

RFP No. 20-TA003485SB
ALZHEIMER'S DISEASE INITIATIVE
(ADI) RESPITE, COMMUNITY CARE
FOR THE ELDERLY (CCE)
HOMEMAKER, PERSONAL CARE,
AND RESPITE SERVICES
(952-40)
OCTOBER 16, 2020

Manatee County BCC
Procurement Division
1112 Manatee Avenue West Suite 803
Bradenton, FL 34205
purchasing@mymanatee.org



ADVERTISEMENT

REQUEST FOR PROPOSALS No. 20-TA003485SB

ALZHEIMER'S DISEASE INITIATIVE (ADI) RESPITE, COMMUNITY CARE FOR THE ELDERLY (CCE) HOMEMAKER, PERSONAL CARE AND RESPITE SERVICES

Manatee County, a political subdivision of the State of Florida (hereinafter referred to as County) will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida (Proposers), to provide Alzheimer's Disease Initiative (ADI) Respite, Community Care for the Elderly (CCE) Homemaker, Personal Care, and Respite Services, as specified in this Request for Proposals to include multiple services to assist the functionally impaired elderly.

DATE, TIME AND PLACE DUE

The Due Date and Time for submission of Proposals in response to this RFP is **November 19, 2020 at 2:00 P.M. ET**. Proposals must be delivered to the following location: Manatee County Administration Building, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205 prior to the Due Date and Time.

SOLICITATION INFORMATION CONFERENCE

There is no Solicitation Information Conference for this Request for Proposals.

DEADLINE FOR QUESTIONS AND CLARIFICATION REQUESTS

The deadline to submit all questions, inquiries, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Procurement Division is **October 30, 2020**. Questions and inquiries should be submitted via email to the Designated Procurement Contact shown below.

Important: A prohibition of lobbying is in place. Review Section A.12 carefully to avoid violation and possible sanctions.

DESIGNATED PROCUREMENT CONTACT: Stacia Branco, Senior Procurement Agent

(941) 749-3041, Fax (941) 749-3034

Email: stacia.branco@mymanatee.org

Manatee County Financial Management Department

Procurement Division

AUTHORIZED FOR RELEASE:

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SECTION A, INSTRUCTIONS TO PROPOSERS

In order to receive consideration, Proposers must meet the minimum qualification requirements and comply with the following instructions. Proposals will be accepted from a single business entity, joint venture, partnership or corporation.

A.01 PROPOSAL DUE DATE

The Due Date and Time for submission of Proposals in response to this Request for Proposals (RFP) is **November 19, 2020 at 2:00 P.M. ET**. Proposals must be delivered to the following location: Manatee County Administration Building, 1112 Manatee Ave. W., Suite 803, Bradenton, FL 34205 and be time stamped by a Procurement representative prior to the Due Date and Time. Proposals will be opened immediately following the Due Date and Time at the Manatee County Administration Building, Suite 803.

Proposal(s) received after the Due Date and Time will not be considered. It will be the sole responsibility of the Proposer to deliver its proposal to the Manatee County Procurement Division for receipt on or before the Due Date and Time. If a proposal is sent by U.S. Mail, courier or other delivery services, the Proposer will be responsible for its timely delivery to the Procurement Division. Proposals delayed in delivery 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 PUBLIC OPENING OF PROPOSALS

Sealed Proposals will be publicly opened at Manatee County Administration Procurement Division, 1112 Manatee Avenue West, 8th Floor, Suite 803, Bradenton, Florida 34205, in the presence of County officials immediately upon expiration of the Due Date and Time. Interested parties may attend the proposal opening virtually by accessing the link below:

Zoom webinar link® <https://manateecounty.zoom.us/j/88284478637>

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

A.03 SUBMISSION OF PROPOSALS

The contents of the proposal sealed package must include:

- One (1) bound original clearly identifying Proposer and marked "ORIGINAL".
- One (1) electronic format copy(s) clearly identifying Proposer.

Electronic format copies should be submitted on separate Universal Serial Bus (USB) portable flash memory drives or compact disc (CD) in Microsoft Office® or Adobe

Acrobat® portable document format (PDF) **in one file that includes all required TAB sections shown in Exhibit 2 in a continuous file.** Do not submit electronic format proposal with separate files for each TAB section. Do not password protect or otherwise encrypt electronic proposal copies. Electronic copies must contain an identical proposal to the ORIGINAL.

Submit the proposal package in a sealed container with the following information clearly marked on the outside of the package: RFP No. 20-TA003485SB, Alzheimer's Disease Initiative (ADI) Respite, Community Care for the Elderly (CCE) Homemaker, Personal Care and Respite Services, Proposer's name, and Proposer's address. Proposals must be received by the Manatee County Procurement Division prior to the Due Date and Time at the following address:

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

A.04 ORGANIZATION OF PROPOSALS

Proposals must be organized and arranged with tabs in the same order as listed in the subsections within Exhibit 2 identifying the response to each specific item.

Proposals must clearly indicate the legal name, address and telephone number of the Proposer. Proposals must be signed by an individual authorized to make representations for the Proposer.

A.05 DISTRIBUTION OF SOLICITATION DOCUMENTS

All documents issued pursuant to this RFP are distributed electronically and available for download at no charge at www.mymanatee.org > *Bids and Proposals*. This link is located on the left side of the County website home page. Documents may be viewed and downloaded for printing using Adobe Reader® software.

At its sole discretion, the County may utilize a third-party provider, to distribute proposals. Visit the third-party's website for more information regarding this service. Participation in the third-party system is not a requirement for doing business with Manatee County.

Additionally, the RFP and all related documents are available for public inspection at the Manatee County Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205. Call (941) 749-3014 to schedule an appointment. Documents are available between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday, with the exception of County holidays.

As a courtesy, Manatee County notifies the Manatee County Chamber of Commerce and the Manasota Black Chamber of Commerce of all active solicitations, who then distributes the information to its members.

A.06 ADDENDA

Any interpretations, corrections or changes to this RFP will be made by addenda. Addenda will be posted on the Procurement Division's web page of the County website at <http://www.mymanatee.org/purchasing> > *Bids and Proposals*. For those solicitations that are advertised on a third-party distribution system, addenda will also be posted on the third-party distribution system on the 'Planholders' link.

All addenda are a part of the RFP and each Proposer will be bound by such addenda. It is the responsibility of each Proposer to read and comprehend all addenda issued. Failure of any Proposer to acknowledge an issued addendum in its Proposal will not relieve the Proposer from any obligation contained therein.

A.07 PROPOSAL EXPENSES

All costs incurred by Proposer in responding to this RFP and to participate in any interviews/presentations/demonstrations, including travel, will be the sole responsibility of the Proposer.

A.08 QUESTION AND CLARIFICATION PERIOD

Each Proposer shall examine all RFP documents and will judge all matters relating to the adequacy and accuracy of such documents. Any questions or requests concerning interpretation, modification, clarification or additional information pertaining to this RFP shall be made in writing via email to the Manatee County Procurement Division to the Designated Procurement Contact or to purchasing@mymanatee.org. All questions received and responses given will be provided to potential Proposers via an addendum to this RFP.

If the Proposer requests modifications to the RFP documents, the Proposer must provide detailed justification for each modification requested. The County will determine what changes will be acceptable to the County and changes approved by the County will be issued in a written addendum.

Manatee County will not be responsible for oral interpretations given by other sources including County staff, representative, or others. The issuance of a written addendum by the Procurement Division is the only official method whereby interpretation, clarification or additional information will be given.

A.09 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 the County, such information was intended to mislead the County in its evaluation of the proposal, and the attribute, condition or capability is a requirement of this RFP such Proposer will be disqualified from consideration for this RFP and may be disqualified from submitting a response on future solicitation opportunities with the County.

A.10 WITHDRAWAL OR REVISION OF PROPOSALS

Proposers may withdraw Proposals under the following circumstances:

- a. If Proposer discovers a mistake(s) prior to the Due Date and Time. Proposer may withdraw its proposal by submitting a written notice to the Procurement Division. The notice must be received in the Procurement Division prior to the Due Date and Time for receiving proposals. A copy of the request shall be retained, and the unopened proposal returned to the Proposer; or
- b. After the Proposals are opened but before a contract is signed, Proposer alleges a material mistake of fact if:
 1. The mistake is clearly evident in the solicitation document; or
 2. Proposer submits evidence which clearly and convincingly demonstrates that a mistake was made in the Proposal. Request to withdraw a Proposal must be in writing and approved by the Procurement Official.

A.11 JOINT VENTURES

Proposers intending to submit a proposal as a joint venture with another entity are required to have filed proper documents with the Florida Department of Business and Professional Regulation and all other State or local licensing agencies as required by Florida Statute Section 489.119, prior to the Due Date and Time.

A.12 LOBBYING

After the issuance of any solicitation, no prospective Proposers, or their agents, representatives or persons acting at the request of such Proposers, shall contact, communicate with or discuss any matter relating in any way to the solicitation with any County officers, agents or employees, other than the Procurement Official or designee, unless otherwise directed by the Procurement Official or designee. This prohibition includes copying such persons on written communications (including email correspondence) but does not apply to presentations made to evaluation committees or at a County Commission meeting where the Commission is considering approval of a proposed contract/purchase order. This requirement ends upon final execution of the contract/purchase order or at the time the solicitation is cancelled. Violators of this

prohibition will be subject to sanctions as provided in the Manatee County Code of Ordinances Section 2-26-31 and 2-26-32. Sanctions may include (a) written warning; (b) termination of contracts; and (c) debarment or suspension.

A.13 EXAMINATION OF PROPOSALS

The examination and evaluation of the proposals submitted in response to this solicitation generally requires a period of not less than ninety (90) calendar days from the Due Date and Time.

A.14 ERRORS OR OMISSIONS

Once a proposal is opened, the County will not accept any request by Proposer to correct errors or omissions in the proposal other than as identified in paragraph A.10.

A.15 DETERMINATION OF RESPONSIBLENESS AND RESPONSIVENESS

The County will conduct a due diligence review of all proposals received to determine if the Proposer is responsible and responsive.

To be responsive a Proposer must submit a proposal that conforms in all material respects to the requirements of this RFP and contains all the information, fully completed attachments and forms, and other documentation required. Proposals that are deemed non-responsive will not be considered or evaluated.

To be responsible, a Proposer must meet the minimum qualification requirements and have the capability to perform the Scope of Services contained in this RFP. Proposals submitted by Proposers that are deemed non-responsible will not be considered or evaluated.

A.16 RESERVED RIGHTS

The County reserves the right to accept or reject any and all proposals, to waive irregularities and technicalities, to request additional information and documentation, and to cancel this solicitation at any time prior to execution of the contract. In the event only one proposal is received, the County reserves the right to negotiate with the Proposer. The County reserves the right to award the contract to a responsive and responsible Proposer which in its sole determination is the best value and in the best interests of the County.

The County reserves the right to conduct an investigation as it deems necessary to determine the ability of any Proposer to perform the work or service requested. Upon request by the County, Proposer shall provide all such information to the County. Additional information may include, but will not be limited to, current financial statements prepared in accordance with generally accepted accounting practices and

certified by an independent CPA or official of Proposer; verification of availability of equipment and personnel; and past performance records.

A.17 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 contract. This solicitation process will be conducted in accordance with Manatee County Code of Ordinances, Chapter 2-26.

A.18 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 its proposal for any sales or service taxes.

The successful Proposer will be responsible for the payment of taxes of any kind, 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.

A.19 SCRUTINIZED COMPANIES

Pursuant to Florida Statute Section 287.135, as of July 1, 2012, a company that, at the time of submitting a response for a new contract or renewal of an existing contract, is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Florida Statute Section 215.473, is ineligible for, and may not submit a response for or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.

A.20 COLLUSION

Proposer certifies that its Proposal is made without prior understanding, agreement, or connection with any other corporation, firm or person submitting a Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud.

Any such violation may result in contract cancellation, return of materials or discontinuation of services and the possible removal of Proposer from participation in future County solicitations for a specified period.

The County reserves the right to disqualify a Proposer during any phase of the solicitation process and terminate for cause any resulting contract upon evidence of collusion with intent to defraud on the part of the Proposer.

A.21 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 RFP, and may also be disqualified from submitting any future bids or proposals to supply goods or services to Manatee County.

A.22 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, 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 Procurement 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 C and submit with its Proposal.

A.23 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.24 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.25 MINORITY AND/OR DISADVANTAGED BUSINESS ENTERPRISE

The State of Florida Office of Contractor Diversity provides the certification process and maintains the database of certified MBE/DBE firms. Additional information may be obtained at

https://www.dms.myflorida.com/agency_administration/office_of_Contractor_diversity_osd/get_certified.

A.26 DISCLOSURE

Upon receipt, all inquiries and responses to inquiries related to this Request for Proposal 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.

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 the 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 of rejection of all proposals.

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

- a. Keep and maintain public records required by public agency to perform the service. 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 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.
- 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 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 County, upon request from County's custodian of public records, in a format that is compatible with the information technology systems of 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:

PHONE: (941) 742-5845

EMAIL: DEBBIE.SCACCIAOCE@MYMANATEE.ORG

ATTN: RECORDS MANAGER

1112 MANATEE AVENUE WEST

BRADENTON, FL 34205

A.27 TRADE SECRETS

Manatee County is subject to Chapter 119, Florida Statutes. Therefore, all documents, materials, and data submitted as part of a Proposal in response to a Request for Proposal are governed by the disclosure, exemption and confidentiality provisions relating to public records in Florida Statutes.

Notwithstanding any other provision in this solicitation, designation of the entire proposal as trade secret, proprietary, or confidential, is not permitted and may result in a determination that the Proposal is non-responsive and therefore the proposal will not be evaluated or considered.

Except for materials that are ‘trade secrets’ as defined by Chapter 812, Florida Statutes, ownership of all documents, materials and data submitted as part of a Proposal in response to the Request for Proposal shall belong exclusively to 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 segregated from the portions of the Proposal that are not declared as trade secret. In addition, Proposer shall cite, for each trade secret claimed, the Florida Statute number which supports the designation. Further, Proposer shall offer a brief written explanation as to why the cited Statute is applicable to the information claimed as trade secret.

Additionally, Proposer shall provide a hard copy of its Proposal that redacts all information designated as trade secret.

In conjunction with trade secret designation, Proposer acknowledges and agrees that:

1. Trade secret requests made after the opening will not be considered. However, County reserves the right to clarify the Proposers request for trade secret at any time; and
2. County and its officials, employees, agents, and representatives are hereby granted full rights to access, view, consider, and discuss the information designated as trade secret throughout the evaluation process and until final execution of any awarded purchase order or contract; and
3. That after notice from County that a public records request has been made pursuant to Proposer’s proposal, the Proposer at its sole expense, shall be responsible for defending its determination that submitted material is a trade secret and is not subject to disclosure. Action by Proposer in response to notice from the County 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.

Proposer shall indemnify and hold 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 County's non-disclosure of the trade secret materials.

A.28 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):
 - i. A Security System Plan or portion thereof for any property owned by or leased to County or any privately owned or leased property held by County.
 - ii. 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 County.
 - iii. 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 County.
- b. Successful Proposer agrees that, as provided by Florida Statute, it shall not, as a result of a public records request, or for 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 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 administrator who shall coordinate County's response to the request.

A.29 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 RFP, the successful Proposer commits that all employees and subcontractors will undergo e-verification before placement on this contract.

The successful Proposer shall maintain sole responsibility for the actions of its employees and subcontractors. For the life of the contract, all employees and new employees brought in after contract award shall be verified under the same requirement stated above.

A.30 LICENSES AND PERMITS

The successful Proposer shall be solely responsible for obtaining all necessary license and permit fees, including, but not limited to, all license fees, permit fees, impact fees, or inspection fees, and responsible for the costs of such fees. Successful Proposer is solely responsible for ensuring all work complies with all Federal, State, local, and Manatee County ordinances, orders, codes, laws, rules, regulations, directives, and guidelines.

A.31 HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA)

Any person or entity that performs or assists the County with a function or activity involving the use or disclosure of “individually identifiable health information (IIHI) and/or Protected Health Information (PHI) shall comply with the Health Insurance Portability and Accountability Act (HIPAA) of 1996. HIPAA mandates for privacy, security, and electronic transfer standards include, but are not limited to:

- a. Use of information only for performing services required by the contract or as required by law;
- b. Use of appropriate safeguards to prevent non-permitted disclosures;
- c. Reporting to the County any non-permitted use or disclosure;
- d. Assurances that any agents and subcontractors agree to the same restrictions and conditions that apply to the Proposer and reasonable assurances that IIHI/PHI will be held confidential;
- e. Making PHI available to the customer;
- f. Making PHI available to the customer for review and amendment, and incorporating any amendments requested by the customer;

- g. Making PHI available to the County for an accounting of disclosures; and making internal practices, books, and records related to PHI available to the County for compliance audits.

PHI shall maintain its protected status regardless of the form and method of transmission (paper records and/or electronic transfer of data). The selected Proposer must give its customers written notice of its privacy information practices, including specifically, a description of the types of uses and disclosures that would be made with protected health information.

A.32 BINDING OFFER

Proposals will remain valid for a period of 120 days following the Due Date and Time and will be considered a binding offer to perform the required services and/or provide the required goods. The submission of a Proposal will be taken as prima facie evidence that the Proposer has familiarized itself with the contents of this Solicitation.

A.33 PROTEST

Any actual bidder, proposer, or contractor who is aggrieved in connection with the notice of intent to award of a contract with a value greater than \$250,000 where such grievance is asserted to be the result of a violation of the requirements of the Manatee County Procurement Code or any applicable provision of law by the officers, agents, or employees of the County, may file a protest to the Procurement Official.

Protest must be in writing and delivered via email at purchasing@mymanatee.org or by hand delivery to the Procurement Division at 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205 by 5:00 p.m. on the fifth business day following the date of posting of the Notice of Intent to Award on the County website. There is no stay of the procurement process during a protest. The Procurement Official shall have the authority to settle and resolve a protest concerning the intended award of a contract.

For additional information regarding the County protest process, visit the Procurement Division webpage on the County website.

A.34 ACCESSIBILITY

The County is committed to making its documents and information technologies accessible to individuals with disabilities by meeting the requirements of Section 508 of the Rehabilitation Act and best practices (W3C WCAG 2). **For assistance with accessibility regarding this solicitation, contact the Manatee County Procurement Division via email at purchasing@mymanatee.org or by phone at 941-748-4501, X3014.**

Successful Proposer shall ensure all its electronic information, documents, applications, reports, and deliverables required under the Agreement are in a format that meets the requirements of Section 508 of the Rehabilitation Act and best practices (W3C WCAG 2).

Where not fully compliant with these requirements and best practices, Successful Proposer shall provide clear points of contact for each document and information technology to direct users in how to obtain alternate formats. Further, successful Proposer shall develop accommodation strategies for those non-compliant resources and implement strategies to resolve the discrepancies.

A.35 PURCHASING COOPERATIVE

It is the intent of this RFP to include requirements and to obtain proposals on behalf of Manatee County. Further it authorizes entities belonging to the Sarasota Bay Area Chapter of NIGP to obtain goods and services utilizing the terms, conditions and pricing of this RFP. This opportunity is also made available to all public agencies, pursuant to their own governing laws, and subject to the agreement of the supplier. Manatee County will not be financially responsible for the purchases of other public agencies utilizing this RFP and any resulting contract or purchase order.

A.36 SOLICITATION SCHEDULE

The following schedule has been established for this Solicitation process. Refer to the County's website (www.mymanatee.org > Online Services > *Bids & Proposals*) for meeting locations and updated information pertaining to any revisions to this schedule.

Scheduled Item	Scheduled Date
No Information Conference has been scheduled for this solicitation	N/A
Question and Clarification Deadline	October 30, 2020 at 5:00 PM., ET
Final Addendum Posted	TBD
Proposal Due Date and Time	November 19, 2020 by 2:00 P.M., ET
Technical Evaluation Meeting	TBD
Interviews, if conducted	TBD
Final Technical Evaluations	TBD

Projected Award	TBD
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END SECTION A

SECTION B, EVALUATION OF PROPOSALS

B.01 EVALUATION

Evaluation of proposals will be conducted by an evaluation committee. Each evaluation committee member will evaluate, score and rank the proposals for each of the evaluation criteria.

The committee may final rank Proposals without conducting interviews, presentations, and/or demonstrations with Proposers. Therefore, each Proposer must ensure that its proposal contains all the information requested in this RFP and reflects Proposer's best offer.

The committee will consider all information submitted by each responsible and responsive Proposer, clarification information provided by Proposer, information obtained during the interview/presentation/demonstration, feedback received from Proposer's references, and any other relevant information received during any investigation of Proposer, to ascertain the ability of the Proposer(s) to perform the scope of services as stated in this RFP.

B.02 EVALUATION CRITERIA

The following evaluation criteria have been established for this RFP.

Criteria	Maximum Weight
Proposer & Team's Experience	25
Capacity	35
Approach	35
Interviews (If applicable)	5

B.03 CLARIFICATIONS/INTERVIEWS /PRESENTATIONS/ DEMONSTRATIONS

As part of the evaluation process the evaluation committee may request additional information or clarification from Proposers for the purpose of further evaluation of (a) conformance to the solicitation requirements, (b) the abilities of the Proposer, and (c) understanding of the proposal submitted. Additional information and/or clarification must be submitted by Proposer within the requested time-period.

Additionally, interviews, presentations and/or demonstrations may be conducted with Proposers as part of the evaluation process. If conducted, the evaluation committee will

make a determination of those proposals that are deemed by the committee as having a reasonable probability of being selected for award. The Proposers for this ‘short-list’ of proposals will be invited to meet with the committee. Proposers shall make arrangements to attend the interviews, presentations and/or demonstrations if invited. The interviews, presentations and/or demonstrations are closed to the public to the extent permitted by law.

The evaluation committee may final rank proposals without conducting clarifications, interviews, presentations and/or demonstrations. Therefore, each Proposer must ensure that its proposal contains all the information requested.

B.04 BEST AND FINAL OFFER (BAFO)

The County may request a BAFO if additional information or modified proposals are necessary for the evaluation committee to complete its evaluation and ranking. The information received from the BAFO will be used by the evaluation committee to re-evaluate and re-rank the Proposers.

B.05 RANKING OF PROPOSALS

The evaluation committee will determine from the responses to this RFP and subsequent investigation as necessary, the Proposer(s) whose proposal(s) best meet the County’s requirements and recommend the County enter into negotiations for an agreement.

In its review, the evaluation committee may take 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.

END SECTION B

SECTION C, NEGOTIATION OF THE AGREEMENT

C.01 GENERAL

- a. The proposal will serve as a basis for negotiating an agreement.
- 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 by Proposer and submitted to the County during the solicitation process become the property of Manatee County.

C.02 NEGOTIATION

The evaluation committee will make a recommendation as to the Proposer which the County should enter into negotiations, if any. Upon approval of the recommendation, the successful Proposer will be invited to enter negotiations led by the County Procurement Division. These negotiations are generally relative to the scope of work/services to be provided and any associated costs.

The County will publicly notice the Intent to Negotiate prior to commencing negotiations as required by law and policy.

C.03 RECOMMENDATION FOR AWARD

Upon successful completion of negotiations, a recommendation for award to the successful Proposer(s) will be presented for approval per County ordinances, policies and procedures.

C.04 AGREEMENT

The successful Proposer(s) will be required to enter into an agreement, agreement may, or may not, include all elements of this RFP or the resulting successful Proposer's Proposal where alternatives provide best value, are desirable to the County, and the parties agree to such terms.

C.05 AWARD

The County does 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 County, or is in default on any contractual or regulatory obligation to County. By submitting this solicitation response, Proposer attests that it is not delinquent in payment of any such debts due and owed to County, nor is it in default on any contractual or regulatory obligation to County. In the event the Proposer's statement is discovered to be false, Proposer will be subject to suspension and/or debarment and County may terminate any contract it has with Proposer.

Award of an agreement is subject to the approval of either the Procurement Official or the Board of County Commissioners, as provided for in the current Manatee County Procurement Code.

END SECTION C

ATTACHMENT A, ACKNOWLEDGMENT OF ADDENDA
RFP No. 20-TA003485SB

The undersigned acknowledges receipt of the following addenda:

Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:

Print or type Proposer's information below:

_____ Name of Proposer	_____ Telephone Number
_____ Street Address	_____ City/State/Zip
_____ Email Address	_____ Website Address
_____ Print Name & Title of Authorized Officer	_____ Signature of Authorized Official Date

ATTACHMENT B, PROPOSAL SIGNATURE FORM
RFP No. 20-TA003485SB

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 Proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in the Scope of Services of this RFP;
- (4) by submitting a proposal and signing below, the Proposer agrees to all terms and conditions in this RFP, which incorporates all addenda, appendices, exhibits, and attachments, in its entirety, and is prepared to sign the Contract as written. The Respondent understands that if it submits exceptions to the Contract in its Response, the Respondent's Response may be determined non-responsive; and
- (5) 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	_____ City/State/Zip
_____ Email Address	_____ Web Address
_____ Print Name & Title of Authorized Officer	_____ Signature of Authorized Officer Date

**ATTACHMENT C, PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES
CERTIFICATION
RFP No. 20-TA003485SB**

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

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 and 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 of Contractor Representative

STATE OF _____

COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 20____ by _____
_____. ☐ Personally known OR ☐ Produced the following
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 D, INSURANCE AND BOND REQUIREMENTS

RFP No. 20-TA003485SB

The CONTRACTOR will not commence work under the resulting Agreement until all insurance coverages indicated by an “X” herein have been obtained. The CONTRACTOR shall obtain and submit to the Procurement Division within ten (10) calendar days from the date of notice of intent to award, at its expense, the following minimum amounts of insurance (inclusive of any amounts provided by an umbrella or excess policy): Work under this Agreement cannot commence until all insurance coverages indicated herein have been obtained on a standard ACORD form (inclusive of any amounts provided by an umbrella or excess policy):

☒ **Automobile Liability Insurance Required Limits**

Coverage must be afforded under a per occurrence policy form including coverage for all owned, hired and non-owned vehicles for bodily injury and property damage of not less than:

- \$1,000,000 Combined Single Limit; OR
- \$ 500,000 Bodily Injury and \$500,000 Property Damage
- \$10,000 Personal Injury Protection (No Fault)
- \$500,000 Hired, Non-Owned Liability
- \$10,000 Medical Payments

This policy shall contain severability of interests’ provisions.

☒ **Commercial General Liability Insurance Required Limits** (per Occurrence form only; claims-made form is not acceptable)

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name ‘Manatee County, a political subdivision of the State of Florida’ as an Additional Insured, and include limits not less than:

- \$1,000,000 Single Limit Per Occurrence
- \$2,000,000 Aggregate
- \$1,000,000 Products/Completed Operations Aggregate
- \$1,000,000 Personal and Advertising Injury Liability
- \$50,000 Fire Damage Liability
- \$10,000 Medical Expense, and
- \$1,000,000, Third Party Property Damage
- \$ Project Specific Aggregate (Required on projects valued at over \$10,000,000)

This policy shall contain severability of interests’ provisions.

☒ **Employer’s Liability Insurance**

Coverage limits of not less than:

- \$100,000 Each Accident
- \$500,000 Disease Each Employee
- \$100,000 Disease Policy Limit

- ☒ Worker's Compensation Insurance
- ☐ **US Longshoremen & Harbor Workers Act**
- ☐ **Jones Act Coverage**

Coverage limits of not less than:

- Statutory workers' compensation coverage shall apply for all employees in compliance with the laws and statutes of the State of Florida and the federal government.
- If any operations are to be undertaken on or about navigable waters, coverage must be included for the US Longshoremen & Harbor Workers Act and Jones Act.

Should 'leased employees' be retained for any part of the project or service, the employee leasing agency shall provide evidence of Workers' Compensation coverage and Employer's Liability coverage for all personnel on the worksite and in compliance with the above Workers' Compensation requirements. NOTE: Workers' Compensation coverage is a firm requirement. Elective exemptions are considered on a case-by-case basis and are approved in a very limited number of instances.

☐ **Aircraft Liability Insurance Required Limits**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Each Occurrence Property and Bodily Injury with no less than \$100,000 per passenger each occurrence or a 'smooth' limit.
- \$ General Aggregate.

☐ **Un-Manned Aircraft Liability Insurance (Drone)**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Each Occurrence Property and Bodily Injury; Coverage shall specifically include operation of Unmanned Aircraft Systems (UAS), including liability and property damage.
- \$ General Aggregate

☐ **Installation Floater Insurance**

When the contract or agreement **does not** include construction of, or additions to, above ground building or structures, but does involve the installation of machinery or equipment, Installation Floater Insurance shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- 100% of the completed value of such addition(s), building(s), or structure(s)

☒ **Professional Liability and/or Errors and Omissions (E&O) Liability Insurances**

Coverage shall be afforded under either an occurrence policy form or a claims-made policy form. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

- \$ 1,000,000 Bodily Injury and Property Damage Each Occurrence
- \$ 1,000,000 General Aggregate

☐ **Builder's Risk Insurance**

When the contract or agreement includes the construction of roadways and/or the addition of a permanent structure or building, including the installation of machinery and/or equipment, Builder's Risk Insurance shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- An amount equal to 100% of the completed value of the project, or the value of the equipment to be installed
- The policy shall not carry a self-insured retention/deductible greater than \$10,000

Coverage shall be for all risks and include, but not be limited to, storage and transport of materials, equipment, supplies of any kind whatsoever to be used on or incidental to the project, theft coverage, and Waiver of Occupancy Clause Endorsement, where applicable.

☐ **Cyber Liability Insurance**

Coverage shall comply with Florida Statute 501.171, shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County, a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Security Breach Liability
- \$ Security Breach Expense Each Occurrence
- \$ Security Breach Expense Aggregate
- \$ Replacement or Restoration of Electronic Data
- \$ Extortion Threats
- \$ Business Income and Extra Expense
- \$ Public Relations Expense

NOTE: Policy must not carry a self-insured retention/deductible greater than \$25,000.

☐ **Hazardous Materials Insurance (As Noted Below)**

Hazardous materials include all materials and substances that are currently designated or defined as hazardous by the law or rules of regulation by the State of Florida or federal government. All coverage shall be afforded under either an occurrence policy form or a claims-made policy form, and the policy shall be endorsed and name 'Manatee County, a political subdivision of the State of Florida' as an Additional Insured. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

☐ ***Pollution Liability***

Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Bodily Injury and Property Damage to include sudden and gradual release, each claim and aggregate.

☐ ***Asbestos Liability (If handling within scope of Contract)***

Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Bodily Injury and Property Damage to include sudden and gradual release, each claim and aggregate.

☐ ***Disposal***

When applicable, CONTRACTOR shall designate the disposal site and furnish a Certificate of Insurance from the disposal facility for Environmental Impairment Liability Insurance covering liability.

- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Liability for Sudden and Accidental Occurrences, each claim and an aggregate.
- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Liability for Non-Sudden and Accidental Occurrences, each claim and an aggregate.

☐ **Hazardous Waste Transportation Insurance**

CONTRACTOR shall designate the hauler and have the hauler furnish a Certificate of Insurance for Automobile Liability insurance with Endorsement MCS-90 for liability arising out of the transportation of hazardous materials. EPA identification number shall be provided.

All coverage shall be afforded under either an occurrence policy form or a claims-made policy form and the policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, per accident.

☐ **Liquor Liability Insurance**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- \$1,000,000 Each Occurrence and Aggregate

☐ **Garage Keeper's Liability Insurance**

Coverage shall be required if the maintenance, servicing, cleaning or repairing of any County motor vehicles is inherent or implied within the provision of the contract.

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- Property and asset coverage in the full replacement value of the lot or garage.

☐ **Bailee's Customer Liability Insurance**

Coverage shall be required for damage and/or destruction when County property is temporarily under the care or custody of a person or organization, including property that is on, or in transit to and from the person or organization's premises. Perils covered should include fire, lightning, theft, burglary, robbery, explosion, collision, flood, earthquake and damage or destruction during transportation by a carrier.

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- Property and asset coverage in the full replacement value of the County asset(s) in the CONTRACTOR'S care, custody and control.

☐ **Hull and Watercraft Liability Insurance**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- \$ Each Occurrence
- \$ General Aggregate
- \$ Fire Damage Liability
- \$10,000 Medical Expense, and
- \$ Third Party Property Damage
- \$ Project Specific Aggregate (Required on projects valued at over \$10,000,000)

☐ **Other [Specify]**

INSURANCE REQUIREMENTS

I. THE POLICIES ARE TO CONTAIN, OR BE ENDORSED TO CONTAIN, THE FOLLOWING PROVISIONS:

Commercial General Liability and Automobile Liability Coverages

- a. **“Manatee County, a Political Subdivision of the State of Florida,” is to be named as an Additional Insured in respect to:** Liability arising out of activities performed by or on behalf of the CONTRACTOR, his agents, representatives, and employees; products and completed operations of the CONTRACTOR; or automobiles owned, leased, hired or borrowed by the CONTRACTOR. The coverage shall contain no special limitation(s) on the scope of protection afforded to the COUNTY, its officials, employees or volunteers.

In addition to furnishing a Certificate of Insurance, the CONTRACTOR shall provide the endorsement that evidences Manatee COUNTY being listed as an Additional Insured. This can be done in one of two ways: (1) an endorsement can be issued that specifically lists “Manatee County, a Political Subdivision of the State of Florida,” as Additional Insured; or, (2) an endorsement can be issued that states that all Certificate Holders are Additional Insured with respect to the policy.

- b. The CONTRACTOR'S insurance coverage shall be primary insurance with respect to the COUNTY, its officials, employees and volunteers. Any insurance or self-insurance maintained by the COUNTY, its officials, employees or volunteers shall be excess of CONTRACTOR's insurance and shall be non-contributory.
- c. The insurance policies must be on an occurrence form.

Workers' Compensation and Employers' Liability Coverages

The insurer shall agree to waive all rights of subrogation against the COUNTY, its officials, employees and volunteers for losses arising from work performed by the CONTRACTOR for the COUNTY.

II. General Insurance Provisions Applicable to All Policies

1. Prior to the execution of contract, or issuance of a Purchase Order, and then annually upon the anniversary date(s) of the insurance policy's renewal date(s) for as long as this contract remains in effect, CONTRACTOR shall furnish the COUNTY with a Certificate(s) of Insurance (using an industry accepted certificate form, signed by the Issuer, with applicable endorsements, and containing the solicitation or contract number, and title or description) evidencing the coverage set forth above and naming “Manatee County, a Political Subdivision of the State of Florida” as an Additional Insured on the applicable coverage(s) set forth above.
2. If the policy contains an aggregate limit, confirmation is needed in writing (letter, email, etc.) that the aggregate limit has not been eroded to procurement representative when supplying Certificate of Insurance. In addition, when requested in writing from the COUNTY, CONTRACTOR will provide the COUNTY with a certified copy of all applicable policies. The address where such certificates and certified policies shall be sent or delivered is as follows:

Manatee County, a Political Subdivision of the State of Florida
Attn: Risk Management Division
1112 Manatee Avenue West, Suite 969
Bradenton, FL 34205

3. The project's solicitation number and title shall be listed on each certificate.
 4. CONTRACTOR shall provide thirty (30) days written notice to the Risk Manager of any cancellation, non-renewal, termination, material change, or reduction in coverage of any insurance policies to procurement representative including solicitation number and title with all notices.
 5. CONTRACTOR agrees that should at any time CONTRACTOR fail to meet or maintain the required insurance coverage(s) as set forth herein, the COUNTY may terminate this contract.
 6. The CONTRACTOR waives all subrogation rights against COUNTY, a Political Subdivision of the State of Florida, for all losses or damages which occur during the contract and for any events occurring during the contract period, whether the suit is brought during the contract period or not.
 7. The CONTRACTOR has sole responsibility for all insurance premiums and policy deductibles.
 8. It is the CONTRACTOR'S responsibility to ensure that his agents, representatives and subcontractors comply with the insurance requirements set forth herein. CONTRACTOR shall include his agents, representatives, and subcontractors working on the project or at the worksite as insured under its policies, or CONTRACTOR shall furnish separate certificates and endorsements for each agent, representative, and subcontractor working on the project or at the worksite. All coverages for agents, representatives, and subcontractors shall be subject to all of the requirements set forth to the procurement representative.
 9. All required insurance policies must be written with a carrier having a minimum A.M. Best rating of A- FSC VII or better. In addition, the COUNTY has the right to review the CONTRACTOR's deductible or self-insured retention and to require that it be reduced or eliminated.
- III. CONTRACTOR understands and agrees that the stipulated limits of coverage listed herein in this insurance section shall not be construed as a limitation of any potential liability to the COUNTY, or to others, and the COUNTY'S failure to request evidence of this insurance coverage shall not be construed as a waiver of CONTRACTOR'S obligation to provide and maintain the insurance coverage specified.
- IV. CONTRACTOR understands and agrees that the COUNTY does not waive its immunity and nothing herein shall be interpreted as a waiver of the COUNTY'S rights, including the limitation of waiver of immunity, as set forth in Florida Statutes 768.28, or any other statutes, and the COUNTY expressly reserves these rights to the full extent allowed by law.
- V. No award shall be made until the Procurement Division has received the Certificate of Insurance in accordance with this section.

INSURANCE STATEMENT
RFP No. 20-TA003485SB

THE UNDERSIGNED has read and understands the aforementioned insurance and bond requirements of the Agreement and shall provide the insurance and bonds required by this section within ten (10) days from the date of notice of intent to award.

Proposer Name: _____ Date: _____

Signature
(Authorized
Official): _____

Printed Name/Title: _____

Insurance Agency: _____

Agent Name: _____ Agent Phone: _____

Return this signed statement with your proposal.

EXHIBIT 1, SCOPE OF SERVICES

Proposer must be able to provide services for all Alzheimer's Disease Initiative (ADI) Respite, Community Care for the Elderly (CCE) Homemaker, CCE Personal Care and CCE Respite to be deemed responsive and responsible. It is the intent of the County to establish multiple Agreements.

ALZHEIMERS DISEASE INITIATIVE (ADI) RESPITE SERVICES

BACKGROUND INFORMATION

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 provision of Respite Services for relief or rest for a primary caregiver from the constant continued supervision, companionship, therapeutic and/or personal care of a functionally impaired elderly person for a specified period of time.

SCOPE

Successful Proposer (hereinafter in this Scope referred to as Provider) shall furnish all equipment, labor, materials, supplies, licensing, transportation, and other components necessary to provide Alzheimer's Disease Initiative Respite Services that will meet the requirements of the Agreement.

Objective of the ADI Respite 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 elderly person who has Alzheimer's Disease or a related dementia.
- 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 lifestyle when the regular caregiver is out of the home.

UNITS OF SERVICE

Beginning December 27, 2020, Provider shall be required to deliver, at a minimum, the following number of units for the ADI Respite Service.

ADI Respite Units Weekly: 500

Service is to be delivered from December 27, 2020 through June 30, 2021 with a provision for an extension of the Agreement for five (5) 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.

REIMBURSEMENT RATE

The reimbursement rate for ADI Respite services is \$23.21 per unit.

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 care will not be substituted for the care usually provided by a registered or licensed nurse or therapist.

Each Provider must submit with their Proposal Response 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 (CCM).
- 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.
- 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, beginning and ending hours worked and getting client signature.

Each Provider must submit written procedures for the following:

- A. Development of a Daily Service Provision Log indicating activities performed by the ADI Respite worker during the home visit and the number of hours spent performing the service. This log should also provide 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 the CCM.
- 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 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 (DOEA) requirements.

STAFF REQUIREMENTS

ADI Respite Supervisor: A qualified registered nurse 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 semi-annually. 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 the 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 the 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 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.

TRAINING REQUIREMENTS

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 must be submitted with the Proposal Response covering, at a minimum, the following topics:

- A. Health problems and care of elderly 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 dementia.
- E. Dealing with behaviors characteristic of Alzheimer's Disease and other related dementia.
- 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 provider. 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.

SPECIAL CONDITIONS/MINIMUM QUALIFICATIONS

Providers 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. Per Chapter 400.464(5)(b)(1), Florida Statutes, home health services provided by DOEA either directly or through a contractor, are exempt from home health agency licensing. A copy of the appropriate license must be submitted with the response to the Proposal.

Provider will ensure prior to providing ADI Respite services, Respite Care aides shall meet background screening requirement in accordance with Chapter 400.512, Florida Statutes, and Chapter 59A-8.004(10) and (11), Florida Administrative Code.

Provider 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.

Provider must be able to provide services to all zip codes within Manatee County.

Units of ADI Respite Service actually provided during the previous week will be reported by 1:00 PM the following Tuesday to the Fiscal Section of the County's Alzheimer's Disease Initiative Program.

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 Provider in the same position.

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

Provider, 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.

Providers must submit with their Proposal, the job description of staff providing ADI 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.

Provider shall not charge ADI Respite workers for any expenses incurred in order for the Provider to meet OSHA requirements or any cost associated with obtaining the required DOEA Level II Background checks.

Provider shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) 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

LIAISON

The Provider 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 Provider shall be subject to review and approval by the County's Contract Manager.

PERFORMANCE ACCEPTANCE PROCEDURES

During the entire duration of the Agreement, the County's Contract Manager shall monitor the performance of the Provider 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 Provider shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Provider shall take immediate action to correct the deficiencies.

COMMUNITY CARE FOR THE ELDERLY (CCE) HOMEMAKER SERVICES

BACKGROUND INFORMATION

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 Services to assist the functionally impaired elderly person with home management duties for a specified period of time.

SCOPE

Successful Provider shall furnish all equipment, labor, materials, supplies, licensing, transportation, and other components necessary to provide CCE Homemaker Services that will meet the requirements of the Agreement.

Objective of the CCE Homemaker Services are:

- A. Provide a clean, safe living environment to functionally impaired elderly persons.
- B. Provide a supply of clean clothes and linens to functionally impaired elderly persons.
- C. Provide the availability of food and medicines in the home for functionally impaired elderly persons.
- D. Prevent inappropriate institutionalization of functionally impaired elderly persons.

UNITS OF SERVICE

Beginning December 27, 2020 and ending June 30, 2021, Provider shall be required to deliver, at a minimum, the following number of units for the Homemaker Service.

Homemaker Units Per Week: 450

Service is to be delivered from December 27, 2020 through June 30, 2021 with a provision for an extension of the Agreement for five (5) 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.

REIMBURSEMENT RATE

The reimbursement rate for Homemaker services is \$19.61 per unit.

REQUIREMENTS AND RESPONSIBILITIES

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

Each Provider must submit with their Proposal Response 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 worker 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 (CCM).
- 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 performing services requiring a registered or licensed practical nurse or therapist.
- G. Not giving the client the Homemaker worker's home telephone number or address.
- H. Not administering medications.
- I. Not transporting clients.
- J. Allowing the Homemaker 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. Homemaker 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 Provider must submit written procedures for the following:

- A. Development of a Daily Service Provision Log indicating activities performed by the Homemaker worker during the home visit and the number of hours spent performing the service. 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 Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan submitted by CCM.
- C. Ensuring that adequate records are maintained to record and evaluate Homemaker 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.

Homemaker 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. 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 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 and reliable means of transportation.
- Q. Education should be sufficient to follow written and verbal instructions and the ability to complete required reports.

TRAINING REQUIREMENTS

Pre-Service: Prior to working with clients, Homemaker staff must be trained in those supportive services are required to make the client comfortable. Each Homemaker 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 must be submitted with the Proposal Response 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. Shopping and food storage.
- F. Use of household equipment and supplies.
- G. Record keeping and reporting requirements.

If Homemakers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all the required training at the discretion of the provider. 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.

SPECIAL CONDITIONS/MINIMUM QUALIFICATIONS

Providers 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.

Provider will ensure that prior to providing services, all Homemakers shall meet background screening requirements in accordance with Chapter 400.512, Florida Statutes, and Chapter 59A-8.004(10) and (11), Florida Administrative Code.

Provider 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.

Provider must be able to provide services to all zip codes within Manatee County.

Units of Homemaker Service actually provided during the previous week will reported 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 Homemaker program to provide services, shall be equal to non CCE funded staff employed by the Provider in the same position.

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

Provider, 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.

Providers 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.

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

Provider shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) 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.

LIAISON

The Provider 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 Provider shall

be subject to review and approval by the County's Contract Manager.

PERFORMANCE ACCEPTANCE PROCEDURES

During the entire duration of the Agreement, the County's Contract Manager shall monitor the performance of the Provider 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 Provider shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Provider shall take immediate action to correct the deficiencies.

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COMMUNITY CARE FOR THE ELDERLY (CCE) PERSONAL CARE SERVICES

BACKGROUND INFORMATION

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 Services to assist the functionally impaired elderly person with personal hygiene, dressing and other activities of daily living for a specified period of time.

SCOPE

Successful Provider shall furnish all equipment, labor, materials, supplies, licensing, transportation, and other components necessary to provide CCE Personal Care Services that will meet the requirements of the Agreement.

Objective of the CCE Personal Care Services are:

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

UNITS OF SERVICE

Beginning December 27, 2020, Provider shall be required to deliver, at a minimum, the following number of units for the Personal Care Service.

Personal Care Units Per week: 250

Service is to be delivered from December 27, 2020 through June 30, 2021 with a provision for an extension of the Agreement for five (5) 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.

REIMBURSEMENT RATE

The reimbursement rate for Personal Care services is \$22.44 per unit.

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 Services will not be substituted for the care usually provided by a registered or licensed practical nurse or therapist.

Each Provider must submit written policies and procedures for Personal Care workers which address:

Emergency procedures to be followed in the event something happens to the client when the Personal Care worker is in the home.

- A. Reporting changes in the client's condition or behavior to the Nurse Supervisor, who will in turn contact the County Case Manager.
- B. Not engaging in Personal Care activities not specified in the Care Plan.
- C. Not accepting gifts from clients.
- D. Not lending nor borrowing money or articles from clients.
- E. Not performing services requiring a registered or licensed practical nurse or therapist.
- F. Not giving the client the Personal Care worker's home telephone number or address.
- G. Not administering medications.
- H. Not transporting clients.
- I. Allowing the Personal Care worker 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. 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 Provider 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. 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 the CCM.
- 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.

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.
- F. Maintains frequent contact with the Personal 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 Personal Care worker.
- I. 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.

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 Proposal Response covering, at a minimum, the following topics:

- A. Health problems and care of elderly 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.

If Personal Care workers have received prior equivalent pre-service training, within the last three years, it can be substituted for parts or all the required training at the discretion of the provider. The personnel file of the Personal Care worker must include documentation of the allowable prior training.

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.

SPECIAL CONDITIONS/MINIMUM QUALIFICATIONS

This service shall be provided in compliance with the regulation of the home health agencies in Chapter 400, Part IV, Florida Statutes, and Chapter 59A-8, Florida Administrative Code. Services are provided by persons employed by agencies licensed or exempt under Chapter 400.464, Florida Statutes, or independent vendors in compliance with Chapter 400, Part IV Florida Statutes, and Chapter 59A-8, Florida Administrative Code. Per Chapter 400.464(5)(b)(1), Florida Statutes, home health services provided by DOEA either directly or through a contractor, are exempt from home health agency licensing. A copy of the appropriate license must be submitted with the response to the Proposal.

Provider will ensure that prior to providing services, personal care assistants shall meet background screening requirements in accordance with Chapter 400.512, Florida Statutes, and Chapter 59A- 8.004(10) and (11), Florida Administrative Code.

Provider 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.

Provider must be able to provide services to all zip codes within Manatee County.

Units of Personal Care Service actually provided during the previous week will be reported by 1:00 PM the following Tuesday to the Fiscal Section of the County's CCE Personal Care 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 Provider in the same position.

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

Provider, 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.

Providers 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.

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

Provider shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) 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.

LIAISON

Provider 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 Provider shall be subject to review and approval by the County's Contract Manager.

PERFORMANCE ACCEPTANCE PROCEDURES

During the entire duration of the Agreement, the County's Contract Manager shall monitor the performance of the Provider 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 Provider shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Provider shall take immediate action to correct the deficiencies.

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COMMUNITY CARE FOR THE ELDERLY (CCE) RESPITE SERVICES

BACKGROUND INFORMATION

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) Program calls for provision of Respite Services for relief or rest for a primary caregiver from the constant continued supervision, companionship, therapeutic and/or personal care of a functionally impaired elderly person for a specified period of time.

SCOPE

Successful Provider shall furnish all equipment, labor, materials, supplies, licensing, transportation, and other components necessary to provide CCE Respite Services that will meet the requirements of the Agreement.

Objective of the CCE Respite 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 elderly 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 lifestyle when the regular caregiver is out of the home.

UNITS OF SERVICE

Beginning December 27, 2020, Provider shall be required to deliver, at a minimum, the following number of units for the CCE Respite Service.

CCE Respite Units Weekly: 300

Service is to be delivered from December 27, 2020 through June 30, 2021 with a provision for an extension of the Agreement for five (5) 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.

REIMBURSEMENT RATE

The reimbursement rate for CCE Respite services is \$23.21 per unit.

REQUIREMENTS AND RESPONSIBILITIES

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

Each Provider must submit with their Proposal Response written policies and procedures for CCE Respite workers which address:

- A. Emergency procedures to be followed in the event something happens to the client when the CCE Respite worker is in the home.
- B. Reporting changes in the client's condition or behavior to the CCE Respite Supervisor, who will in turn contact the County Case Manager (CCM).
- C. Not engaging in CCE 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.
- G. Not giving the client the CCE Respite worker's home telephone number or address.
- H. Not administering medications.
- I. Not transporting clients.
- J. Allowing the CCE 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. CCE Respite 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 Provider must submit written procedures for the following:

- A. Development of a Daily Service Provision Log indicating activities performed by the CCE Respite worker during the home visit and the number of hours spent performing the service. This log should also provide for the signature of the CCE Respite worker and the client to verify that services were received.
- B. Establishment of a CCE Respite Activities Plan outlining tasks/activities to be performed for the client per instructions listed on the Care Plan submitted by the CCM.
- C. Ensuring that adequate records are maintained to record and evaluate CCE Respite 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.

STAFF REQUIREMENTS

CCE Respite Supervisor: A qualified registered nurse on staff to supervise and provide pre-service and in-service training to workers providing CCE Respite Service. The CCE Respite Supervisor shall make home visits which include observation of service delivery to evaluate the CCE Respite worker's performance and skills at least semi-annually. The CCE 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 CCE Respite staff.

Major Functions of the CCE Respite Supervisor:

- A. Provides supervision, support and assistance to CCE Respite workers in the provision of direct services.
- B. Assists in the recruitment, screening and training of CCE Respite workers.
- C. Assists in planning and development of an organized program of pre-service and in-service training for CCE Respite workers.
- D. Interprets to the CCE Respite worker their roles and responsibilities within the total program and the clients they will serve.
- E. Makes case assignments in accordance with the CCE Respite worker's skills and explains the service needs of the client being served.
- F. Maintains frequent contact with the CCE 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 CCE Respite worker.
- I. Ensures accurate completion of all records and reports by the CCE Respite workers and maintains program statistical data and records as required by the County.

CCE 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 CCE 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 CCE Respite 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.

TRAINING REQUIREMENTS

Pre-Service: Prior to working with clients, CCE Respite staff must be trained in those supportive services which are required to make the client comfortable. Each CCE 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 must be submitted with the Proposal Response covering, at a minimum, the following topics:

- A. Health problems and care of elderly 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 dementia.
- E. Dealing with behaviors characteristic of dementia.
- F. Record keeping and reporting requirements.

If CCE 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 provider. The personnel file of the CCE Respite worker must include documentation of the allowable prior training.

In-Service: Staff providing CCE Respite Service will be scheduled regularly or in-service training to augment or refresh the CCE 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.

SPECIAL CONDITIONS/MINIMUM QUALIFICATIONS

Providers for CCE 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. Per Chapter 400.464(5)(b)(1), Florida Statutes, home health services provided by DOEA either directly or through a contractor, are exempt from home health agency licensing. A copy of the appropriate license must be submitted with the response to the Proposal.

Provider will ensure prior to providing services Respite Care aides shall meet background screening requirement in accordance with Chapter 400.512, Florida Statutes, and Chapter 59A-8.004(10) and (11), Florida Administrative Code.

Provider must be able to begin CCE Respite Service to clients within seven calendar days after notification and authorization has been made by the Case Manager. CCE Respite Service shall be provided Monday through Saturday. CCE 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.

Provider must be able to provide services to all zip codes within Manatee County.

Units of CCE Respite Service actually provided during the previous week will be e-mailed by

1:00 PM the following Tuesday to the Fiscal Section of the County's CCE Respite program.

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

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

Provider, 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.

Providers must submit with their Proposal, the job description of staff providing CCE 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.

Provider shall not charge CCE Respite workers for any expenses incurred in order for the Provider to meet OSHA requirements or any cost associated with obtaining the required DOEA Level II Background checks.

Provider shall comply with all requirements of the Health Insurance Portability and Accountability Act (HIPAA) 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.

LIAISON

The Provider 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 Provider shall be subject to review and approval by the County's Contract Manager.

PERFORMANCE ACCEPTANCE PROCEDURES

During the entire duration of the Agreement, the County's Contract Manager shall monitor the performance of the Provider 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 Provider shall cooperate with and assist the County's Contract Manager or designee in the delivery of services monitoring review. When deficiencies are indicated, the Provider shall take immediate action to correct the deficiencies.

END EXHIBIT 1

EXHIBIT 2
PROPOSAL RESPONSE REQUIREMENTS
RFP No. 20-TA003485SB

This section identifies specific information which must be contained within the proposal and the order in which such information should be organized. The information each Proposer provides will be used to determine those Proposers with the background, experience and capacity to perform the scope of services as stated in this RFP and which Proposal best meets the overall needs of the County. For more information on the evaluation process, refer to Section B, Evaluation of Proposals.

2.01 INFORMATION TO BE SUBMITTED

The contents of each Proposal will be organized and arranged with tabs in the same order as listed below and with the same TAB numbers. The Proposal should contain sufficient detail to permit the County to conduct a meaningful evaluation. However, overly elaborate responses are not requested or desired.

2.02 PROPOSAL FORMAT

A. FORMAT

The contents of the Proposal package must include one bound original and one electronic format copy. The contents of the Proposal package, if submitted electronically, must include one electronic format original.

NOTE: Electronic submissions should be submitted on a USB drive or compact disc in Microsoft Office® or Adobe Acrobat® PDF format **in one file** that includes all required TAB sections shown below in a continuous file. Do not submit proposal in separate files for each TAB section. Do not password protect or otherwise encrypt electronic submissions. For more information regarding submission of Proposals, refer to the Request for Proposals, Section A.03, Submission of Proposals.

B. TAB 1 – INTRODUCTION

Include the following in Tab 1 of the Proposal.

1. A cover page that identifies Proposer, the RFP by title and the RFP number.
2. An introductory letter/statement that describe your proposal in summary form (limit 2 pages).
3. A table of contents.

C. TAB 2 – MINIMUM QUALIFICATION REQUIREMENTS

In Tab 2 submit the information and documentation requested that confirms Proposer meets the following minimum qualification requirement(s):

1. Must be registered with the State of Florida, Division of Corporations to do business in Florida.

No documentation is required. The County will verify registration.

2. Provide a current, valid license or certification for each individual service Proposer intends to provide as defined in Exhibit 1, Scope of Service, Special Conditions / Minimum Qualifications.

Provide a copy of Proposer's license or certification as defined in Exhibit 1, Scope of Service, Special Conditions/Minimum Qualifications.

3. Proposer is not on the Florida Suspended, Debarred, Convicted Vendor List.

No documentation is required. The County will verify.

4. Proposer is not on the Federal Excluded Parties (Convicted Vendor) List

No documentation is required. The County will verify.

5. Proposer has not been convicted of a public entity crime per Section 287.133, Florida Statutes or environmental law in the past five years.

Proposer must complete Attachment C and submit with its Proposal attesting that it has not been convicted of a public entity crime or environmental law in the past five years.

6. If Proposer is submitting as a joint venture, must file the required documents with the Florida Department of Business and Professional Regulation as required by Florida Statute Section 489.119, prior to the Due Date and Time.

If Proposer is a joint venture, provide a copy of Proposer's approved filing with the Florida Department of Business and Professional Regulation.

7. Proposer has no reported conflict of interests in relation to this RFP.

Disclose the name of any officer, director or agent who is also an employee of the County. Disclose the name of any County employee who owns, directly or indirectly, any interest in the Proposer's firm or any of its branches.

If no conflicts of interests are present, Proposer must provide a statement attesting that it has no conflicts of interest.

D. TAB 3 – FORMS

Provide the completed and executed Attachments included in this RFP in Tab 3.

1. Attachment A, Acknowledge of Addenda
2. Attachment B, Proposal Signature Form
3. Attachment C, Public Contracting and Environmental Crimes Certification
4. Attachment D, Insurance Statement

E. TAB 4 - TRADE SECRETS

Pursuant to Section A.27, Trade Secrets, in Tab 4 identify any trade secret being claimed. **NOTE: Designation of the entire Proposal as “Trade ‘Secret’, ‘Proprietary’ or ‘Confidential’ is not permitted and may result in a determination that the Proposal is non-responsive and therefore will not be evaluated or considered.** Proposer must submit purported trade secret information as follows:

1. Trade secret material must be segregated in a separate document, from the portions of the Proposal that are not being declared as trade secret. **NOTE:** Trade secret requests made after the Due Date and Time are not allowed.
2. Proposer shall cite, for each trade secret claimed, the Florida Statute number which supports the designation. Further, Proposer shall Proposal a brief written explanation as to why the cited Statute is applicable to the information claimed as trade secret.
3. Proposer shall provide an additional hard copy and electronic copy of its proposal that redacts all designated trade secrets.

F. TAB 5 - PROPOSER STATEMENT OF ORGANIZATION

In Tab 5, provide information and documentation on Proposer as follows:

1. Legal contracting name including any dba.
2. State of organization or incorporation.
3. Ownership structure of Proposer’s company. (e.g., Sole Proprietorship, Partnership, Limited Liability Corporation, Corporation)
4. Federal Identification Number.
5. A fully completed (signed and dated) copy of Proposer’s W-9 (REV. October 2018).
6. Contact information for Proposer’s corporate headquarters and local office (if different) **NOTE:** local is defined as Manatee, DeSoto, Hardee, Hillsborough, Pinellas or Sarasota counties. Include the following:
 - a. Address
 - b. City, State, Zip
 - c. Phone

- d. Number of years at this location
7. List of officers, owners and/or partners, or managers of the firm. Include names, addresses, email addresses, and phone numbers.
8. Contact information for Proposer's primary and secondary representatives during this RFP process to include the following information:
 - a. Name
 - b. Phone
 - c. E-mail
 - d. Mailing Address
 - e. City, State, Zip
9. Provide a brief summary regarding 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.
10. Provide details of any ownership changes to Proposer's organization in the past three years or changes anticipated within six months of the Due Date and Time (e.g., mergers, acquisitions, changes in executive leadership).

G. TAB 6 – PROPOSER AND TEAM'S EXPERIENCE

In Tab 6, provide details of Proposer and its team's experience to include the following:

1. Provide a summary of Proposer's background, size and years in business.
2. Provide Proposer's years of experience in Alzheimer's Disease Initiative and Community Care for the Elderly services, particularly for other government agencies in Florida.
3. Identify and include information regarding experience and qualifications of Proposer's key staff (e.g., project lead, managers, supervisors) to be assigned to the services. Include a resume for each with their full names, the name of the firm(s) for their current and previous employers, professional credentials (e.g., certifications and/or licenses), and roles and duties which the individuals will provide to the County. Include the address of their current primary office location, email address and phone number.
4. Identify any proposed sub-contractors to accomplish the work. Include the name of the individual(s) to be assigned, and an overview of their experience and qualifications related to Alzheimer's Disease Initiative and Community Care for the Elderly services.
5. Describe any significant or unique accomplishments or recognition received by Proposer's personnel in previous similar services.
6. Provide a minimum of three (3) client references for which Proposer has provided

services, similar in scope as defined in this RFP, who are agreeable to responding to an inquiry by the County. References should include the following information:

- a. Client name
- b. Client address
- c. Client contact name
- d. Client contact phone number
- e. Client contact email address
- f. Brief description of all services provided (1-2 sentences)
- g. Performance period (start/end dates)

H. TAB 7 - CAPACITY

In Tab 7, provide the following information regarding Proposer's capacity for the provision of services.

1. Details of Proposer's staffing resources, at the location that will provide services to the County as well as corporately; by discipline and the number of personnel within each discipline.
2. An organizational diagram clearly identifying key personnel who are designated to provide services to the County and indicate their functional relationship to each other.
3. If Proposer is teaming with other entities to provide the required services, detail any prior similar work any two or more team members have jointly performed.
4. An explanation, in general terms, of Proposers' financial capacity to perform the scope of services. If Proposer is jointly filing a proposal with other entities, details must be provided to demonstrate financial capacity of each entity.
5. Provide a statement on company letterhead and signed by a company official authorizing a County auditor and/or financial analysts access to your financial records, including 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 Proposer's business entity and its expected ability to meet ongoing financial obligations related to the required services, if awarded a contract. If an audit is conducted, the County's audit and/or financial analysts will report their findings in a summary report to the Procurement Official, which will be placed in the proposal files for subsequent use, review, and discussions during evaluations.
6. Disclose any ownership interest in other entities proposed for services. This ownership disclosure includes ownership 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.

I. TAB 8 – APPROACH

In Tab 9, provide Proposer's project approach to include the following:

1. Detailed plan of the Proposer's ability and willingness to meet required services as identified in Exhibit 1, Scope of Services.
 - a. Requirements and Responsibilities
 - b. Staff Requirements
 - c. Training Requirements
 - d. Special Conditions/Minimum Qualifications
2. Proposer shall thoroughly explain:
 - a. Its accessibility in the areas of availability for meetings, general communications, coordination, and supervision.
 - b. How the Proposer physically plans on attending pre-scheduled meetings.
 - c. How the Proposer plans on ensuring accessibility and availability during the term of the Agreement.
3. Proposer's Risk Management Plan that includes a list of risks related to the provision of services, the potential consequences or impact of each (e.g., cost, schedule, technical) and Proposer's proposed mitigation procedures for each item.
4. Provide details of Proposer's processes related to recruitment, hiring and retaining employees.

END EXHIBIT 2