

**AREA AGENCY ON AGING OF BROWARD COUNTY  
BIDDERS' CONFERENCE SUMMARY & QUESTIONS  
MONDAY, MAY 19, 2025, 10:00 AM**

**WELCOME**

Our Executive Director, Charlotte Mather-Taylor, welcomed the group to the Area Agency on Aging of Broward County Bidders' Conference for Older Americans Act Funds, Titles III-B, III-D, and III-E. She continued with an introduction of the AAABC Team: Shirley Snipes, Planning Director; Elizabeth Lombardo, Program Director, and Shahnaaz Yasin, Chief Grants Officer.

**INTRODUCTIONS**

The following persons were in attendance:

Terry Lieberman, Northwest Focal Point; Kasia Nowak, City of Margate/Northwest Focal Point; Kartrina Davenport, Southcentral Southeast Focal Point, City of Miramar; Stephanie McCutcheon, Northeast Focal Point; Vanessa Armenta, Senior Proof, Inc.; Sandra Valdes, Catholic Charities; Ivon Suarez, Catholic Charities; Sarah Barker, Coast to Coast Legal Aid; Silvia Aguilar, Southwest Focal Point; Boris Anoceto, United Home Care; Jeanette Gonzalez, Easter seals South Florida; Iani Carvalho, Catholic Charities; Christine Sainvil, Easter seals South Florida; Patricia Jones, Northwest Federated Woman's Club of Broward, Inc.; Robin Martin, Rebuilding Together Broward; Lisa G. Goldberg, Coast to Coast Legal Aid of South Florida; Krishauana DeLisser, Southcentral Southeast Focal Point.

**STATEMENT OF PURPOSE/ REVIEW OF DEADLINES/ RFP INFORMATION**

Mrs. Shirley Snipes, Planning Director, AAABC Broward, reviewed the Statement of Purpose, Request for Proposal (RFP) Deadlines and General Information.

Mrs. Snipes stated the purpose of the Bidders' Conference, as follows:

This RFP is for Older American Act funded Programs. The Florida Department of Elder Affairs has determined that Area Agencies on Aging must competitively bid contracts for OAA Title III Services at least once every six years in accordance with applicable state and/or federal regulations.

To coincide with this regulation, the Area Agency on Aging of Broward County is requesting proposals for the calendar year 2026, as the first of a six-year cycle. Continuation funding, for years two through six, is contingent upon performance, need for the service, and the availability of funds.

She informed the group that the conference was being taped to allow for an accurate record of the meeting.

The Planning Director continued with a review of the RFP Deadlines and General Information as follows:

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AVAILABILITY OF REQUEST FOR PROPOSALS:

RFP Applications will remain open until Wednesday, July 2, 2025, 5:00 P.M. (EDT).

SUBMISSION OF WRITTEN QUESTIONS:

The deadline for submission of written questions concerning the RFP is Wednesday, May 21, 2025 at 12:00 p.m.

All questions should be submitted to [RFP@adrcbroward.org](mailto:RFP@adrcbroward.org)

SUBMISSION OF NOTICE OF INTENT

The deadline for submission of a Notice of Intent to submit a proposal is Friday, May 23, 2025.

ADDENDUM TO RFP RESPONSES TO WRITTEN QUESTIONS

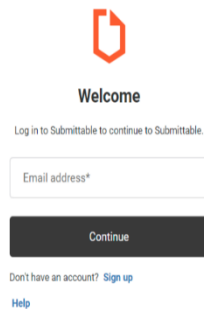
The deadline for addendums to RFP and responses to written questions is Monday, June 9, 2025.

SUBMISSION OF PROPOSAL

- Responses are required through the Submittable Platform
- 3 bound hard copies of each response to the Request for Proposal must be submitted by the Applicant to AAABC, 5300 Hiatus Road, Sunrise, FL 33351
- Submission deadline is Wednesday, July 2, 2025 at 5:00 P.M. (EDT)

SUBMITTAL SIGN –IN

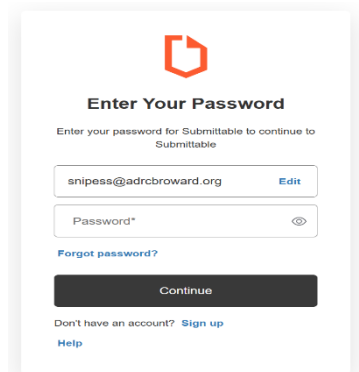
If you already have a Submittable account, enter your account-associated email address



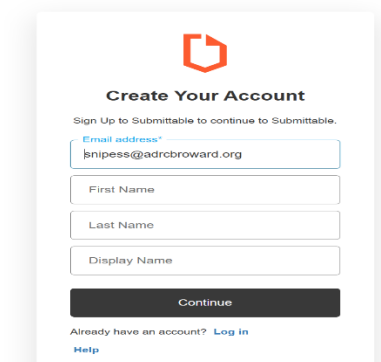
The image shows a login form for Submittable. At the top is the Submittable logo, an orange stylized 'S'. Below it is the word 'Welcome'. Underneath is a small line of text: 'Log in to Submittable to continue to Submittable.' This is followed by a text input field labeled 'Email address\*'. Below the input field is a dark grey button with the word 'Continue' in white. At the bottom, there is a link that says 'Don't have an account? Sign up' and a smaller link below it that says 'Help'.

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Enter your password to sign in. If you don't remember your password, use the "Forgot password" link.

The screenshot shows a login interface with the Submittable logo at the top. Below the logo is the heading "Enter Your Password" and a subtext "Enter your password for Submittable to continue to Submittable". There is a text input field containing the email "snipess@adrcbroward.org" with an "Edit" link to its right. Below this is a "Password\*" input field with a toggle icon. A "Forgot password?" link is positioned below the password field. At the bottom of the form is a dark "Continue" button. Below the button are two links: "Don't have an account? Sign up" and "Help".

If you don't have a Submittable Account, you can create a free account by clicking Sign up

The screenshot shows a registration interface with the Submittable logo at the top. Below the logo is the heading "Create Your Account" and a subtext "Sign Up to Submittable to continue to Submittable.". There are four text input fields: "Email address\*" (containing "snipess@adrcbroward.org"), "First Name", "Last Name", and "Display Name". A dark "Continue" button is located below these fields. At the bottom of the form are two links: "Already have an account? Log in" and "Help".

### FATAL FLAW REVIEW

A Fatal Flaw Review will be conducted by the AAABC Staff on Thursday, July 3, 2025 through the Submittable Platform.

### REQUEST FOR PROPOSAL REVIEWS

- The Proposal Review Committee will be comprised of representatives of the AAABC Board, Staff Members, and members of other community organizations.
- The Proposal Review Committee will convene Monday, July 7<sup>th</sup> – Friday, July 18<sup>th</sup>

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NOTICE OF CONTRACT AWARDS

Notice of Intent to award contracts will be posted on AAABC website (adrcbroward.org) on Monday, August 4, 2025.

NOTICE OF INTENT TO APPEAL

The Area Agency on Aging of Broward County has an existing Appeals Policy in the event of an appeal. Notices of Intent to Appeal the Award must be submitted to:

Charlotte Mather-Taylor, Chief Executive Officer  
Area Agency on Aging of Broward County  
5300 Hiatus Road, Sunrise Florida, 33351

Notice of Intent to Appeal must be hand delivered or sent certified mail, return receipt requested. The envelope should be marked "Notice of Intent to Appeal". Notices of Intent to Appeal must be submitted by Wednesday, August 6, 2025, 5:00 P.M. (EDT)

RFP INFORMATION

- All requested information must be submitted
- No page limit
- All documents must be signed in **blue ink or Digitally Signed using Adobe or other product**
- Copies – 3 copies (bound in 3-ring binder, 1 copy must be marked "ORIGINAL"). Applicant can print copy of Submittable submission as the hard copy.
- The envelope or box should be securely sealed, and marked on the outside with the Service Program Number and Name
- Section IV of RFP includes the Program Number and Name
- There are 9 Service Programs

Ms. Shahnaaz Yasin, Chief Grants Officer, continued with a review of the 9 Service Programs (RFP pages 47 – 55). She discussed the following on each Service Program:

- Geographic Areas Covered
- Funding Sources – Please note: IIIB - Services has a minimum requirement for access and in-home services. All services definitions are in the most recent DOEA Program and Services Handbook.
- Range of funding – AAABC intent is to award the highest amount in the contract but due to the current status we will not know exact dollar amounts until we receive the DOEA 2026 Contract.
- Local Match in OAA Contract – Required match is 10%, however, no match is required for Title IIID.
- General Revenue (State Funding) – Local Service Program (LSP) – at the time of the preparation of this RFP, the General Revenue (State Funding) – Local Service Program (LSP) is uncertain. Therefore, the contract may be amended after award.

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**REVIEW OF SERVICE PROVIDER APPLICATION PROGRAM MODULE  
REQUIREMENTS**

Ms. Elizabeth Lombardo, Program Director, AAABC Broward, reviewed the Submittable Platform Service Provider Application Program Module.

She informed attendees that the form in Submittable was created from the Service Provider Application (SPA) format.

The start of the application request an upload of the five fatal flaw items (see page 57 of the RFP).

Each applicant is required to select a program service area. A separate application must be completed for each program service area. The contract period is January 1, 2026 – December 31, 2026.

The initial questions in the Submittal form are extracted from the Service Provider Application (SPA) Service Provider Summary Information Page.

The remaining order of the Submittable Form follows the original Service Provider Application. The boxes on the form are expandable. Questions can be answered in a word document and copied and pasted in the Submittable Form. Ms. Lombardo continued with a review of each section of the Program Module as follows:

Demographic, Needs Assessment, and Community Care Service System: Applicant must include an overview of the demographic characteristics, social and economic needs of the older adult population, as well as the methods used to determine service needs.

Consumer Identification: Applicant must describe Targeting and Outreach Strategies. Please note: Outreach is a requirement under the Older Americans Act whether or not it is a funded service.

Eligibility and Assessment/Reassessment Process: Applicant must refer to the most recent DOEA Program and Services Handbook (see link to handbook on AAABC website: [adrcbroward.org/about-us/public-notice](http://adrcbroward.org/about-us/public-notice)) for the eligibility and assessment/reassessment requirements.

Client Prioritization Process for Reducing or Terminating Services: Applicant must describe how clients will be prioritize, served, and the termination process. The process of how community referrals will be handled both to and from your organization also should be included in the response.

Quality Assurance: Applicant must include a description of consumer satisfaction and the internal evaluation Process.

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Training: Applicant must include a description of Staff training and on boarding process. Also, attach a 12-month training plan.

Description of Service Delivery: The Submittable Form will allow the input of multiple services. Applicants must include descriptions, location, days of operation, and sample calendar/schedule of activities. If the answer is “yes” to a new service, a New Provider Business Plan is required.

Process for Handling and Reporting Client Complaints, Grievances, and Appeals: Applicants must make sure a clear process is described. A complaint is a general expression of grief, pain or dissatisfaction. A grievance is a formal expression of dissatisfaction with a decision to reduce or terminate services by the provider that the client does not agree with. An appeals process follows a grievance.

Reporting: Applicants must describe the process utilized for the ongoing, accurate and timely entry of all units/clients, including process designed to ensure accuracy, and schedule for running reports. Make sure when describing services that tracking mechanisms are included.

Client Confidentiality: Applicants must include plans to protect data and ensure Staff is trained on HIPAA Policy.

Employee Screening and Security: Applicants must perform a Level II Background Screening on all employees and maintain all back up documentation.

Disaster Preparedness: Applicants must include a description of plans to prepare for all types of disasters. A new bidder is required to attach a full copy of the Disaster Plan.

Volunteer Plan: Applicants must include procedures on recruitment, training, utilization and retention of volunteers to assist with agency function. Volunteers that are providing 20 or more hours of services must be background screened, if providing less than 20 hours a monthly verification must occur and be documented.

Organizational Chart & Job Descriptions: Applicants must attach an approved organizational chart and job descriptions illustrating the structure and relationship of positions, units, supervision and function of the agency.

Funding Sources: Applicants must include a list of all current funding sources, including the AAABC.

Goals, Objectives and Performance Measures: Applicants must review the list of Goals and Objectives in the RFP (See pages 20-28). Select a minimum of 2 Goals and a total of 5 objectives that relate to the services offered and are most achievable. Develop strategies to attain the defined goals and objectives. If identified, please include outcomes/output performance measures. Selected vendors will be required to submit quarterly updates on the achievement of the selected goals.

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**REVIEW OF SERVICE PROVIDER APPLICATION CONTRACT MODULE  
REQUIREMENTS**

Ms. Shahnaaz Yasin, Chief Grants Officer, AAABC Broward, reviewed the Submittable Platform Service Provider Application Contract Module and Excel Unit Cost Methodology Worksheets.

She informed attendees, that The Department of Elder Affairs require all providers to use the Unit Cost Methodology Template. It is a three (3)-tab spreadsheet in Excel consisting of the Personnel Allocation Worksheet, Cost Allocation Worksheet and Supporting Budget Worksheet.

Personnel Allocation Worksheet – Applicant must list all agency staff and available hours for each staff member on the Personnel Allocation Worksheet. The required information provided must be in sufficient detail, accurate and complete. Staff time should be allocated to the appropriate category. The Total time allocated for direct service personnel should equal 100% of the available work hours. In no case should time allocated to services exceed 100% of the net available work hours.

Cost Allocation Worksheet – Applicant must verify that allocated Wages from the Personnel Allocation Worksheet are on the Cost Allocation Worksheet. The Cost Allocation Worksheet submitted reflects all services provided and includes all costs associated with those services regardless of funding source. Costs must be allowable, reasonable and necessary. Costs should be allocated to the appropriate category. The total cost allocated for each line item should equal 100% of the proposed budget total. In no case should total allocated costs exceed 100% of the proposed budget total.

Supporting Budget Worksheet – Applicant must verify that the allocated budgeted costs, budgeted units, and cost per unit of service from the Cost Allocation Worksheet are on the Supporting Budget. All calculation are correct and the form has been completed correctly in Sections 1, 2, and 3 of the Supporting Budget Worksheet.

The Provider Support in the budget is to confirm the availability of non-federal and non-general revenue (local) financial participation in Section 4 of the Supporting Budget Worksheet. Confirm that Provider Match (cash and in-kind) is at least 10% of the Total Contract Budget in Section 5 of the Supporting Budget Worksheet.

Reviewers will be checking to confirm that the Contract Unit Rate per service is competitive and does not exceed the Budgeted Cost per Unit of Service in Section 6 of the Supporting Budget Worksheet. The Total Budgeted Support must be equal to the Total Budgeted Costs in Section 7 of the Supporting Budget Worksheet. The estimated number of unduplicated clients to be served should be completed in Section 8 of the Supporting Budget Worksheet.

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<b>BIDDERS' CONFERENCE QUESTIONS</b>		
	<b>QUESTIONS</b>	<b>RESPONSES</b>
Katrina Davenport, SCSEFP	Service Program #1 is listed as Southeast/Southcentral. Everything we have done up until this point has been under the name Southcentral/Southeast.	We will make the correction in the RFP Document. Please note that the LIVE Application cannot be changed at this time.
Silvia Aguilar, SWFP	Under Service Program #2 Does IIIIE Funding include Adult Day Care? Caregiver Training and Support – Individual and/or Group is the only service listed.	A minimum 3% of IIIIE Funding is required for Caregiver Training and Support – Individual and/or Group. Once the 3% threshold has been met other services can be proposed. Please see most recent DOEA Program and Services Handbook for a listing of other services.
Robin Martin, Rebuilding Together	When you call it Home Improvement Program to which exact services are you referring to. Under prior contracts it was split between Chore and Home Improvement. Does it include Chore or does it not include Chore. There are distinct definitions in the RFP, Chore (pg10) and Home Improvement (pg. 15). Has it shifted?	It is called Home Improvement Program. If the services you are referring to are listed in the most recent DOEA Program and Services Handbook and are funded by IIIB or IIIE they can be proposed by the applicant.
Robin Martin, Rebuilding Together	Did the total amount change for Service Program #7 – Home Improvement Program from the prior RFP? It seems lower.	Yes, the total amount is less as at this date and time we have less money to allocate.
Sarah Barker, Coast to Coast Legal Aid	If you are under one service program for III- EG. Do we need to do a separate program request for III-ES?	Yes. A separate application should be submitted for each one.
Katrina Davenport, SCSEFP	I noticed on the Service Program Descriptions there is no call for provider match.	The Provider 10% Match requirement is included on the Service Program Descriptions. Under each IIIB or IIIE funding source the stated amount of available federal dollars if noted is followed by the required 10% match amount. The Provider Match should be included in the Unit Cost Methodology Worksheets.

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		There is a line for provider match and the required local match as well as the federal.
Kasia Nowak, City of Margate/NWFP	You said that we should select the maximum from the range for the federal portion, then there is 10% but it is not really 10% it is a little more than that.	The % is calculated from the total amount. Example, if the total contract was \$100,000 the 10% would be \$10,000 and the 90% would be \$90,000. It is not 10% of the \$90,000 it is 10% of the whole \$100,000. That is how the calculations were determined.
Sandra Valdes, Catholic Charities	In regards to Service Program #1 (Southeast/Southcentral) Are you saying that at least 55% have to be in-home services?	Service Program #1 – A minimum required 55% Access Services, and minimum required of 5% in-Home Services.
Jeanette Gonzalez, Easter Seals	What are access services?	Access Services are Transportation, Outreach, Information and Referral, and Case Management. All services are listed in the most recent DOE Program and Services Handbook.
Katrina Davenport, SCSEFP	Do we sign in blue ink or can we sign with DocuSign?	DocuSign is fine. Please note the 3 hard copies must be submitted. One must be marked “Original” with original signatures in “blue ink”.
Robin Martin, Rebuilding Together	What is the difference between ACH and Agency?	This section identifies where payment will be sent. To the Agency or through ACH direct deposit. If it is sent to the Agency you will receive a physical check mailed to you.
	If we are a new applicant will we select “yes” that it is a new service, even if we have been delivering it in the community?	Yes. As a new applicant we need to know your capacity to deliver the service.
Sandra Valdes, Catholic Charities	It was stated earlier that the boxes are expandable. It was also stated that we can print from the submission. When we print will it print all of the text?	Yes.
Sandra Valdes, Catholic Charities	Will Submittable allow us to share the draft?	Yes. Click on Manage Collaborators Button (located in the top right corner above the provider’s name) of your application

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		once you have started. Click Collaborators – add email addresses of individuals you'd like to collaborate with in real-time. They will receive a link and have access to the form until you complete your submission. As the owner, only you will be able to submit. Submittal Platform technical help can be accessed by clicking the question button on the top right next to the user account initials.
Silvia Aguila, SWFP	Where exactly do we find the fatal flaws?	The Fatal Flaws are located in the RFP document, page 57.
Silvia Aguila, SWFP	What is the timeframe for the application?	The application time frame is for one (1) year, January 1, 2026 – December 31, 2026.
Silvia Aguila, SWFP	The services that we add to the form, is it normally the services that we will claim units for?	Yes, if you are not planning to offer a new service or a change.
Christine Sainvil, Easterseals	It was stated to choose 2 Goals, do we have to choose all 5 objective under those goals?	No. Select a minimum of 2 Goals and a total of 5 Objectives (between the 2 goals) that relate to the services offered and are most achievable.
Sandra Valdes, Catholic Charities	In looking at the service descriptions under access services, only outreach and transportation is listed. Does that mean case management is not included?	Additional services may be proposed. A complete listing of OAA Funded Services may be found in the most recent DOEA Program and Services Handbook.
Sarah Barker, Coast to Coast Legal Aid	You mentioned at the beginning, if we want to apply for funding in 2 service programs, we have to submit two applications.	Yes. A separate application is required for each service program.
Katrina Davenport, SCSEFP	LSP is on this BID, but it is a separate contract and a separate contract period. Should it still be a part of our unit cost?	No. Do not include LSP Dollars in your Unit Cost Methodology (UCM).
Silvia Aguilar, SWFP	What is the maximum amount allowed for subcontractors?	There is no maximum amount for subcontractors. If you have a subcontractor please list the name and the cost in the budget. You will explain how you will use the

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		subcontractors in the Service Provider Application.
Robin Martin, Rebuilding Together	In reference to Service Program #7 (Home Improvement) we discussed that both Chore and Home Improvement are sub categories or services; Outreach, Screening & Assessment is that meant to be included in the whole thing or should we separate them out? When we perform, outreach services and go to homes to identify people who need services should we be billing that under an access service (outreach) or is that meant to be included as a budget in the whole thing?	Outreach is a required service under the Older Americans Act whether it is funded or not. If you are going to propose Outreach as a funded service you would include it in your unit cost methodology. If you are going to provide Chore and Outreach then you allocate your cost to each of those services and propose a contract rate for each service.
Terry Lieberman, NWFP	Looking back at our last RFP, we completed 5 different Unit Cost Methodology Worksheets. Do you want one unit cost for each year we are proposing?	No. Complete the Unit Cost Methodology Worksheet for one year.
Sandra Valdes, Catholic Charities	Where are the unit cost methodology videos located?	The unit cost methodology videos are located on AAABC website: <a href="http://adrcbroward.org/about-us/public-notice">adrcbroward.org/about-us/public notice</a> .
	<b>Written Question</b>	
Iani Carvalho, Catholic Charities	In looking at the geographic area to be served by each of the RFP service programs, It would be helpful to have a map of Broward County showing the boundaries of each program. Is this something that can be available as a resource?	Each service program page has a description of each geographic area. The boundaries are clear if you look at a Broward County map. We did not create a specific map for this RFP.