

APPENDIX IX

CCE Lead Agency Designation Period: July 1, 2025 - June 30, 2030

Contract Period: July 1, 2025 - June 30, 2026

CCE REQUEST FOR PROPOSAL EVALUATION INSTRUMENT

This document is a public record.

County: _____ Applicant(s): _____

Reviewer (name printed): _____

Reviewer (signature): _____ Date: _____

Point Value	Description
4	Exceeds expectations. Demonstrates highest level of compliance with the RFP requirements. The presentation is superior in its detail, responsiveness, quality, clarity and organization.
3	Exceeds minimum expectations. Demonstrates good compliance with the RFP requirements in a consistent manner; information is accurate; presentation is clear, understandable and concise.
2	Meets minimum expectations. Demonstrates minimal compliance with the RFP requirements. The presentation is unclear and / or inconsistent in some areas.
1	Fails to meet minimum expectations. Demonstrates insufficient compliance with RFP requirements.
0	RFP is incomplete. Required item(s) not included; inadequate or no justification provided for omission included in RFP.

The full proposal evaluation instrument includes this page and the following components:

- 1) Program Module
- 2) Contract Module
- 3) Organizational Capability
- 4) Rating Summary Sheet

Elder Options CCE RFP Evaluation Instrument

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4 - Exceeds expectations, 3 - Exceeds minimum expectations, 2 - Meets minimum expectations, 1 - Meets minimum expectations, 0 - RFP is incomplete

Item #	PROGRAM MODULE ITEM	APPLICANT 1	APPLICANT 2
1	Demographic and Community Care Service System	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and detailed manner.		
	Bidder's proposal addresses key elements related to:		
	1) Understanding of characteristics of residents in the service area.		
	2) Accepting referrals and serving residents throughout the entire service area.		
	3) Capability to administer and manage Programs for Community Care for the Elderly (CCE), Home Care for the Elderly (HCE), and Alzheimer's Disease Initiative (ADI).		
	4) Participatation in local networks and consortiums where hospitals, home health, social and medical providers are represented in order to target high-risk individuals in need of services.		
	5) Includes strategies for gaining input from the public in agency's planning process. Addresses how agency will reach out to the community for feedback when significant program service changes are being considered (i.e. discontinuation of service or change in model being used to provide services).		
2	Consumer Identification	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Outreach		
	2) ADRC integration		
	3) APS-H referrals		
	4) Aging Out and Adult Protective Services (APS) moderate and low risk referrals		
	5) Adherence to ARTT requirements		
3	Case Management Functions	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Initial and annual activities and requirements		
	2) Staffing plan		
	3) ADRC communications and related assessment, enrollment, and service provision activities		
	4) Provision of program and service information to clients		
	5) Access of DOEA funded and non-funded programs for active and wait listed clients		
	6) State Medicaid Managed Care Long Term Care (SMMC LTC) services		

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Item #	PROGRAM MODULE ITEM	APPLICANT 1	APPLICANT 2
	7) Alternate resources		
	8) Co-payments		
4	Services	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Planned services		
	2) Subcontractors		
	3) Subcontractor Monitoring Schedule		
5	Quality Assurance	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Methods and procedures		
	2) How results are used to improve services/service delivery		
	3) Required Case Management training		
	4) Client satisfaction policies and procedures		
6	Consumer Adverse Incident, Complaint, and Grievance Procedures	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Adverse Incident procedures		
	2) Complaint procedures		
	3) Grievance Appeal procedures		
7	Reporting	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) eCIRTS data entry, policies and procedures, and integrity		
8	Client Confidentiality and Security	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner.		
	Procedures, practices, and processes appear to meet all state program guidelines.		
	Bidder's proposal addresses key elements related to:		
	1) Employees, service providers, and volunteers		
	2) HIPAA		
	3) Privacy Notice		

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Item #	PROGRAM MODULE ITEM	APPLICANT 1	APPLICANT 2
	4) eCIRTS identification number 5) SSN disclosure 6) E-verify 7) Background screening		
9	Disaster Preparedness	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner. Procedures, practices, and processes appear to meet all state program guidelines. Bidder's proposal addresses key elements related to: 1) Disaster plan overview		
10	Volunteer Plan	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner. Procedures, practices, and processes appear to meet all state program guidelines. Bidder's proposal addresses key elements related to: 1) Recruitment, training, utilization and retention		
11	Organizational Chart	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner. Procedures, practices, and processes appear to meet all state program guidelines. Bidder's proposal addresses key elements related to: 1) Approved organizational chart with structure and relationship of positions, units, supervision and functions of the agency		
12	Description of Service Delivery (by Service)	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner. Procedures, practices, and processes appear to meet all state program guidelines. Bidder's proposal addresses key elements related to: 1) Section is complete 2) Plans meet program requirements		
13	Goals and Objectives	MAXIMUM POINT VALUE = 4	
	Bidder presented material in a clear, concise, and thorough manner. Procedures, practices, and processes appear to meet all state program guidelines. Bidder's proposal addresses key elements related to: 1) DoEA's five key goals 2) The strategies and actions address compliance and improve quality assurance		
14	Availability of Documents, Certifications and Assurances, and Resolution of Authority	MAXIMUM POINT VALUE = 4	
	All documents are dated and signed by the authorized individual		
Total Rating:			

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Item #	CONTRACT MODULE ITEM	APPLICANT 1	APPLICANT 2
1	Personnel Allocations Worksheet	MAXIMUM POINT VALUE = 4	
	The Personnel Allocations Worksheet submitted lists all agency staff and available hours for each staff member. The required information provided is in sufficient detail, accurate and complete. Staff time is allocated to the appropriate category.		
2	Unit Cost Worksheet	MAXIMUM POINT VALUE = 4	
	Appropriate wages and salary information is linked from the Personnel Allocations Worksheet. The Unit Cost Worksheet submitted reflects all services provided by bidder and includes all costs associated with those services regardless of funding source. Costs appear to be allowable, reasonable and necessary.		
3	Supporting Budget Worksheet by Program - Units	MAXIMUM POINT VALUE = 4	
	The Supporting Budget Worksheet tracks to the units of service and total cost calculated on the Unit Cost Worksheet. All calculations are correct and the form has been completed correctly.		
4	Supporting Budget Worksheet by Program - Match	MAXIMUM POINT VALUE = 4	
	The matching funds categories (cash and in-kind) are at least 10% of the "Adjusted Budgeted Costs". The required form to document the bidder's commitment to match the state funds are properly completed, signed by the person authorized to bind the bidder to contractual agreements and dated.		
5	Supporting Budget Worksheet by Program - Unit Cost	MAXIMUM POINT VALUE = 4	
	For each service the adjusted cost per unit of service is competitive and does not exceed the maximum rate allowed for the current contract year.		
6	Match Calculation	MAXIMUM POINT VALUE = 4	
	Total match and in-kind across all items noted on the UCM are a minimum of 10%.		
	Total Rating:		

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Item #	ORGANIZATIONAL CAPABILITY ITEM	APPLICANT 1	APPLICANT 2
1	Organizational Chart & Job Descriptions	MAXIMUM POINT VALUE = 4	
	Bidder submitted copies of its organizational chart and job descriptions for all positions indicated on the Personnel Allocations Worksheet. It is clear from these documents that proper lines of supervision and adequate staffing are in place.		
2	Personnel Policies Statement	MAXIMUM POINT VALUE = 4	
	Bidder submitted a statement certifying its current Personnel Policies meet the minimum requirements specified in the RFP under "Personnel Standards and Employee Benefits" section.		
3	Audit	MAXIMUM POINT VALUE = 4	
	A copy of the most recent audited financial statements and compliance reports package was submitted. There were no significant findings or questioned costs and all recommendations made by the independent auditor to improve internal controls were implemented. Overall financial condition is strong.		
4	Board Roster & By Laws	MAXIMUM POINT VALUE = 4	
	A current board roster and/or current roster of legal governing body and corporate bylaws were submitted. Board composition, in general, reflects that of the county where service is to be rendered. The bylaws provide for board oversight and involvement in all aspects of the agency.		
5	Articles of Incorp. & IRS Determination	MAXIMUM POINT VALUE = 4	
	Copies of the articles of incorporation and the IRS determination letter granting tax exempt status (if applicable) were submitted.		
6	IRS 990	MAXIMUM POINT VALUE = 4	
	A copy of the most recent IRS Form 990 (Not for Profit) was submitted (if applicable). Overall financial condition is strong.		
7	Certificate of Insurance(s)	MAXIMUM POINT VALUE = 4	
	A certificate(s) of insurance is provided. The bidder has General Liability, Professional Liability, Automobile Liability Hired/Non-Owned, Auto for Owned Vehicles, if applicable and Worker's Compensation Insurance, at a minimum. Coverage at a minimum is as follows: \$1M/\$2M General Liability; \$1M/\$3M Professional Liability; \$500K Auto Liability.		
8	Administrative Assessment Checklist	MAXIMUM POINT VALUE = 4	
	The Administrative Assessment Checklist was submitted. All items were answered. Indication is given the agency adheres to sound fiscal and administrative standards for its operations.		
9	Certification of 30 days operating funds	MAXIMUM POINT VALUE = 4	
	Certification of the availability of 30 days operating funds was provided in a signed statement.		

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Item #	ORGANIZATIONAL CAPABILITY ITEM	APPLICANT 1	APPLICANT 2
10	Monitoring Reports	MAXIMUM POINT VALUE = 4	
	The "new bidder" agency submitted the requested monitoring reports: two fiscal and two programmatic reports. Resolution of problems identified in the report were addressed appropriately.		
11	Reference Letters	MAXIMUM POINT VALUE = 4	
	The "new bidder" agency submitted a letter of reference from a major funder addressing the agency's management capabilities, accountability of funds and service provision.		
12	Documentation of Experience	MAXIMUM POINT VALUE = 4	
	The agency forwarded documentation of experience they have had in provision of service(s) 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. If the Bidder has not provided service(s) in the State of Florida, service history elsewhere is submitted as support documentation. The Bidder supplied contact person(s), name, address, telephone number of contracting agencies.		
13	Transition Plan Statement	MAXIMUM POINT VALUE = 4	
	The "new bidder" agency forwarded a statement agreeing to forward a transition plan the day after the bid award.		
Total Rating:			
<div style="border: 1px solid black; background-color: yellow; padding: 5px; width: fit-content;"> NOTES: </div>			

APPENDIX IX
ELDER OPTIONS
CCE RFP
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RATING SUMMARY SHEET

County: _____ Applicant(s): _____

Reviewer Name (printed): _____

Program Module	New Bidder	Current Lead Agency
Total Rating:		
Divided by Number of Questions:	14	14
Section Total:		
Weight	50%	50%
Contract Module		
Total Rating:		
Divided by Number of Questions:	6	6
Section Total:		
Weight	30%	30%
Organizational Capability		
Total Rating:		
Divided by Number of Applicable Questions:	13	10
Section Total:		
Weight	20%	20%

TOTAL WEIGHTED SCORE (by component)

Program Module (50%)		
Contract Module (30%)		
Organizational Capability (20%)		
TOTAL WEIGHTED SCORE:		

Printed name and signature of staff who calculated score:
