



**Community Care for the Elderly Lead Agency Designation  
Request for Proposal Evaluation Tool**

Members of the Selection Team will be referred to as Evaluators.

**0 Omitted**

**1-3 Not Acceptable** - The proposal fails to meet the minimum requirements as set forth in the Request for Proposal for the category, item or service under evaluation. Evaluators should score in this range if certain that the proposal is substantially deficient in the category, item or service.

**4-6 Marginally Acceptable** - this range applies when the proposal meets the Request for Proposal=s minimum requirements for the category, item or service, but the evaluator is left with some reservations and or believes there is room for substantial improvement.

**7-9 Acceptable** - this range applies when the proposal meets the Request for Proposal=s minimum requirements for the category, item or service being evaluated and the evaluator is confident, has little to no reservations or qualifications, in the proposer=s ability to adequately deliver the item or service.

**10-12 Exceptional** - This range applies when the proposal meets or exceeds all requirements for the category, item or services, and the evaluator is certain that the proposer=s treatment of the category, item more service is substantially superior.

Criteria	Score	Comments
<b>1. General Information</b>		<b>Weight = 2%</b>
Title Page		
Table of Contents		
Service Provider Summary Information		
<b><u>Section Sub-Total</u></b>		
<b>2. Corporate Qualifications and Capability</b>		<b>Weight = 50%</b>
Criteria	Score	Comments
<b>II.A.1. Narrative</b> - A synopsis of the background and qualifications of the applicant agency which attests to its capability as a Lead Agency, or potential Lead Agency. Responsibilities in addition to Case Management, found in Section B. 1.a. Service Delivery Methodology and 1.b. Lead Agency requirements are addressed.		
<b>II.A.2. Organizational Chart(s)</b> - depicting how project staff fit into total agency and how project staff positions interrelate.		
<b>II.A.3. Board of Directors/Corporate Officers</b> - names, addresses and telephone numbers of each		

member of the agency's Board of Directors and/or Corporate Officers and each member's term of office and term expiration date.		
<b>II.A.4. Audited Financial Statements</b> attesting to the reliability of the applicant's financial and administrative system.		
<b>II.A.5. Certification of Availability of 60 days Operating Funds</b> in a signed statement.		
<b>II.A.6. Corporate Bylaws</b> – copy submitted.		
<b>II.A.7. IRS Determination</b> – copy of letter submitted if agency is a non-profit.		
<b>II.A.8. Statement of No Involvement and Contract Terms and Conditions</b> completed and signed by an authorized representative of the applicant agency. – <b>PART OF FATAL CRITERIA</b>		
<b>II.A.9. Assurance of Insurance Coverage</b> Minimum coverage should include liability, worker's compensation, employee bonding, and directors' and officers' liability insurance. (Please note that successful applicants are required to present documentation of actual insurance coverage).		
<b>II.A.10. Administrative Assessment Checklist</b> Signed certification statement submitted.		
<b>II.A.11. Explanation/Outline of Proposed Staffing</b> Written explanation of how staffing requirements will be met.		
<b>II.A.11.a. Current/Proposed Job Descriptions and Qualifications &amp; Personnel Policies for new bidders</b> Attachments		
<b>II.A.12. Cost Efficiency and Program Effectiveness Plan.</b> How the organization will assure cost efficiency and program effectiveness without detriment to service quality, as well as how personnel standards will be maintained.		
<b>II.A.13. Statement Assuring No CCE Funds Used in Development of RFP.</b> Signed certification statement submitted.		
<b>Section Score</b>		

**3. Description of Service Delivery and Coordination**

**Weight = 24%**

Criteria	Score	Comments
<p><b>III.A.1. Service Delivery and Coordination Plan.</b>                      A plan of action for delivery and coordination of Case Management and Case Aide (as appropriate) under Community Care for the Elderly, Alzheimer’s Disease Initiative, and Home Care for the Elderly. Provide explanation how data will be maintained in order to <b>provide the Area Agency on Aging with routine reports communicating expenditures, attrition, care plan costs etc. in an effort to ensure all funds are utilized by the PSA.</b> Lead Agencies must also ensure that all other funding sources available have been exhausted before utilizing Department of Elder Affairs’ funds.</p> <p><b>For Pasco County ONLY:</b> A plan to manage a core service system of providers through subcontracts or vendor agreements is required.</p>		
<p><b>III.A.2. Provider Work Plan</b>                      Lead Agency applicants must address how their agency will coordinate with vendors and the Area Agency on Aging of Pasco-Pinellas, Inc. Also describe how cases will be assigned internally. If a new provider, discuss start-up activities that will take place prior to implementation of the new Community Care for the Elderly contract.</p> <p><b>For Pasco County ONLY:</b> Vendor monitoring schedule must be submitted.</p>		
<p><b>III.A.3. Client Identification Methodology.</b> Describe efforts which will be made to identify and inform frail elder of available services. Include interagency efforts and list cooperating agencies.</p>		
<p><b>III.A.4. Client Prioritization and Termination Plan.</b>                      Define / describe the process which will be used in prioritizing clients to receive services under each Program (Community Care for the Elderly, Home Care for the Elderly, and Alzheimer’s Disease Initiative) to ensure the most frail clients are served first in each program.</p>		
<p><b>III.A.6. Client Adverse Incident, Complaint and Grievance Procedures.</b> Procedures regarding handling of client adverse incidents, complaints and processing grievance appeals.</p>		

<p><b>III.A.7. Client Confidentiality and Security.</b> The methods and procedures which the applicant will utilize to safe guard client confidentiality. It should include client file security, CIRTTS data access, shredding of printouts containing client identifiable data, sharing of information with other agencies and training of case managers and other staff on confidentiality guidelines.</p>		
<p><b>III.A.8. HIPAA.</b> The methods and procedures which applicant will utilize to ensure HIPAA requirements are met.</p>		
<p><b>III.A.9. E-Verify Requirements.</b> The methods and procedures which applicant will utilize to ensure E-Verify Requirements are met.</p>		
<p><b>III.A.10. Social Security Disclosure.</b> The methods and procedures which applicant will comply with social security number confidentiality and security measures.</p>		
<p><b>III.A.11. Background Screening.</b> The methods and procedures applicant will utilize to ensure background screening requirements are met.</p>		
<p><b>III.A.12. Quality Control and Client Satisfaction.</b> The methods and procedures applicant will utilize to determine/evaluate client satisfaction.</p>		
<p><b>III.A.13. Continuation Bidder Documentation of Effective Management / Service Quality.</b>  Applicant agencies currently under contract as Lead Agencies should provide a total of two monitoring reports reflecting reviews of Lead Agency services. One report must be from reviews conducted on the fiscal oversight of a project and one report must be provided reflecting reviews of programmatic implementation of a project. If monitoring reports cover reviews of both departments, proposal should explain this. Proposal must address steps taken to ensure problems identified in reports do not re-occur.  A letter of reference from another major funding source (besides the Area Agency on Aging of Pasco-Pinellas, Inc.) must be provided addressing the agencies management capabilities, accountability of funds and service provision.</p>		<p><u>Provider proposals from agencies NOT currently serving in the capacity of Lead Agency will not be scored on this topic and should have an -N/A- placed in the score box.</u></p>

<p><b>III.A.14. New Bidder Documentation of Effective Management / Service Quality</b></p> <p>Agencies not currently serving as a Lead Agency are considered new and should provide a total of three monitoring reports reflecting reviews of services most similar to that of a Lead Agency. One report must be from reviews conducted on the fiscal oversight of a project from 2015. Two reports must also be provided reflecting reviews of programmatic implementation of a project; one from 2016 and one from 2015. If monitoring reports cover reviews of both fiscal and program, the proposal should explain this. In addition, proposals must address steps taken to ensure problems identified in reports do not re-occur</p> <p>A letter of reference from another major funding source (besides the Area Agency on Aging of Pasco-Pinellas, Inc.) must be provided addressing the agencies management capabilities, accountability of funds and service provision.</p>		<p><u>Provider proposals from the agency currently serving in the capacity of Lead Agency will not be scored on this topic and should have an -N/A- placed in the score box.</u></p>
<p><b>III.A.15. Documentation of Bidder Experience.</b></p> <p>Types of experience they have had in provision of services to frail elders, as well as the length of time (in years) they have worked to meet the needs of elders in the State of Florida.</p>		
<p><b>III.A.16. Plan to Achieve Outcome / Output Measures.</b></p> <p>Action steps to address 6 key goals/objectives identified by DOEA and the outcome measures identified by the Florida Legislature.</p>		
<p><b>III.A.17. Volunteers</b></p> <p>Steps to recruit, utilize and retain volunteers.</p>		
<p><b>III.A.18. Disaster Preparedness</b></p> <p>Details regarding disaster preparedness and procedures in place.</p>		
<p><b>III.A.19. Co-Payments</b></p> <p>Plan to adhere to DOEA requirements including goals, assessment and collection, and utilization of co-payments.</p>		
<p style="text-align: right;"><b>Section Score</b></p>		

<b>4. Contract Budget and Justification</b>		<b>Weight = 24%</b>
<b>II.B.1. PERSONNEL COST FLOW WORKSHEET</b> All costs for each position in an agency.		
<b>II.B.2. SUPPORTING BUDGET WORKSHEET</b>		
<b>II.B.3. Supporting Budget by Program Activity</b>		
<b>III.B.1-6. Matching Commitment Documentation</b>		
<b>IV.B. - Availability of Documents-</b> All documents listed on the Availability of Documents formats are to be maintained at the administrative office of the service provider and must be current and available for inspection by the AAA or DOEA upon request		
<b>V.B. Equipment/Property Inventory-</b> Records on property and/or equipment purchased with Federal or State Funds <b>must</b> be maintained at all times.		
<b>VI.B. Certification Regarding Debarment, Suspension</b> Signed certification is present.		
<b>Attachment I. - Staff Development and Training Plan</b> Describes training as described in the DOEA Programs and Services Handbook.		
<b>Attachment II - Site List</b> Address of each office(s) and service delivery site planned. Include the name of the individual in charge at each site and the site telephone number.		
<b>Attachment III – Five Year Quote.</b> Justification and methodology for any increases proposed for the second, third, fourth and fifth year quotes.		
<b>Section Score</b>		

**Community Care for the Elderly Lead Agency Designation**

**Request for Proposal Fatal Criteria and Proposal Evaluation Instrument**

**Scoring Sheet**

**Agency:** \_\_\_\_\_ **Evaluator:** \_\_\_\_\_

Instructions: Each sub-total obtained for each section will be entered on the scoring sheet and multiplied by the assigned weight for that particular section. The result of that calculation will then be added to the Section sub-total

Step 1. Section Score x Weight = Y

Step 2. Section Score + Y = Weighted Score

**1. General Information (Weight = 2%)**

Section Score \_\_\_\_\_ x .02 = \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_ = \_\_\_\_\_  
Section Score      Additional Weight      Weighted Score

**Weighted Score** \_\_\_\_\_

**2. Corporate Qualifications and Capability (Weight = 50%)**

Section Score \_\_\_\_\_ x .50 = \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_ = \_\_\_\_\_  
Section Score      Additional Weight      Weighted Score

**Weighted Score** \_\_\_\_\_

**3. Description of Service Delivery and Coordination (Weight = 24%)**

Section Score \_\_\_\_\_ x .24 = \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_ = \_\_\_\_\_  
Section Score      Additional Weight      Weighted Score

**Weighted Score** \_\_\_\_\_

**4. Contract Budget and Justification (Weight = 24%)**

Section Score \_\_\_\_\_ x .24 = \_\_\_\_\_

\_\_\_\_\_ + \_\_\_\_\_ = \_\_\_\_\_  
Section Score      Additional Weight      Weighted Score

**Weighted Score** \_\_\_\_\_

**Total Weighted Proposal Score:** \_\_\_\_\_