade secrets" or "confidential" as defined by Florida public records law, ownership of all documents, materials and data submitted in response to the Request for Proposal shall belong exclusively to the County.

To the extent that proposer desires to maintain the confidentiality of materials that constitute trade secrets pursuant to Florida law, trade secret material submitted

must be identified by some distinct method that the materials that constitute a trade secret, and proposer shall provide an additional copy of the proposal that redacts all designated trade secrets. By submitting materials that are designated as trade secrets and signature of the proposer on its proposal, proposer acknowledges and agrees:

- a. That after notice from the County that a public records request has been made for the materials designated as a trade secret, the proposer shall be solely responsible for defending its determination that submitted material is a trade secret that is not subject to disclosure at its sole cost, which action shall be taken immediately, but no later than 10 calendar days from the date of notification or proposer will be deemed to have waived the trade secret designation of the materials;
- b. That to the extent that the proposal with trade secret materials is evaluated, the County and its officials, employees, agents, and representatives in any way involved in processing, evaluating, negotiating contract terms, approving any contract based on the proposal, or engaging in any other activity relating to the competitive selection process are hereby granted full rights to access, view, consider, and discuss the materials designated as trade secrets through the final contract award;
- c. To indemnify and hold the County, and its officials, employees, agents and representatives harmless from any actions, damages (including attorney's fees and costs), or claims arising from or related to the designation of trade secrets by the proposer, including actions or claims arising from the County's non-disclosure of the trade secret materials.
- d. That information and data it manages as part of the services may be public record in accordance with Chapter 119, Florida Statutes and Manatee County public record policies. Proposer agrees, prior to providing goods/services, it will implement policies and procedures, which are subject to approval by the County, to maintain, produce, secure, and retain public records in accordance with applicable laws, regulations, and County policies including but not limited to Section 119.0701, Florida Statutes.

Notwithstanding any other provision in the solicitation, the classification as trade secret of the entire proposal document, line item and/or total proposal prices, the work, services, project, goods, and/or products to be provided by proposer is not acceptable to the County and will result in a determination that the proposal is non-responsive; the classification as trade secret of any other portion of a proposal document may result in a determination that the proposal is non-responsive.

#### **A.25 CONFIDENTIALITY OF SECURITY RELATED RECORDS**

(a) Pursuant to Florida Statutes § 119.071(3), the following records (hereinafter referred to collectively as "the Confidential Security Records") are confidential and exempt from the disclosure requirements of Florida Statutes § 119.07(1):

1. A Security System Plan or portion thereof for any property owned by or leased to the County or any privately owned or leased property held by the County.

2. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County.

3. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout or structural elements of an attractions and recreation facility, entertainment or resort complex, industrial complex, retail and service development, office development, or hotel or motel development in the possession of, submitted to the County.

(b) Successful proposer agrees that it shall not, as a result of a public records request or for any other reason disclose the contents of, or release or provide copies of the Confidential Security Records to any other party absent the express written authorization of the County's Property Management Director or to comply with a court order requiring such release or disclosure. To the extent Successful Proposer receives a request for such records, it shall immediately contact the County's designated Contract Manager who shall coordinate the County's response to the request. Notwithstanding the foregoing, the Successful Proposer may

1. Disclose or release Security System Plans to:

- (A) The property owner or leaseholder; or
- (B) Another state or federal agency to prevent, detect, guard against, respond to, investigate, or manage the consequences of any attempted or actual act of terrorism, or to prosecute those persons who are responsible for such attempts or acts.

2. Disclose or release building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County:

- (A) To another governmental entity if disclosure is necessary for the receiving entity to perform its duties and responsibilities;
- (B) To a licensed architect, engineer, or contractor who is performing work on or related to the building, arena, stadium, water treatment facility, or other structure owned or operated by the County and is contractually bound by the Successful Proposer to comply with this Section; or
- (C) Upon a showing of good cause before a court of competent jurisdiction.

(c) For purposes of this Section, the term "Security System Plan" includes all:

1. Records, information, photographs, audio and visual presentations, schematic diagrams, surveys, recommendations, or consultations or portions thereof relating directly to the physical security of the facility or revealing security systems;
2. Threat assessments conducted by any agency or any private entity;
3. Threat response plans;
4. Emergency evacuation plans;
5. Sheltering arrangements; or
6. Manuals for security personnel, emergency equipment, or security training.

**A.26 E-VERIFY**

Prior to the employment of any person under this contract, the Successful Proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of (a) all persons employed during the contract term by the Successful Proposer to perform employment duties within Florida and (b) all persons, including subcontractors, assigned by the Successful Proposer to perform work pursuant to the contract with Manatee County. For more information on this process, please refer to United States Citizenship and Immigration Service site at: <http://www.uscis.gov/>.

**Only those individuals determined eligible to work in the United States shall be employed under this contract.**

By submission of a proposal in response to this Request for Proposal, the Successful Proposer commits that all employees and subcontractors will undergo e-verification before placement on this contract.

If County has reasonable objection to any subcontractor, the county may request the Successful Proposer to submit an acceptable substitute without an increase in contract sum or contract time.

If Successful Proposer declines to make any such substitution, the County may award the resulting agreement to the next lowest qualified proposer that proposes to use acceptable subcontractors, who County does not make written objection to. In the event the Successful Proposer declines to make any such substitution post award, the County may exercise its right to terminate the agreement.

The Successful Proposer shall maintain sole responsibility for the actions of its employees and subcontractors. New employees brought in after contract award shall follow the same requirement stated above for the life of the contract.

**END SECTION A**

## **SECTION B:** **SCOPE OF SERVICES**

### **B.01 BACKGROUND INFORMATION**

Manatee County, FL is a growing community in Southwest Florida on the Gulf of Mexico. The County's total area is 893 square miles of which 152 square miles is water. There are five (5) municipalities in Manatee County: Bradenton, Bradenton Beach, Palmetto, Anna Maria, and Holmes Beach.

The county is located between Tampa and Sarasota, and its population has increased from 264,002 in 2000 to 351,746 in 2015. Manatee County has planned for growth. Residential and commercial development has been occurring along and east of the 1-75 corridor.

### **B.02 GENERAL REQUIREMENTS**

The Scopes of Service listed below are attached to this Request for Proposal (Attachments C thru G) and are contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for the Community Care for the Elderly Program (CCE) calls for the following services to serve out citizens:

Homemaker Services - Scope of Service	Attachment C
Personal Care Services - Scope of Service	Attachment D
Respite Services – Scope of Service	Attachment E
Emergency Alert Response (EAR) – Scope of Service	Attachment F
Alzheimer's Disease Initiative (ADI) – Scope of Service	Attachment G

The County will have the option to make multiple awards as deemed necessary.

### **B.03 TECHNICAL REQUIREMENTS**

The following unit fees have been established by the Manatee County Human Services Division, Community Services Department for the services to be provided:

CCE Homemaker	\$19.61
CCE Personal Care	\$22.44
CCE Respite Care	\$23.21
CCE Emergency Alert Response	\$50.00 Install / 0.85 per day
ADI Respite	\$23.21

## **END SECTION B**

## **SECTION C: FORM OF PROPOSAL**

This section identifies specific information which must be contained within your proposal and the order in which such information should be organized.

The information each proposer provides will be used to determine those proposers with perceived ability to perform the scope of services as stated in this Request for Proposal which may best meet the overall needs of Manatee County. A review with those proposers reasonably susceptible of being selected for award may be conducted for the purposes of clarification of both ability and benefit to Manatee County. For more information, refer to Section D, Evaluation of Proposals.

### **C.01 INFORMATION TO BE SUBMITTED**

To qualify for consideration, the proposer(s) must present proof of any licensing or certification which will be required by law to perform the services set out in Section B, Scope of Services. If no licensing or certification is required, proposer shall indicate same.

All proposals found to be responsive will be considered by an evaluation committee.

The contents of each proposal will be **separated** and **arranged with tabs** in the same order as listed below and with the same subsection number beginning with C.01.1 in order to organize the response to each specific subsection.

C.01.1 Provide a **cover page**, general introductory statement, **include which services you are proposing to provide and table of contents**. Provide proof of any licensing or certification required by law to perform the services and generally describe your proposal in summary form, or if no licensing or certification is required, indicate same.

C.01.2 **Forms.** Provide the completed and executed Attachments included in this Request for Proposal.

- a. Proposal Signature Form (Attachment A)
- b. Public Contracting and Environmental Crimes Certification (Attachment B)
- c. Joint Venture Agreement (Section A.08 and Section C.01.12), if applicable

C.01.3 Provide a description of your company's **background and size**. Include an organizational chart depicting the structure, lines of authority and communication.

C.01.4 Clearly demonstrate your company's **experience** for services you are proposing.

- a. Proposers must provide the following details to demonstrate past relevant experience and performance:
    - i. Name of the client.
    - ii. Specific details about the services provided, including location.
    - iii. Value of the contract.
    - iv. Duration of the contract, including inception and completion dates
    - iv. Specify the name, title, telephone, and email for the client's contract manager for the specified experience.
  - b. Names of proposer's staff and their direct involvement in the services; and names of proposer's subcontractors and their role in the services.
  - c. Governmental agency, if any, which verified compliance with its requirements or standards, and the names and telephone numbers of the key persons with direct knowledge of the compliance.
  - d. Provide any other governmental or municipality experience if not previously specified.
- C.01.5 Provide your company's **project approach** for the services you are proposing. Provide a narrative of the project approach and how this approach meets Manatee County objectives. Include an explanation of your company's technical ability to perform all facets of the scope of services. If more than one proposer is jointly filing a proposal, details must be provided to clearly demonstrate individual roles and responsibility for all components of the project.
- C.01.6 Identify each **principal of the proposer and other key personnel** who will be interacting with Manatee County. Do not include personnel that will not have a key role in providing services. Describe each person's respective area of expertise.
- For each identified person, provide a personal resume which includes qualifications, training and experience. Resumes shall also include the following information:
- a. Full name and title
  - b. Professional credentials
  - c. Individual's intended roles and duties in providing services pursuant to this Request for Proposal
  - d. Office address and web address
  - e. Email address and telephone number
- C.01.7 Submit a **staffing level statement** for your organization, detailing how many total employees work for your firm at any one time, including temporary and part-time employees. List the ratio of full-time employees to part-time, and temporary employees.



- C.01.8 Include a **subcontractor plan** detailing how subcontractors will be used and to what extent. County reserves the right to request additional information in the same level of detail and tabbed order as the proposal for each subcontractor.
- C.01.9 **Location and Local Office:** Identify the office location which will be primarily responsible for this proposed project and the office location of the staff that will be assigned to this proposed project if different. Include the year both locations were established. Proposer(s) should describe whether the managing office will be located within the County.
- C.01.10 **Local Employment.** If proposed, describe detail plans, policies, and goals (as a percentage) which ensure County citizens receive preferential consideration for employment and vendors located within the County will be used as suppliers of goods and services needed to perform the scope of services. Include your approach to providing periodic reporting to monitor success in maintaining the percentage. If available, provide examples of reports.
- C.01.11 **Recent, Current, and Projected Workload:** List all projects handled by your firm during the past five (5) years and identify the volume of work previously awarded by Manatee County.
- C.01.12 Provide an **explanation of the proposers' legal capacity** to perform all facets of the Scope of Services. Include a description of corporate or other structure and governance, and detail the legal capabilities of proposer(s) relevant to performing the scope of services. If more than one proposer is teaming up to file a proposal, any prior work any two or more joint proposers have performed before should be detailed.
- Joint venture firms must provide an affidavit attesting to the formulation of a joint venture and provide either proof of incorporation as a joint venture or a copy of the formal joint venture agreement between all joint venture parties, indicating their respective roles, responsibilities, and levels of participation in the project.
- C.01.13 Provide any and all information concerning any **prior or pending litigation**, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the proposer, any of its partners, employees or subcontractors is or has been involved within the last three years.
- C.01.14 Provide an **explanation of the proposers' financial capacity** to perform all parts of the scope of services. If more than one proposer is jointly filing a proposal, details must be provided to demonstrate financial capacity of all proposers.

- C.01.15 Provide the proposer's most recent independently prepared annual financial summary statement. Such statements will include balance sheets and profit and loss statements.

Provide authorization for a Manatee County auditor and/or financial analysts to have **access to your financial records, including any and all records prepared by an independent firm**, or the financial records of other entities for which you have ownership interest. Such access will occur at the primary location of the proposer, or such other location as may be agreed, for the purposes of verifying financial representations, and/or to review and assess the historical and current financial capacity of your business entity and its expected ability to meet ongoing financial obligations as proposed to Manatee County.

Manatee County's audit and /or financial analysts will report their findings in a summary report to the Manatee County Purchasing Official, which will be placed in the proposal files for subsequent use and review.

- C.01.16 Disclose **any ownership interest in other entities** involved in these services which might reasonably be selected to perform work under the scope of services set forth in this Request for Proposal. This ownership disclosure will be included, whether such ownership occurs by the proposer through a parent, subsidiary or holding company or any other form of business entity. Submit entity names and the percent of ownership for each.
- C.01.17 Include at least three (3) **references** who can substantiate proposer's qualifications, credentials and experience. Do not duplicate references used for past performance.
- C.01.18 Submit any other additional information which would assist County in the evaluation of your proposal.
- C.01.19 Submit a summary of proposer's **environmental sustainability** initiatives. All proposers are encouraged to use as many environmentally preferable "green" products, materials, supplies, etc. as possible in order to promote a safe and healthy environment. Environmentally preferable are products or services that have a reduced adverse effect on the environment.

### **END SECTION C**

## **SECTION D: EVALUATION OF PROPOSALS**

### **D.01 EVALUATION FACTORS**

Evaluation of proposals will be conducted by an evaluation committee. The evaluation committee's goal will be to identify the proposal(s) which will overall best meet the needs of Manatee County as determined from the proposals received and subsequent investigation by the County. The committee will consider the information requested in Section C for each responsive proposal submitted to ascertain the perceived ability of the proposer(s) to perform the scope of services as stated in this Request for Proposal. Once all proposals have been reviewed pursuant to the criterion in Section C, the evaluation committee will determine from the responses to this Request for Proposal and subsequent investigation as necessary, the proposer(s) most qualified to be selected to negotiate an agreement.

Unless noted, no weight is assigned to the evaluation factors.

### **D.02 REVIEW OF PROPOSERS AND PROPOSALS**

In-person reviews may be conducted with proposers who are deemed reasonably susceptible of being received for award for the purposes of assuring full understanding of: (a) conformance to the solicitation requirements, (b) the abilities of the proposer, and (c) the proposal submitted.

Proposers will be available for presentations to and interviews with the evaluation committee, upon reasonable notification from the Procurement Division. The date(s) and time(s) of any such presentations/interviews will be determined solely by County and may be closed to the public by the discretion of the Purchasing Official and to the extent permitted by law.

### **D.03 PRELIMINARY RANKING**

An evaluation committee will determine from the responses to this Request for Proposal and subsequent investigation as necessary, the proposer(s) most qualified to be selected to negotiate an agreement.

In its review, the evaluation committee may take some or all of the following actions:

- a. review all responses pursuant to the evaluation factors stated herein,
- b. short list proposers to be further considered in oral interview/presentation/product demonstrations,
- c. recommend commencement of negotiations to County Administrator,
- d. Reject all proposals received and cancel the Request for Proposal,
- e. Receive written clarification of proposal.

The evaluation committee's overarching goal is to identify the proposal which will best meet the overall needs of Manatee County as determined from the proposals received and subsequent investigation by the County.

**D.04 RECOMMENDATION FOR NEGOTIATION**

The evaluation committee will make a recommendation to the County Administrator as to the proposer which Manatee County should enter into negotiations, if any. The County Administrator will act upon that recommendation and if accepted, the Successful Proposer will be invited to enter negotiations led by Manatee County Procurement Division.

Manatee County will post the Intent to Negotiate, in the same manner the original RFP document was posted (refer to Section A.03) prior to commencing negotiations with the selected proposer(s).

**END SECTION D**

## **SECTION E:** **NEGOTIATION OF THE AGREEMENT**

### **E.01 GENERAL**

- a. The proposal will serve as a basis for negotiating an agreement, but not compel adherence to its terms or conditions.
- b. Upon submission, all proposals become the property of Manatee County which has the right to use any or all ideas presented in any proposal submitted in response to this Request for Proposal whether or not the proposal is accepted.
- c. All products and papers produced in the course of this engagement become the property of Manatee County upon termination or completion of the engagement.

### **E.02 AGREEMENT**

The selected proposer(s) will be required to negotiate an agreement in a form and with provisions acceptable to Manatee County. The County will have the option to make multiple awards as deemed necessary.

Negotiated agreements may or may not include all elements of this Request for Proposal or the resulting successful proposal where alternative terms or conditions become more desirable to Manatee County, and the parties agree to such terms.

### **E.03 AWARD**

County may not make award to a proposer who is delinquent in payment of any taxes, fees, fines, contractual debts, judgments, or any other debts due and owed to the County, or is in default on any contractual or regulatory obligation to the County. By submitting this solicitation response, proposer attests that it is not delinquent in payment of any such debts due and owed to the County, nor is it in default on any contractual or regulatory obligation to the County. In the event the proposer's statement is discovered to be false, proposer will be subject to suspension and/or debarment and the County may terminate any contract it has with proposer.

Award of an agreement is subject to the successful negotiations and the approval of either the Purchasing Official or the Board of County Commissioners (as provided for in the current Manatee County Procurement Code).

The parties will negotiate the terms and conditions of the agreement, which may or may not include renewal, assignment, termination, insurance, auditing or any other relevant contractual term and the circumstances in which it may be

renewed, assigned or terminated.

This paragraph will be used for the contract negotiator to provide any additional terms not previously mentioned.

**END SECTION E**

## ATTACHMENT A

### PROPOSAL SIGNATURE FORM REQUEST FOR PROPOSAL 16-0000XX

The undersigned acknowledges receipt of the following addendum:

Addendum No. \_\_\_\_\_ Date Received: \_\_\_\_\_ Initials: \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received: \_\_\_\_\_ Initials: \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received: \_\_\_\_\_ Initials: \_\_\_\_\_

The undersigned represents that:

- (1) by signing the proposal, that he/she has the authority and approval of the legal entity purporting to submit the proposal and any additional documentation which may be required such as the Joint Venture Agreement or Joint Venture Affidavit, if applicable;
- (2) all facts and responses set forth in the proposal are true and correct;
- (3) if the proposer is selected by County to negotiate an agreement, that the proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in the Scope of Services of this Request for Proposal;
- (4) the proposer which includes all companies included in a partnership or joint venture, is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Print or type proposer's information below:

\_\_\_\_\_  
Name of Proposer

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Web Address

\_\_\_\_\_  
Print Name & Title of Authorized Officer

\_\_\_\_\_  
Signature of Authorized Officer

\_\_\_\_\_  
Date

## ATTACHMENT B

### PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

#### SWORN STATEMENT PURSUANT TO SECTION 2-26 ARTICLE V, MANATEE COUNTY PROCUREMENT CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to Manatee County by \_\_\_\_\_  
[print individual's name and title]

For \_\_\_\_\_  
[name of entity submitting sworn statement]  
whose business address is: \_\_\_\_\_

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among proposers or prospective proposers in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Purchasing Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such an entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with



documentation satisfactory to Manatee County's Purchasing Official. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with Manatee County.

I UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE PROCUREMENT DIVISION OR THE COUNTY ADMINISTRATOR DETERMINES THAT **SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.**

\_\_\_\_\_  
[Signature]

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_\_\_ by\_\_\_\_\_.

Personally known \_\_\_\_\_ OR Produced identification \_\_\_\_\_  
[Type of identification]

\_\_\_\_\_  
Notary Public Signature      My commission expires \_\_\_\_\_

\_\_\_\_\_  
[Print, type or stamp Commissioned name of Notary Public]

**Signatory Requirement** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

## **ATTACHMENT C**

### **COMMUNITY CARE FOR THE ELDERLY HOMEMAKER SCOPE OF SERVICES**

#### **01. Background**

The Scope of Service is contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for Community Care for the Elderly Program (CCE) calls for Homemaker Service to provide a clean, safe living environment to a functionally impaired elderly person with home management for a specified period of time and to:

- a. Provide a clean, safe living environment to functionally impaired elderly persons.
- b. Provide a supply of clean clothes and linens to a functionally impaired elderly person
- c. Provide the availability of food and medicines in the home, for a functionally impaired elderly person.
- d. Prevent inappropriate institutionalization of a functionally impaired elderly person.

#### **02. Homemaker Units of Service**

Beginning January 1, 2017, Proposer shall have demonstrated the capacity to deliver, at a minimum, the following number of units for the Homemaker Service.

HOMEMAKER UNITS PER WEEK OF SERVICE: **444**

Service is to be delivered from January 1, 2017 to June 30, 2017 with a provision for the extension of the Proposal for three (3) additional twelve (12) month periods. This extension is at the discretion of the Board of County Commissioners and availability of funds, as determined by the County and the Senior Connection Center Inc.

The County incurs certain cost for transferring clients from a current contractor to a new contractor. These transfer cost are calculated as shown below and will be factored into the evaluation criteria for selection of responsive Proposers. The following is the cost to transfer Community Care for the Elderly (CCE) Homemaker clients to a new Proposer:

#### **CCE HOMEMAKER SERVICE:**

- 1) Total Active Cases (Client Files): **111**
- 2) Total Units of Homemaker Service: **1,927** per month

- 3) Total Transfer Cost: **\$2,534.15**  
(Administrative Cost of **\$21.86** Multiplied by the Number of Active Client Files)

### **Proposer Requirements and Responsibilities**

Homemaker Service is the accomplishment of specific home management duties performed by a trained homemaker worker.

Each Proposer must submit written policies and procedures for Homemaker Workers which address:

- a. Emergency procedures to be followed in the event something happens to the client when the Homemaker is in the home.
- b. Reporting changes in the client's condition or behavior to the Homemaker Supervisor, who will in turn contact the County Case Manager.
- c. Not engaging in Homemaker activities not specified in the Care Plan.
- d. Not accepting gifts from clients.
- e. Not lending nor borrowing money or articles from clients.
- f. Not giving the client the Homemaker Worker's home telephone number or address.
- g. Not administering medications.
- h. Allowing the Homemaker Worker to remind the client to take the medication at a specific time.
- i. Changing bed linens (when client is not in bed) or changing clothing when such services are essential to the client's health and comfort.
- j. Homemaker's completing written reports after each visit describing observation, general condition of the client, tasks completed and hours worked.

Each Proposer must submit written procedures for the following:

- a. Development of a computerized Daily Service Provision Log indicating activities performed by the Homemaker during the home visit and the number of hours spent performing the services with written beginning and ending times. This log should also provide for the signature of the Homemaker Worker and the client to verify that services were received.

- b. Establishment of a Homemaker's Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan submitted by the County Case Managers.
- c. Ensuring that adequate records are maintained to record and evaluate Homemaker Service for responsible fiscal management and to provide timely and accurate data or inclusion into the Client Information Registration and Tracking System (CIRTS) by the County's Community Care for the Elderly (CCE) Lead Agency; and reports in accordance with the Department of Elder Affairs requirements.

### **03. Staffing Requirements**

**Homemaker Supervisor:** A qualified health or social service professional on staff to supervise and provide pre-service and in-service training to workers providing Homemaker Service. The Homemaker Supervisor shall make home visits which include observation of service delivery to evaluate the Homemaker worker's performance and skills at least quarterly. The Homemaker Supervisor will assess whether activities in the care plan are being carried out properly, review reports and records, have telephone and personal conferences and assist in performance evaluations of Homemaker staff.

**Major Functions Homemaker Supervisor:**

- a. Provides supervision, support and assistance to Homemaker in the provision of direct services.
- b. Assists in the recruitment, screening and training of Homemaker.
- c. Assists in planning and development of an organized program of pre-service and in-service training for Homemaker.
- d. Interprets to the Homemaker their roles and responsibilities within the total program and the clients they will serve.
- e. Makes case assignments in accordance with the Homemaker skills and explains the service needs of the client being served.
- f. Maintains frequent contact with the Homemaker to explain changes in the Care Plan when they occur.
- g. Arranges for case conferences and collaborative consultation as needed or requested.
- h. Periodically evaluates the performance of each Homemaker.
- i. Ensures accurate completion of all records and reports by the Homemaker's and maintains program statistical data and records as required by the County.

### Homemaker Staff Qualifications:

- a. Be in good physical and mental health.
- b. Be mature, patient and use good judgement.
- c. Have an interest in, and concern for, people.
- d. Have a warm and pleasant personality.
- e. Have experience in home management.
- f. Have an understanding of aging and functionally impaired persons.
- g. Have an awareness of their own limitations when encountering an emergency beyond their capabilities and accept responsibility to report emergencies to the Homemaker Supervisor.
- h. Have the ability to deal with minor emergencies, to work under stress when a crisis occurs, to know when and where to seek help.
- i. Have the ability to comply with written emergency and disaster plans.
- j. Have the ability to accept and work under supervision as a member of the Homemaker staff.
- k. Have the ability to communicate by phone, in writing or in person with client, caregiver, family or persons.
- l. Have the ability to appraise the client's situation and report significant observations.
- m. Have the ability to read, comprehend and follow simple instructions. Must be able to write, to fill out weekly reports and to maintain simple statistical reports related to the service, as required.
- n. Possess understanding of and respect for confidentiality.
- o. Possess a comprehensive knowledge of the work area and community resources.
- p. Have a valid Florida Driver License and automobile insurance and reliable means of transportation.
- q. Education should be sufficient to follow written and verbal instructions and the ability to complete required reports.

### **04. Training Requirements**

**Pre-Service:** Prior to working with clients, Homemaker staff must be trained in those supportive services which are required to make the client comfortable. Each Homemaker staff member will receive a minimum of sixteen (16) class hours of pre-service training administered by a health or social service professional with specific experience in providing such training. A course outline must be submitted with the Request For Proposal covering, at a minimum, the following topics:

- a. The aging process and communication with visually and hearing impaired clients.
- b. Interpersonal relationships.
- c. First aid and handling of emergencies.
- d. Food, nutrition, meal preparation, and household management.
- e. Marketing and food storage.
- f. Use of household equipment and supplies
- g. Record keeping and reporting requirements.
- h. If Homemakers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all of the required training at the discretion of the Proposer. The personnel file of the Homemaker must include documentation of the allowable prior training.

**In-Service:** Staff providing Homemaker Service will be scheduled regularly for in-service training to augment or refresh the Homemaker's knowledge in any of the above listed areas for a minimum of four hours per contract year. Content and duration will be documented in the agency and staff personnel records.

#### **05. Special Conditions**

- a. Proposers must be appropriately licensed or registered with the Agency for Health Care Administration, Office of Licensure and Certification as applicable and required within the State of Florida. A copy of the appropriate license must be submitted with the response to this Proposal.
- b. Proposer will ensure that prior to providing services, all persons having access to vulnerable elders, their living area, funds or personal property, or protected health information pertaining to such individuals, shall pass a Level II criminal background screening in accordance with the requirements of s.430.0402 and ch. 35, F.S., as amended. The Proposer must also comply with any applicable rules promulgated by the Department of Elder Affairs and the Agency for Health Care Administration regarding implementation of s. 430.0502 and Chapter 435, F.S.

- c. Proposer must be able to begin Homemaker Service to clients within seven calendar days after notification and authorization has been made by the Case Manager. Homemaker Service shall be provided Monday through Saturday. Homemaker Service shall be provided on Sunday if requested by the Case Manager, and if approved by the Case Manager Supervisor and adequate staff are available.
- d. Units of Homemaker Service actually provided during the previous week will be telephoned by 1:00 PM the following Tuesday to the Fiscal Section of the County's Community Care for the Elderly (CCE) program.
- e. Entry level wage, for persons employed under this CCE Homemaker program to provide services, shall be equal to non CCE funded staff employed by the Proposer in the same position.
- f. Proposer shall follow incident reporting procedures set forth in DCF Regulation 0-10-1, "Unusual Incident Reporting and Follow-Up".
- g. Proposer, at its own cost and expense, shall maintain Worker's Compensation/Employers Liability as mandated by Statute, General Liability, Business Auto Liability, Professional Liability and Fidelity Bonds for all employees required to handle client's money.
- h. The Proposers must submit with their Proposal, the job description of staff providing Homemaker Service to ensure that staff involved have duties clearly described in their respective job descriptions. Education and training must be appropriate for the level of responsibilities.
- i. Proposer shall not charge Homemaker workers for any expenses incurred in order for the Proposer to meet OSHA requirements or any cost associated with obtaining the Level II Background Checks.
- j. The Proposer shall comply with all requirements of the health Insurance Portability and Accountability Act (HIPPA) of 1996 by agreeing to not use or disclose protected health information for any purpose other than what is allowable by contract to provide services to clients.

## **06. Liaison**

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the Proposal, Contract and Agreement. All activities and decisions of the Proposer shall be subject to review and approval by the County's Contract Manager.

## **07. Performance Acceptance Procedures**

During the entire duration of the Agreement, the County Contract Manager shall monitor the performance of the Proposer in terms of delivery of services, quality of services delivered, meeting scheduled time frames for implementation of services, and reviewing pre-service and in-service training requirements. The Proposer shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Proposer shall take immediate action to correct the deficiencies.



## **ATTACHMENT D**

### **COMMUNITY CARE FOR THE ELDERLY PERSONAL CARE SCOPE OF SERVICES**

#### **01. Background**

The Scope of Service is contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for the Community Care for the Elderly Program (CCE) calls for Personal Care Service to assist the functionally impaired elderly person with personal hygiene, dressing and other activities of daily living for a specified period of time and to:

- a. Maintain an elderly person's safety while bathing, grooming and/or toileting.
- b. Ensure elderly persons have a clean body and hair on a regular basis.
- c. Prevent inappropriate institutionalization of functionally impaired elderly persons.

#### **02. Personal Care Units of Service**

Beginning January 1, 2017 Proposer shall be required to deliver, at a minimum, the following number of units for the Personal Care Service.

Personal Care Units Per week: 267

Service is to be delivered from January 1, 2017 to June 30, 2017 with a provision for an extension of the Proposal for three (3) additional twelve (12) month periods. This extension is at the discretion of the County and availability of funds, as determined by the County and the Senior Connection Center, Inc.

The County incurs certain costs for transferring clients from a current contractor to a new contractor. These transfer costs are calculated as shown below and will be factored into the evaluation criteria for selection of responsive Proposers. The following is the cost to transfer Personal Care clients to a new Proposer:

##### **CCE PERSONAL CARE SERVICE:**

- a. Total Active Cases (Client Files): 89 -
- b. Total Units of Personal Care Service: 1,159 per month
- c. Total Transfer Cost: \$2,031.87  
(Administrative Cost of \$22.83 Multiplied by the Number of Active Client Files)

### **03. Proposer Requirements and Responsibilities**

Personal Care Service is the accomplishment of providing elderly clients with adequate hygiene by a trained Home health Aide or Certified Nursing Assistant. Personal Care will not be substituted for the care usually provided by a registered or licensed practical nurse or therapist.

Each Proposer must submit written policies and procedures for Personal Care Workers which address:

- a. Emergency procedures to be followed in the event something happens to the client when the Personal Care worker is in the home.
- b. Reporting changes in the client's condition or behavior to the Nurse Supervisor, who will in turn contact the County Case Manager.
- c. Not engaging in Personal Care activities not specified in the Care Plan.
- d. Not accepting gifts from clients.
- e. Not lending nor borrowing money or articles from clients.
- f. Not performing services requiring a registered or licensed practical nurse or therapist.
- g. Not giving the client the Personal Care Worker's home telephone number or address.
- h. Not administering medications.
- i. Not transporting clients.
- j. Allowing the Personal Care Worker to remind the client to take the medication at a specific time.
- k. Changing bed linens (when client is not in bed) or changing clothing when such services are essential to the client's health and comfort.
- l. Personal Care Workers completing written reports after each visit describing observation, general condition of the client, tasks completed beginning and ending hours worked and getting client signature.

Each Proposer must submit written procedures for the following:

- a. Development of a Daily Service Provision Log indicating activities performed by the Personal Care Worker during the home visit and the number of hours spent perform the service with written beginning and ending times. This log should also provide for the signature of Personal Care Worker and the client to verify that services were received.

- b. Establishment of a Personal Care Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan submitted by County Case Managers.
- c. Ensuring that adequate records are maintained to record and evaluate Personal Care Service for responsible fiscal management and to provide timely and accurate data for the inclusion into the state Client Information Registration and Tracking System (CIRTS) by the County's Aging Services staff in accordance with Department of Elder Affairs requirements.

#### **04. Staff Requirements**

Nurse Supervisor: A qualified registered nurse on staff to supervise and provide pre-service and in-service training to workers providing Personal Care Service. The Nurse Supervisor shall make home visits which include observation of service delivery to evaluate the Personal Care worker's performance and skills at least semi-annually. The Nurse Supervisor will assess whether activities in the care plan are being carried out properly, review reports and records, have telephone and personal conferences and assist in performance evaluations of Personal Care staff.

Major Functions of the Nursing Supervisor:

- a. Provides supervision, support and assistance to Personal Care workers in the provision of direct services.
- b. Assists in the recruitment, screening and training of Personal Care workers.
- c. Assists in planning and development of an organized program of pre- service and in-service training for Personal Care workers.
- d. Interprets to the Personal Care worker their roles and responsibilities within the total program and the clients they will serve.
- e. Makes case assignments in accordance with the Personal Care worker's skills and explains the service needs of the client being served. Maintains frequent contact with the Personal Care worker to explain changes in the Care Plan when they occur.
- f. Arranges for case conferences and collaborative consultation as needed or requested.
- g. Periodically evaluates the performance of each Personal Care worker.
- h. Ensures accurate completion of all records and reports by the Personal Care workers and maintains program statistical data and records as required by the County.

Personal Care Staff Qualifications:

- a. Be in good physical and mental health.

- b. Be mature, patient and use good judgment.
- c. Have an interest in, and concern for, people.
- d. Have a warm and pleasant personality.
- e. Reliable means of transportation.
- f. Have an understanding of aging and functionally impaired persons.
- g. Have an awareness of their own limitations when encountering an emergency beyond their capabilities and accept responsibility to report emergencies to the Nurse Supervisor.
- h. Have the ability to deal with minor emergencies, to work under stress when a crisis occurs, to know when and where to seek help.
- i. Have the ability to comply with written emergency and disaster plans.
- j. Have the ability to accept and work under supervision as a member of the Personal Care staff.
- k. Have the ability to communicate by phone, in writing or in person with client, caregiver, family or other authorized persons.
- l. Have the ability to appraise the client's situation and report significant observations.
- m. Have the ability to read, comprehend and follow simple instructions. Must be able to write, to fill out weekly reports and to maintain simple statistical reports related to the service, as required.
- n. Possess understanding of and respect for confidentiality.
- o. Possess a comprehensive knowledge of the work area and community resources.
- p. Have a valid Florida Driver License and automobile insurance.
- q. Education should be sufficient to follow written and verbal instructions and the ability to complete required reports.

## **05. Training Requirements**

Pre-Service: Prior to working with clients, Personal Care staff must be trained in those supportive services which are required to make the client comfortable. Each Personal Care staff member will receive pre-service training administered by the nurse supervisor or health or social service professional with specific experience in providing such training. A course outline must be submitted with the Request

for proposal covering, at a minimum, the following topics:

- a. Health problems and care of aged persons.
- b. Basic personal care procedures such as grooming.
- c. First aid and handling of emergencies.
- d. Overview of dementia.
- e. Dealing with behaviors characteristic of dementia.
- f. Record keeping and reporting requirements.
- g. If Personal Care workers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all of the required training at the discretion of the Proposer. The personnel file of the Personal Care worker must include documentation of the allowable prior training.
- h. In-Service: Staff providing Personal Care Service will be scheduled regularly for in-service training to augment or refresh the Personal Care worker's knowledge in any of the above listed areas for a minimum of four hours per contract year. Content and duration will be documented in the agency and staff personnel records.

#### **06. Special Conditions**

Proposers responding to this Request for Proposals for Personal Care Service must be appropriately licensed or registered with the Agency for Health Care Administration, Office of Licensure and Certification as applicable and required within the State of Florida. A copy of the appropriate license must be submitted with this Proposal.

Proposer will ensure that prior to providing services, all persons having access to vulnerable elders, their living area, funds or personal property, or protected health information pertaining to such individuals, shall pass a Level II criminal background screening in accordance with the requirements of s.430.0402 and ch. 435, F.S., as amended. The Proposer must also comply with any applicable rules promulgated by the Department of Elder Affairs and the Agency for health Care Administration regarding implementation of s. 430.0502 and Chapter 435, F.S.

Proposer must be able to begin Personal Care Service to clients within seven calendar days after telephone notification and authorization has been made by the Case Manager. Personal Care Service shall be provided Monday through Saturday. Personal Care Service shall be provided on Sunday if requested by the Case Manager, and if approved by the Case Manager Supervisor and adequate staff are available.

Units of Personal Care Service actually provided during the previous week will be telephoned by 1:00 PM the following Tuesday to the Fiscal Section of the County's Community Care for the Elderly (CCE)

program.

Entry level wage, for persons employed under this CCE Personal Care program to provide services, shall be equal to non CCE funded staff employed by the Proposer in the same position.

Proposer shall follow incident reporting procedures set forth in DCF Regulation 0- 10-1, "Unusual Incident Reporting and Follow-Up".

Proposer, at its own cost and expense, shall maintain Worker's Compensation Employers Liability as mandated by Statute, General Liability, Business Auto Liability, Professional Liability and Fidelity Bonds for all employees required to handle client's money.

The Proposers must submit with their Proposal, the job description of staff providing Personal Care Service to ensure that staff involved have duties clearly described in their respective job descriptions. Education and training must be appropriate for the level of responsibilities.

Proposer shall not charge Personal Care workers for any expenses incurred in order for the Proposer to meet OSHA requirements or any cost associated with obtaining the Level II Background Checks.

The Proposer shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPPA) of 1996 by agreeing to not use or disclose protected health information for any purpose other than what is allowable by contract to provide services to clients.

#### **07. Liaison**

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the Agreement. All activities and decisions of the Proposer shall be subject to review and approval by the County's Contract Manager.

#### **08. Performance Acceptance Procedures**

During the entire duration of the Agreement, the County Contract Manager shall monitor the performance of the Proposer in terms of delivery of services, quality of services delivered, meeting scheduled time frames for implementation of services, and reviewing pre-service and in-service training requirements. The Proposer shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Proposer shall take immediate action to correct the deficiencies.

## **ATTACHMENT E**

### **COMMUNITY CARE FOR THE ELDERLY RESPITE CARE SCOPE OF SERVICES**

#### **01. Background**

The Scope of Service is contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for the Community Care for the Elderly (CCE) calls for the provision of Respite Service for relief or rest from the constant/continued supervision, companionship, therapeutic and/or personal care of a functionally impaired older person for a specified period of time. The objectives of the resulting Agreement are to:

- a. Relieve the primary caregiver (relative or non-relative) of the stress and demands associated with the daily care of the functionally impaired person.
- b. Prevent or reduce inappropriate institutionalization of an impaired elderly person when the caregiver is away and other support is not readily available.
- c. Provide temporary relief and help improve or maintain the physical and mental health of the caregiver, thereby fostering a healthful living environment for both the client and caregiver.
- d. Provide care and maintenance with minimal disruption in the client's life style when the regular caregiver is out of the home.

#### **02. Respite Units of Service**

Beginning January 1, 2017, Proposer shall have demonstrated the capacity to deliver, at a minimum, the following number of units for the Respite Service.

**RESPITE UNITS PER WEEK OF SERVICE: 384**

Service is to be delivered from January 1, 2017 to June 30, 2017 with a provision for an extension of the Proposal for three (3) additional twelve (12) month periods. This extension is at the discretion of the Board of County Commissioners and availability of funds, as determined by the County and the Senior Connection Center, Inc.

The County incurs certain costs for transferring clients from a current contractor to a new contractor. These transfer costs are calculated as shown below and will be factored into the evaluation criteria for selection of responsive Proposers. The following is the cost to transfer Community Care for the Elderly Respite Care clients to a new provider:

(CCE) RESPITE SERVICE:

- a. Total Active Cases (Client Files): 25
- b. Total Units of Respite Service: 1,664 per month
- c. Total Transfer Cost: \$547.92  
(Administrative Cost of \$21.86 Multiplied by the Number of Active Client Files)

**03. Provider Requirements and Responsibilities**

Respite Service is the accomplishment of rest or relief of the primary caregiver performed by a trained Respite Care Worker. Respite care will not be substituted for the care usually provided by a registered nurse, licensed practical nurse or therapist.

Each Proposer must submit written policies and procedures for Respite Care Workers which address:

- a. Emergency procedures to be followed in the event something happens to the client when the Respite Care Worker is in the home.
- b. Reporting changes in the client's condition or behavior to the Respite Care Supervisor, who will in turn contact the County Case Manager.
- c. Not engaging in Respite Care activities not specified in the Care Plan.
- d. Not accepting gifts from clients.
- e. Not lending nor borrowing money or articles from clients.
- f. Not performing services requiring a registered or practical nurse or therapist or home health aide.
- g. Not giving the client the Respite Care Worker's home telephone number or address.
- h. Not administering medications.
- i. Allowing the Respite Care Workers to remind the client to take the medication at a specific time.
- j. Changing bed linens (when client is not in bed) or changing clothing when such services are essential to the client's health and comfort.
- k. Respite Care Workers completing written reports after each visit describing observation, general condition of the client, tasks completed and hours worked.



Each Proposer must submit written procedures for the following:

- a. Development of a computerized Daily Service Provision Log indicating activities performed by the Respite Care Worker during the home visit and the number of hours spent performing the service with written beginning and ending times.
- b. Establishment of a Respite Care Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan verify that services were received.
- c. Ensuring that adequate records are maintained to record and evaluate Respite Service for responsible fiscal management and to provide timely and accurate data, for inclusion into the Client Information Registration and Tracking System (CIRTS) by the County's Community Care for the Elderly (CCE) Lead Agency; and reports in accordance with the Department of Elder Affairs requirements.

#### **04. Staff Requirements**

**Respite Care Supervisor:** A qualified health or social service professional on staff to supervise and provide pre-service and in-service training to workers providing Respite Service. The Respite Care Supervisor shall make home visits which include observation of service delivery to evaluate the Respite Care worker's performance and skills at least quarterly. The Respite Supervisor will assess whether activities in the care plan are being carried out properly, review reports and records, have telephone and personal conferences and assist in performance evaluations of Respite Care staff.

**Major Functions:**

- a. Provides supervision, support and assistance to Respite Care workers in the provision of direct services.
- b. Assists in the recruitment, screening and training of Respite Care workers.
- c. Assists in planning and development of an organized program of pre-service and in-service training for Respite Care workers.
- d. Interprets to the Respite Care worker their roles and responsibilities within the total program and the clients they will serve.
- e. Makes case assignments in accordance with the Respite Care worker's skills and explains the service needs of the client being served.
- f. Maintains frequent contact with the Respite Care worker to explain changes in the Care Plan when they occur.
- g. Arranges for case conferences and collaborative consultation as needed or requested.
- h. Periodically evaluates the performance of each Respite Care worker.

- i. Ensures accurate completion of all records and reports by Respite Care workers and maintains program statistical data and records as required by the County.

**Respite Care Staff Qualifications:**

- a. Be in good physical and mental health.
- b. Be mature, patient and use good judgement.
- c. Have an interest in, and concern for, people.
- d. Have a warm and pleasant personality.
- e. Have a valid Florida Driver License, automobile insurance and reliable means of transportation.
- f. Have an understanding of aging and functionally impaired persons.
- g. Have an awareness of their own limitations when encountering an emergency beyond their capabilities and accept responsibility to report emergencies to the Respite Care Supervisor.
- h. Have the ability to deal with minor emergencies, to work under stress when a crisis occurs, to know when and where to seek help.
- i. Have the ability to comply with written emergency and disaster plans.
- j. Have the ability to accept and work under supervision as a member of the Respite Care staff.
- k. Have the ability to communicate by phone, in writing or in person with client, caregiver, family or persons.
- l. Have the ability to appraise the client's situation and report significant observations.
- m. Have the ability to read, comprehend and follow simple instructions. Must be able to write, to fill out weekly reports and to maintain simple statistical reports related to the service, as required.
- n. Possess understanding of and respect for confidentiality.
- o. Possess a comprehensive knowledge of the work area and community resources.

- p. Education should be sufficient to follow written and verbal instructions and the ability to complete required reports.

## **05. Training Requirements**

**Pre-Service:** Prior to working with clients, Respite Care staff must be trained in those supportive services which are required to make the client comfortable. Each Respite Care staff member will receive a minimum of thirty (30) class hours of pre-service training administered by a health or social service professional with specific experience in providing such training. A course outline must be submitted with the Request For Proposal covering, at a minimum, the following topics:

- a. Health problems and care of aged persons.
- b. Basic respite care procedures.
- c. First aid and handling of emergencies.
- d. Food, nutrition, meal preparation, and household management.
- e. Overview of Alzheimer's Disease and other related dementias.
- f. Dealing with behaviors characteristic of Alzheimer's Disease and other related dementias.
- g. Record keeping and reporting requirements.
- h. If Respite Care workers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all of the required training at the discretion of the provider. The personnel file of the Respite Care worker must include documentation of the allowable prior training.

**In-Service:** Staff providing Respite Service will be scheduled regularly for in-service training to augment or refresh the Respite Care worker's knowledge in any of the above listed areas for a minimum of four hours per contract year. Content and duration will be documented in the agency and staff personnel records.

## **06. Special Conditions**

- a. Proposers responding to this Request For Proposal for Respite Service must be appropriately licensed or registered with the Agency for Health Care Administration, Office of Licensure and Certification as applicable and required within the State of Florida. A copy of the appropriate license or Sitter/Companion registration must be submitted with the response to this Proposal.

- b. All records checks, required by the Department of Elder Affairs (DOEA), through the Florida Department of Law Enforcement (FDLE) and the State Department of Children and Family (DCF) Abuse Registry must be submitted in accordance with written guidelines for workers performing Respite Services Community Care for the Elderly (CCE).
- c. Proposer must be able to begin Respite Service to clients within seven calendar days after telephone notification and authorization has been made by the Case Manager. Respite Service shall be provided Monday through Saturday. Respite Service shall be provided on Sunday if requested by the Case Manager.
- d. Units of Respite Service actually provided during the previous week will be reported via telephone by 1:00 PM on the following Tuesday to the Fiscal Section of the County's Community Care for the Elderly (CCE) Program.
- e. Entry level wage, for persons employed under this CCE Respite Care program to provide services, shall be equal to non CCE funded staff employed by the Proposer in the same position.
- f. Proposer shall follow incident reporting procedures set forth in DCF Regulation 0-10-1, "Unusual Incident Reporting and Follow-Up".
- g. Proposer, at its own cost and expense, shall maintain Worker's Compensation/Employers Liability as mandated by Statute, General Liability, Business Auto Liability, Professional Liability and Bonds for all employees required to handle client's money.
- h. The Proposers must submit with their Proposal, the job description of staff providing Respite Service to ensure that staff involved have duties clearly described in their respective job descriptions. Education and training must be appropriate for the level of responsibilities.
- i. Proposer shall not charge Respite Care workers for any expenses incurred in order for the proposer to meet OSHA requirements or any cost associated with obtaining FDLE Background or DCF Abuse Registry Checks.
- j. The Provider shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPPA) of 1996 by agreeing to not use or disclose protected health information for any purpose other than what is allowable by contract to provide services to clients.

## **07. Liaison**

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the Proposal, Contract and Agreement. All activities and decisions of the Proposer shall be subject to review and approval by the County's Contract Manager.

**ATTACHMENT F**  
**COMMUNITY CARE FOR THE ELDERLY**  
**EMERGENCY ALERT RESPONSE**  
**SCOPE OF SERVICES**

**01. Background**

The Scope of Service is contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for the Community Care for the Elderly (CCE) calls for the provision of Emergency Alert Response (EAR) equipment to monitor frail homebound elderly persons (client).

- a. To provide twenty four (24) hour, seven (7) days a week surveillance in a waterproof portable wireless button (EAR Unit).
- b. Response to the Client generated emergency signal by the Emergency Response Center via electronic surveillance.
- c. Emergency telephone communication from the Emergency Response Center to local emergency agencies such as 911, police or fire departments who are capable of directing emergency services to the Client's home.
- d. To provide care with minimal disruption in the Client's life style so the Client may remain at home.

**02. Emergency Alert Response Units of Service**

Beginning January 1, 2017, Proposer shall have demonstrated the capacity to deliver, at a minimum, the following number of units for the Emergency Alert Response Service.

**EMERGENCY ALERT RESPONSE UNITS PER WEEK OF SERVICE: 252**

Monitoring service is to be delivered from January 1, 2017 to June 30, 2017 with provision for extension of Proposal for three (3) additional twelve (12) month periods. This extension is at the discretion of the Board of County Commissioners and the availability of funds, as determined by the County and the Senior Connection Center, Inc.

The County incurs certain cost for transferring clients from a current contractor to a new contractor. These transfer costs are calculated as shown below and will be factored into the evaluation criteria for selection of responsive Provider.

The following is the costs to transfer Community Care for the Elderly (CCE) Emergency Alert Response Service clients to a new provider:

#### CCE EMERGENCY ALERT RESPONSE SERVICE:

- a. Total Active Cases (Client Files): 36
- b. Total Units of Emergency Alert Response Service: 1,094 per month
- c. Total Transfer Cost: \$493.20

#### 03. Proposer Requirements and Responsibilities

Emergency Alert Response Service is the accomplishment of a community based electronic surveillance service which monitors the frail homebound elderly persons by means of an electronic communication link with an emergency response center.

##### Home unit equipment specifications:

- a. The home unit shall consist of a waterproof portable button, carried by the Client and a communicator, attached to the Client's existing telephone. Batteries and telephone jack installation fees are costs incurred by the Provider. All equipment is to be Federal Communication Commission (FCC) approved and both the button and communicator must have proper identification numbers.
- b. The portable button shall be capable of sending a wireless signal, up to two hundred (200) feet, to a receiver located in the communicator.
- c. The communicator shall have a receiver to receive the wireless signal, a manual button for signaling an alarm directly, a reset button for signaling the arrival of help, a digital dialer, a rechargeable battery pack with charger and timer for indicating a specified period of inactivity in the home and ten (10) hours of backup in case of a power outage.
- d. The communicator shall be attached to the telephone line and shall not interfere with the normal use of the telephone. It shall have the capability of automatically seizing the telephone line even if the adjacent telephone is off the hook, dialing the number of the Emergency Response Center and giving identifying information that indicates the person having an emergency.
- e. The communicator shall be capable of looking for a ready signal to ensure that it is on-line with the Emergency Response Center and a confirmation signal to ensure that the message has been received.

If either of these signals is not received, the communicator must be capable of hanging up and trying again until the message has been received.

- f. The system shall be useful for the visually and hearing impaired. The communicator, when activated must give visual and audible indications of the system's operation. The visual flashing light shall assist the responder to activate the reset button.
- g. The communicator shall have a timer that allows the Client to automatically activate a signal after a specified period of inactivity in the home. The timer must have the capability of being turned off manually or at set intervals and reset by activity in the home, such as when the telephone is off the hook, or when the manual reset button is pressed. Prior to sending a time-out alarm, the communicator shall be capable of giving visual and audible signals for several minutes prompting the Client to reset the timer. The unit shall be able to be turned off when the Client leaves the home without affecting other modes of operation.
- h. The communicator shall have a battery to provide at least ten (10) hours of operation in the event of a power failure. The battery shall then automatically recharge.
- i. The communicator shall have a self diagnostic program which it performs once in each twenty four (24) hour period with the Emergency Response Center with an activation required by the Client.

Twenty-four (24) hour monitoring equipment specification:

- a. The Emergency Response Center's equipment shall consist of a primary receiver, a backup receiver, a clock printer, a backup power supply and a telephone line monitor. The system shall be capable of continuing operations when a single element fails without causing a loss of a signal.
- b. The primary receiver and backup receiver shall be independent and interchangeable. Signals shall have the capability of being received and processed with only one of the receivers on-line. When a call comes into the Emergency Response Center, the receiver shall verify receipt of the message by comparing multiple transmissions. When the message is verified a confirmation signal is sent and the telephone line is released. The receivers shall have an audible signal to indicate a message is being received and a digital message shall be visibly displayed by the receiver.
- c. The printer shall be capable of printing out the time and date of the emergency signal, the Client's identification code, and emergency codes indicating active or passive alarm or responder reset.
- d. The backup power supply shall provide for in excess of six (6) hours of Emergency Response Center operation in the event of a power failure.

- e. The telephone line monitor shall be capable of giving visual and audible signals if the incoming telephone line is disconnected for more than ten (10) seconds.
- f. Proposer shall support all functions of the Home Unit as specified in paragraph 3 above.

Each Proposer must submit written procedures for the following:

- a. Procedures for performing Emergency Alert Response Services.
- b. Specific procedures when an emergency signal is received.
- c. Ensuring that adequate records are maintained to record and evaluate Emergency Alert Response Service for responsible fiscal management and to provide timely and accurate data, for inclusion into the Client Information Registration and Tracking System (CIRTS) by the County's Community Care for the Elderly (CCE) Lead Agency; and reports in accordance with Department of Elder Affairs requirements.

#### **04. Training Requirements**

Proposer shall provide pre-service training to all Emergency Response Center personnel on site in all operational aspects of the equipment, subscriber installation, equipment testing, and program implementation. Areas to be covered must be appropriate to job responsibilities. Training topics shall include but not limited to the record keeping system, emergency procedures, recognizing changes in Client's condition or behavior, job responsibilities, project policies and procedures. Pre-Service Training shall be documented in the Providers records as to content, duration and the individuals providing the training. The Proposer shall place in the employees personnel file the subjects that have been covered and the number of training hours received.

Proposer shall develop in-service training for each position which identifies the training materials, course content and number of hours to be covered. A total of four (4) hours per year of in-service training is required. Content and duration shall be documented by the Proposer in staff personnel records.

#### **05. Special Conditions**

Proposer responding to this Request for Proposal for Emergency Alert Response Service must be appropriately licensed or registered with the Department of Professional Regulation, as applicable and required within the State of Florida. A copy of the appropriate license must be submitted with the response to this Proposal.

Proposer shall maintain detailed technical materials relating to the operational aspects and program elements of the system including technical specifications, installation, equipment testing, field coordination, physical arrangement of equipment, installation of all elements, testing procedures, emergency reporting and response procedures, servicing, equipment functioning response



protocol, record keeping and reporting procedures, and written emergency procedures to be followed in the event of a crisis during the course of the monitoring.

Proposer must be able to install emergency alert units within ten (10) calendar days after authorization has been made by the Case Manager.

Proposer shall have a fully operational office, deliver monitoring service twenty four (24) hours per day, seven (7) days a week, installation service shall be Monday through Friday from 8:00 A.M. to 5:00 P.M., with sufficient staff to deliver, install, repair, monitor, supervise and administer services not later than January 1, 2017. The Proposer shall have emergency procedures whereby the Proposer can be contacted after normal working hours should an emergency arise.

Proposer shall have a staff member designated as the Emergency Alert Response (EAR) Supervisor and telephone contact person for the County Case Managers. This person shall be available from 8:00 A.M. to 5:00 P.M., Monday through Friday, excluding holidays.

Proposer shall train the Client in the operation of the EAR Unit at the time the equipment is installed in the Client's home. This shall include a demonstration and test of the EAR Unit. Written material in large print, which is easy to read, shall be given to the Client describing the use of the EAR Unit. Proposer shall have the Client sign a statement that training in the proper use of the EAR Unit was received at the time of installation. This shall be placed in the Client's folder at the Emergency Alert Response Center.

Proposer shall comply with provisions contained in Department of Children and Family (DCF) Manual 0-10-1 regarding the reporting of unusual incidents and utilize the Unusual Incident Report Form 251.

Proposer shall comply with EAR service standards pursuant to the Department of Elder Affairs Program and Services Manual Chapter III-10.

Proposer agrees that a unit of service delivered to a Client shall be documented daily, the Client's name recorded on the invoice with the monthly total of units provided to each individual Client.

Proposer shall have a person who speaks Spanish at the center or on call to respond to Spanish speaking Clients twenty four (24) hours a day, seven days a week.

The Proposer shall utilize the appeal procedures as outlined in the Department of Elder Affairs Programs and Services Manual and the CCE grant application through which providers and Clients may request a fair hearing. In each step of appeal procedure, a written response shall be mailed to the Proposer within ten (10) working days of the receipt of the request. Proposer can obtain a copy of the appeal procedures and request for a fair hearing from the County's Representative.

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the agreement.

The Proposer shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPPA) of 1996 by agreeing to not use or disclose protected health information for any purpose other than what is allowable by contract to provide services to clients.

**06. Liaison**

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the Proposal, Contract and Agreement. All activities and decisions of the Proposer shall be subject to review and approval by the County's Contract Manager.

**07. Performance Acceptance Procedures**

During the entire duration of the Agreement, the County Contract Manager shall monitor the performance of the Proposer in terms of delivery of services, quality of services delivered, meeting scheduled time frames for implementation of services, and reviewing pre-service and in-service training requirements. The Proposer shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Proposer shall take immediate action to correct the deficiencies.

## **ATTACHMENT G**

### **ALZHEIMER'S DISEASE INITIATIVE (ADI) RESPITE SCOPE OF SERVICES**

#### **01. Background**

The Scope of Service is contingent upon the availability of funds from the Senior Connection Center, Inc. The Board of County Commissioners of Manatee County, as County Lead Agency for the Alzheimer's Disease Initiative (ADI) Program calls for the provision of Respite Service for relief or rest for a primary caregiver from the constant/continued supervision, companionship, therapeutic and/or personal care of a functionally impaired older person for a specified period of time. The objective of the services are:

- a. Relieve the primary care giver (relative or non-relative) of the stress and demands associated with the daily care of the functionally impaired person.
- b. Prevent or reduce inappropriate institutionalization of an impaired elderly person when the caregiver is away and other support is not readily available.
- c. To provide temporary relief and help improve or maintain the physical and mental health of the caregiver, thereby fostering a healthful living environment for both the client and caregiver.
- d. To provide care and maintenance with minimal disruption in the client's life style when the regular caregiver is out of the home.

#### **02. ADI Respite Units of Service**

Beginning January 1, 2017 Proposer shall have demonstrated the capacity to deliver, at a minimum, the following number of units for the ADI Respite Service.

ADI Respite Units Weekly: 304

Service is to be delivered from January 1, 2017 to June 30, 2017 with a provision for an extension of the Proposal for three (3) additional twelve (12) month periods. This extension is at the discretion of the Board of County Commissioners and availability of funds, as determined by the County and the Senior Connection Center, Inc.

The County incurs certain costs for transferring clients from a current contractor to a new contractor. These transfer costs are calculated as shown below and will be factored into the evaluation criteria for selection of responsive Proposers. The following is the cost to transfer ADI Respite clients to a new Proposer:

ADI RESPITE SERVICE:

- a. Total Active Cases (Client Files): 19
- b. Total Units of ADI Respite Service: 1,319 per month
- c. Total Transfer Cost: \$433.77  
(Administrative Cost of \$22.83 Multiplied by the Number of Active Client Files)

**03. Proposer Requirements and Responsibilities**

ADI Respite Service is the accomplishment of rest or relief of the primary caregiver performed by a trained ADI Respite worker. ADI Respite will not be substituted for the care usually provided by a registered nurse, licensed practical nurse or therapist.

Each Proposer must submit written policies and procedures for ADI Respite Workers which address:

- a. Emergency procedures to be followed in the event something happens to the client when the ADI Respite worker is in the home.
- b. Reporting changes in the client's condition or behavior to the ADI Respite Supervisor, who will in turn contact the County Case Manager.
- c. Not engaging in ADI Respite activities not specified in the Care Plan.
- d. Not accepting gifts from clients.
- e. Not lending nor borrowing money or articles from clients.
- f. Not performing services requiring a registered or practical nurse or therapist or home health aide.
- g. Not giving the client the ADI Respite Worker's home telephone number or address.
- h. Not administering medications.
- i. Not transporting clients.
- j. Allowing the ADI Respite Worker to remind the client to take the medication at a specific time.

- k. Changing bed linens (when client is not in bed) or changing clothing when such services are essential to the client's health and comfort.
- l. ADI Respite Workers completing written reports after each visit describing observation, general condition of the client, tasks completed, hours worked and getting client signature.

Each Proposer must submit written procedures for the following:

- a. Development of a computerized Daily Service Provision Log indicating activities performed by the ADI Respite Worker during the home visit and the number of hours spent performing the services with written beginnings and end times. The log should also provide for the signature of the ADI Respite worker and the client to verify that services were received.
- b. Establishment of an ADI Respite Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan submitted by County Case Managers.
- c. Ensuring that adequate records are maintained to record and evaluate ADI Respite Service for responsible fiscal management and to provide timely and accurate data, for inclusion into the Client Information Registration and Tracking System (CIRTS) by the County's Aging Services staff in accordance with the Department of Elder Affairs requirements.

#### **04. Staffing requirements**

**ADI Respite Supervisor:** A qualified health or social service professional on staff to supervise and provide pre-service and in-service training to workers providing ADI Respite Service. The ADI Respite Supervisor shall make home visits which include observation of service delivery to evaluate the ADI Respite worker's performance and skills at least quarterly. The ADI Respite Supervisor will assess whether activities in the care plan are being carried out properly, review reports and records, have telephone and personal conferences and assist in performance evaluations of ADI Respite staff.

**Major Functions of the ADI Respite Supervisor:**

- a. Provides supervision, support and assistance to ADI Respite workers in the provision of direct services.
- b. Assists in the recruitment, screening and training of ADI Respite workers.
- c. Assists in planning and development of an organized program of pre-service and in-service training for ADI Respite workers.

- d. Interprets to the ADI Respite worker their roles and responsibilities within the total program and the clients they will serve.
- e. Makes case assignments in accordance with the ADI Respite worker's skills and explains the service needs of the client being served.
- f. Maintains frequent contact with the ADI Respite worker to explain changes in the Care Plan when they occur.
- g. Arranges for case conferences and collaborative consultation as needed or requested.
- h. Periodically evaluates the performance of each ADI Respite worker.
- i. Ensures accurate completion of all records and reports by ADI Respite workers and maintains program statistical data and records as required by the County.

**ADI Respite Staff Qualifications:**

- a. Be in good physical and mental health.
- b. Be mature, patient and use good judgement.
- c. Have an interest in, and concern for, people
- d. Have a warm and pleasant personality.
- e. Reliable means of transportation.
- f. Have an understanding of aging and functionally impaired persons.
- g. Have an awareness of their own limitations when encountering an emergency beyond their capabilities and accept responsibility to report emergencies to the ADI Respite Supervisor.
- h. Have the ability to deal with minor emergencies, to work under stress when a crisis occurs, to know when and where to seek help.
- i. Have the ability to comply with written emergency and disaster plans.
- j. Have the ability to accept and work under supervision as a member of the ADI Respite staff.

- k. Have the ability to communicate by phone, in writing or in person with client, caregiver, family or authorized persons.
- l. Have the ability to appraise the client's situation and report significant observations.
- m. Have the ability to read, comprehend and follow simple instructions. Must be able to write, to fill out weekly reports and to maintain simple statistical reports related to the service, as required.
- n. Possess understanding of and respect for confidentiality.
- o. Possess a comprehensive knowledge of the work area and community resources.
- p. Have a valid Florida Driver License and automobile insurance.
- q. Education should be sufficient to follow written and verbal instructions and the ability to complete required reports.

#### **05. Training Requirements**

- A. Pre-Service: Prior to working with clients, ADI Respite staff must be trained in those supportive services which are required to make the client comfortable. Each ADI Respite staff member will receive pre-service training administered by a health or social service professional with specific experience in providing such training. A course outline shall be submitted with the Request for Proposal covering, at a minimum, the following:
  - a. Health problems and care of aged persons.
  - b. Basic personal care procedures such as grooming.
  - c. First aid and handling of emergencies.
  - d. Overview of Alzheimer's Disease and other related dementias.
  - e. Dealing with behaviors characteristic of Alzheimer's Disease and other related dementias.
  - f. Record keeping and reporting requirements.
  - g. If ADI Respite workers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all of the required training at the discretion of the Proposer. The personnel file of the ADI Respite worker must include documentation of the allowable prior training.

In-Service: Staff providing ADI Respite Service will be scheduled regularly for in-service training to augment or refresh the ADI Respite worker's knowledge in any of the above listed areas for a minimum of four hours per contract year. Content and duration will be documented in the agency and staff personnel records.

**06. Special Conditions**

- a. Proposer responding to the RFP for ADI Respite Services must be appropriately licensed or registered with the Agency for Health Care Administration, Office of Licensure and Certification as applicable and required within the State of Florida. A copy of the appropriate license or must be submitted with the response to this Proposal.
- b. Proposer will ensure that prior to providing services, all persons having access to vulnerable elders, their living area, funds or personal property, or protected health information pertaining to such individuals, shall pass a level II criminal background screening in accordance with the requirements of s. 430.0402 and ch. 435, F.S., as amended. The Proposer must also comply with any applicable rules promulgated by the Department of Elder Affairs and the Agency for Health Care Administration regarding implementation of s. 430.0502 and Chapter 435, F.S.
- c. Proposer must be able to begin ADI Respite Service to clients within seven calendar days after notification and authorization has been made by the Case Manager. ADI Respite Service shall be provided Monday through Saturday. ADI Respite Service shall be provided on Sunday if requested by the Case Manager, and if approved by the Case Manager Supervisor and adequate staff are available.
- d. Units of ADI Respite Service actually provided during the previous week will be telephoned by 1:00 PM the following Tuesday to the Fiscal Section of the County's Alzheimer's Disease Initiative (ADI) program.
- e. Entry level wage, for persons employed under this ADI Respite program to provide services, shall be equal to non ADI funded staff employed by the Proposer in the same position.
- f. Proposer shall follow incident reporting procedures set forth in DCF Regulation 0-10-1, "Unusual Incident Reporting and Follow-Up".
- g. Proposer, at its own cost and expense, shall maintain Worker's Compensation Employers Liability as mandated by Statute, General Liability, Business Auto Liability, Professional Liability and Fidelity Bonds for all employees required to handle client's money.
- h. The Proposers must submit with their Proposal, the job description of staff providing Homemaker Service to ensure that staff involved have duties clearly described in their respective job descriptions. Education and training must be appropriate for the level of responsibilities.



- i. Proposer shall not charge ADI Respite workers for any expenses incurred in order for the Proposer to meet OSHA requirements or any cost associated with obtaining the Level II Background checks.
- j. The Proposer shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPPA) of 1996 by agreeing to not use or disclose protected health information for any purpose other than what is allowable by contract to provide services to clients.

#### **07. Liaison**

The Proposer shall be fully responsible for carrying out all functions assigned to it by the County under the terms of the Proposal, Contract and Agreement. All activities and decisions of the Proposer shall be subject to review and approval by the County's Contract Manager.

#### **08. Performance Acceptance Procedures**

During the entire duration of the Agreement, the County Contract Manager shall monitor the performance of the Proposer in terms of delivery of services, quality of services delivered, meeting scheduled time frames for implementation of services, and reviewing pre-service and in-service training requirements. The Proposer shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Proposer shall take immediate action to correct the deficiencies.