

ALLIANCE FOR AGING, INC.

THE AREA AGENCY ON AGING
FOR
MIAMI-DADE AND MONROE COUNTIES

**ALZHEIMER'S DISEASE INITIATIVE
2026 REQUEST FOR PROPOSAL**

ADDENDUM #1

to

2026 Request for Proposal (RFP)

March 30, 2026



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DESCRIPTION
Section D.2 Replaced
APPENDIX VII Added

Section D.2 is replaced with the following:

1. Scoring the Application

The scoring proposal is made up of 5 scoring sections. Four of the Scoring Sections are within Part A, Program Module and the fifth is the score from Part B, Contract Module. The Overall Scoring Methodology is described below.

The Overall Score uses the following scoring calculation methodology as follows:

- 50% - Section II.A
(General Requirements)
- 10% - Section III.A
(Outcome Measures)
- 10% - Section IV.A.
(Outreach & Experience)
- 10% - Section V.A
(Organizational Capabilities)
- 20% - Average Score of Part I.B and II.B
(Unit Cost Methodology & Availability of Documents)

The section score is determined by a sum of the questions divided by the number of questions within that scoring section. The scoring sections related to Part A, Program Module, will be reviewed and scored by 3 reviewers. A mathematical average score of the three reviewers will be used in the final scoring tally. The scoring sections pertaining to Part B, Contract Module, will be reviewed and scored by one reviewer. The scoring for Part B will consist of the weighted average of the five possible scoring sections: The Case Management Rate, the three parts of the UCM, and the Availability of Documents.

- The Case Management rate is scored as follows: The lowest rate from all the applicants receives 3 points, the next lowest rate from all the applicants receives 2.5 pts, the next lowest receives 2 points, and so on until there are no points left to give.

Should a rate for Case Management not be submitted in the Unit Cost Methodology, the application will be considered non-responsive and will no longer be considered for potential contract. Should a rate not be developed in the UCM for any of the other services planned to be provided as submitted in Section II.B of the application, there will be a scoring reduction for those missing rates.

Supporting documentation for Personnel costs and Subcontractor costs must be submitted as stipulated in Section II.B.1 of the Service Provider Application, Appendix IV.

As per Section B.2.f, after the initial contract period, the selected applicant may only increase its unit rate for any service it is awarded by the rate of inflation as determined by the Consumer Price Index (CPI) percentage change for all items as determined by the Bureau of Labor Statistics for the preceding 12 months.

The maximum point value for each scoring question and each scoring section is 3.0. The scores for each of the scoring sections are weighed and then combined into the final Overall Score. The scores and rankings of the applications will be presented to the Alliance President and CEO who, in turn, will make a recommendation to the Alliance Board of Directors which has ultimate authority to approve ADI Agency contracts awarded pursuant to this RFP.

For Miami-Dade County

For Miami-Dade County, the Alliance intends to award three ADI Agency contracts unless there are fewer than three qualified applicants. Qualifications are ascertained by a total weighted score of 2.0 or higher.

If there are more than three applicants with a total weighted score of 2.0 or more, the Alliance will award ADI contracts in Miami-Dade County to the three applicants with the highest total weighted scores. Ties will be decided by the number of years of experience as a case management agency providing services specifically for the AD population as evidenced by collaboration with a Memory Disorder Clinic and/or direct or subcontracted operation of a Specialized Adult Day Care with the applicant with the greatest number of years' experience being awarded the contract.

If there are less than three applicants for Miami-Dade County with a total weighted score of 2.0 or higher, only the applicant(s) with a total weighted score of 2.0 or higher will be awarded the ADI contracts.

For Monroe County

For Monroe County, the Alliance intends to award an ADI contract to one applicant. Qualifications are ascertained by a total weighted score of 2.0 or higher.

If there is more than one applicant with a total weighted score of 2.0 or more, the Alliance will award an ADI contract in Monroe County to the applicant with the highest total weighted score. Ties will be decided by the number of years of experience as a case management agency providing services specifically for the AD population as evidenced by collaboration with a Memory Disorder Clinic and/or direct or subcontracted operation of a Specialized Adult Day Care with the applicant with the greater number of years' experience being awarded the contract.

Overall

The Alliance reserves the right to reject any and all applications if it is deemed to be in the best interest of the Alliance, the State of Florida, and/or the current or potential ADI program participants in PSA 11.

In the event that a contract is awarded based on the information submitted in response to this RFP that is found to be false, financial consequences and/or termination of the contract may result.

ATTACHMENT VII – REVIEWER SCORING TEMPLATES is added:

ALLIANCE FOR AGING, INC.
2026 ADI RFP
PROPOSAL EVALUATION INSTRUMENT

This document is a public record.

COVER

Applicant	
Evaluator	
Date:	

Place scores only in the yellow highlighted cells for each question

Scoring Points:

Generally the point values follow the below descriptions. For most questions, the point value is described and specific to each question within the scoring worksheets. The evaluator is expected to use sound judgement in thinking through responses in order to determine which point value to assign.

Point Value	Description
3	Exceeds expectations. The response expands upon the minimum requirements and is presented in a consistent, clear, understandable, and concise manner.
2	Meets minimum expectations. The response meets minimum requirements.
1	Fails to meet minimum expectations. The response is insufficient, unclear, and inconsistent in some areas.
0	Response is incomplete or inadequate. Required item(s) not included and/or inadequate.

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

1. General Requirements
2. Outcome Measures
3. Outreach & Experience
4. Organizational Capabilities

For each instrument, unless otherwise instructed in the Comments, meeting the full requirements of each section is required to assign the point value. Failure to meet the full requirements of a section may result in a point value of zero for that section.

ALLIANCE FOR AGING, INC.
2026 ADI Program Module
General Requirements
Evaluation Instrument
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Applicant
Evaluator

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Item #	PROGRAM MODULE - General Requirements	Maximum Point Value	RATING	COMMENTS
Referrals and and Community Care Service System				
II.A.1	a. The applicant described its ability to accept referrals and provide services countywide through reviewing, managing, and demonstrating service delivery outcomes. The response included: 1. specific strategies, 2. staffing models / adequate staffing (direct or subcontracted) 3. operational workflows	3		3 pts = Applicant explained its ability to accept referrals and provide services countywide through reviewing, managing, and demonstrating service delivery outcomes and included all three required elements. 2 pts = The explanation was provided but excluded one of the three required elements 1 pt = The explanation was provided but excluded two of the three of the required elements. 0 pts = The response did not explain its ability to accept referrals and provide services or the response was left blank.
	b. The applicant described how it will manage and oversee a coordinated service network (direct service and/or subcontractors) to ensure quality, compliance, and service delivery outcomes. The response included: 1. its quality assurance processes, 2. its subcontractor monitoring tools and corrective action protocols, 3. the data it will collect and analyze to evaluate performance	3		3 pts = Applicant described how it will manage a coordinated service network system (direct service and/or subcontractors) and included all three requirements: 1) quality assurance, 2) subcontractor monitoring tools / Corrective action protocols, 3) data collected to analyze & evaluate performance. 2 pts = The explanation was provided but excluded one of the three required elements 1 pt = The explanation was provided but excluded two of the three required elements. 0 pts = The response did not include any of the three required elements, did not address the subject, or was left blank.
Client Identification and Activation				
II.A.2	a. The applicant describe what it will do to inform individuals with AD or related memory disorders and their caregivers about available services. The response included: 1. its planned participation in Memory Disorder Clinic activities, 2. outreach to hospitals and social and medical providers, and 3. potential involvement in the Dementia Care and Cure Initiative hosted by the DOEA and the Alliance.	3		3 pts = Applicant described what it will do to inform individuals with AD or related memory disorders and their caregivers about available services and included all three response requirements. 2 pts = The explanation was provided but excluded one of the three required elements 1 pt = The explanation was provided but excluded two of the requirements. 0 pts = The response did not include any of the three required elements, did not address the subject, or the response was left blank.
	b. The applicant described its process for referral to the ADRC The response included: - the steps and criteria it will use to determine if the referral is appropriate.	3		3 pts = Applicant described its process for referral to the ADRC including the steps and criteria the agency will use to determine if the referral is appropriate. 2 pts are not offered for the response- 1 pt = Applicant described its process, however, left out the steps and criteria the agency will use to determine if the referral is appropriate. 0 pts = Applicant did not address the subject, or the response was left blank
	c. The applicant described its procedures for reviewing its monthly ADI budget and requesting timely referrals of wait-listed clients from the ADRC. The response included: 1. how it determines the number and frequency of referral requests needed to meet monthly target expenditures. 2. how it will manage the average monthly Per-Member-Per-Month 3. how it will maintain a monthly target caseloads consistent with the average PMPM and contracted funding..	3		3 pts = Applicant described its procedures for reviewing its monthly ADI budget and requesting timely referrals of wait-listed clients from the ADRC and included all three response requirements 2 pts = The explanation was provided but excluded one of the three required elements 1 pt = The explanation was provided but excluded two of the three required elements. 0 pts - The explanation was provided but excluded all three required elements, did not address the subject, or the question was left blank.
	d. The applicant described how it will process referrals from the ADRC for new client enrollments including each step from the initial receipt of the referral through all required and documented actions for eligibility determination. The response included: 1. clearly outlined workflow 2. documentation requirements 3. internal controls for accurate & timely completion of the eligibility process.	3		3 pts = Applicant described how it will process referrals from the ADRC for new client enrollments including each step from the initial receipt of the referral through all required and documented actions for eligibility determination and included all three of the requirements elements. 2 pts = The explanation was provided but excluded one of the three required elements 1 pt = The explanation was provided but excluded two of the three required elements. 0 pts = The explanation was provided but excluded all of the required elements, did not describe address the subject, or the response was left blank
Case Management Functions				

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2026 ADI Program Module
Outreach & Experience
Evaluation Instrument
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Applicant	0
Evaluator	0

Item #	Program Module - Outreach & Experience	Maximum Point Value	RATING	COMMENTS
OUTREACH				
IV.A	Applicant provided a detailed description, in narrative form, of how it plans to conduct outreach events or activities in the community to identify individuals who have the greatest economic or social need, particularly low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas. The description included the specific number of outreach events or activities it plans to conduct at a minimum each year	3		3 pts = The Applicant provided detailed description of how it plans to conduct outreach events in the community and the description included the minimum number of outreach events it plans to conduct semi-annually . 2 pts = The description did not include the minimum number of events it plans to conduct annually. 1 pt = The description was brief and did not provide details on how it plans to conduct outreach events in the community or the minimum number of events it plans to conduct annually. 0 pts - The response did not address the subject or was left blank
EXPERIENCE				
V.A.1	a. Applicant indicated the years of experience it has in providing each services that are being applied for and the funding source for that service.	3		3 pts = 2 or more years of experience and included each service being applied for and the related funding sources 2 pts - 2 or more years of experience but failed to include all of the services being applied for or the related funding sources . 1 pt = The description was brief and failed to include the services and funding sources. 0 pts = The response did not address the subject, there is no experience providing services, or the response was left blank.
	b. Applicant provided a detailed explanation of how these services were rendered, including the administrative aspects of the program.	3		3 pts =The explanation was thorough and provided detail description of how the services listed above were rendered and included the administration aspect. 2 pts - The explanation was fairly comprehensive, but left out certain details such as the administration aspects. 1 pt = The description was brief and did not provide details about the administration aspects. 0 pts = There is no experience in providing services, the response did not address the subject, or was left blank.
	c. Applicant provided at least 1 letter of reference from a funding entity, excluding the Alliance for Aging which included: 1. the size and scope of the program, 2. any form of disciplinary action taken (if any), 3. and a indication of any programmatic surplus (including total dollar amount of surplus) which demonstrated proper use of the funding allocation. The letter of reference was submitted in the applicant's Exhibit folder.	3		3 pts = Reference provided (excluding Alliance) which included all three required elements 2 pts = Reference provided (excluding Alliance) but failed to include one of the three required elements. 1 pt - Reference provided (excluding Alliance) but failed to include any of the three required elements 0 pts - No Reference (excluding the Alliance letter was provided
V.A.2	Was the applicant placed on any form of corrective action by any funding source(s) for any reason since January 2020. In addition, a document explaining the funding source and circumstances and if resolved, documentation from funding source verifying that the reason(s) for the corrective action status have been resolved, and that the agency is in good standing.	3		3 pts =Applicant has not been placed on any form of corrective action by any funding source(s) for any reason since January 2020. 2 pts - Applicant had previous Corrective Action but the Corrective Action was explained and provided documentation that it is resolved and in good standing 1 pt = Applicant has Corrective Action and provided no explanation and documentation that its been resolved and they are in good standing. 0 pts - Applicant is not in good standing with another funding source, or response was left blank.
V.A.3	The applicant operated a program through any funding source where they have had a surplus of the total contract value at the end of the contract period with any contract since June 2023	3		3 pts = No surplus indicated in response 2 pts are not offered for this response. 1 pts = Applicant did have surplus at the end of a contract since June 2023, 0 pts = Response was left blank
V.A.4	The applicant or any person associated with the applicant in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, or position involving the administration of funds was terminated by any funding source(s) for cause. If Yes, an additional document specifying the funding source and the circumstances was included in the Exhibit File. If yes, a copy of any termination letter was included in the Exhibit File.	3		3 pts = No fundinfng source terminated funds for cause as a result of person's associated with the applicant 2 pts = yes with both forms of documentation attached and the reason for termination was not criminal in nature 1 pt = yes with no copy of termination letter attached to application 0 pts = The response was left blank
Total Rating:			0	
Divided by Number of Questions			7	
Section Total:			0.00	

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Item #	PROGRAM MODULE - General Requirements	Maximum Point Value	RATING	COMMENTS
II.A.3	a. The applicant described how, and the extent to which, it has provided a minimum of two years of case management experience within the last three years. And more specifically providing Case Management services to the AD or related diagnosis populations.	3		3 pts = Applicant described how it has provided a minimum of two years of case management experience servicing individuals with AD or related memory diagnosis populations. 2 pts or 1pt are not offered for this response 1 pts =Applicant described how it has provided a minimum of two years of case management experience but failed to be specific about individuals with AD or related memory disorders 0 pts =The response did not address the subject, or the response was left blank
	applicant met the minimum 2 year requirement	YES or NO		Enter YES (all caps) if applicant meets the two year minimum requirement for Case Management. Enter NO (all caps) if not. Note: Keep scoring the application even if the answer is no.
	b. The applicant described the average timeline for consumer assessment, care plan development, and service initiation. The response included: 1. Case Manager to client ratio 2. how its timelines comply with the requirements of Chapter 2 of the DOEA Handbook.	3		3 pts = Applicant described the average timeline for client assessment, service care plan development, and service initiation and specifically addressed both the required elements. 2 pts are not offered for this response 1 pt = The description was provided but failed to include one of the required elements, 0 pts = The description was provided but failed to include both of the required elements, did not address the subject, or the response was left blank.
	c. The applicant described its process for coordinating all resources through DOEA funded and non-DOEA funded programs to meet consumer needs. The response included an explanation of how case managers identify, integrate, and monitor these resources to ensure a comprehensive and least-restrictive care plan.	3		3 pts = Applicant described its process of coordinating all resources accessible through DOEA funded and non-DOEA funded programs to meet client need and included how case managers identify, integrate, and monitor these resources to ensure a comprehensive and least-restrictive care plan. . 2 pts nor 1 pt are not offered for this response 1 pt - the description was provided but failed to include how case managers identify, integrate, and monitor these resources to ensure a comprehensive and least-restrictive care plan. .. 0 pts - the description was provided but failed to include how case managers identify, integrate, and monitor these resources to ensure a comprehensive and least-restrictive care plan., the response did not address the subject, or the response was left blank.
	d. The applicant described how it will identify, explore, utilize and document alternative resources for consumer services prior to utilizing DOEA-funded ADI services. The response clearly outlined the procedures case managers will follow to verify the availability of other funding sources and ensure that ADI funds are used only when no other funding options remain.	3		3 pts - applicant described how it will identify, explore, utilize and document alternative resources for consumer services prior to utilizing DOEA-funded ADI services and included procedures case managers will follow to ensure that ADI funds are used only when no other funding options remain.. 2 pts are not offered for this response 1 pt - the description excluded procedures case managers will follow to ensure that ADI funds are used only when no other funding options remain.. 0 pts - applicant did not address the subject or the response was left blank.
	e. The applicant described its internal procedure for assessing, billing, collecting, and reporting co-payments in a timely manner. The response included: 1. an outline of the workflow and documentation requirements 2. the means to coordinate with other service providers that may also assess co-payments to avoid duplication 3. internal controls used to ensure compliance with DOEA Co-Pay Guidelines.	3		3 pts = applicant described its internal procedure for assessing, billing, collecting, and reporting co-payments in a timely manner and included all three of the required elements. 2 pts - The description missed one of the three elements. 1 pt - The description missed two of the three elements. 0 pts = The description did not include any of the three elements, did not address the subject, or the response was left blank
Services				
II.A.4	a. The applicant completed the List of Services Proposed indicating intent to subcontract (if at all) for: 1. Center Based Services 2. Non Center Based Services	3		3 pts = applicant completed the List of Services Proposed indicating intent to subcontract (if at all) for Center Based services 2 pts nor 1 pt are offered for this response 0 pts = applicant did not complete the List of Services Proposed indicating intent to subcontract (if at all) or response was left blank
Service Delivery and Coordination				

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Item #	PROGRAM MODULE - General Requirements	Maximum Point Value	RATING	COMMENTS
II.A.5	a. The applicant described how it will provide each service listed in section II.A.4 of the application. The response included: 1. which service will be delivered directly and which will be provided by subcontractors 2. operational capacity to ensure consistent Countywide service delivery.	3		3 pts = applicant described how it will provide each service listed in section II.A.4 of the application and included which will be provided directly or subtracted AND a description of their organization capacity to deliver services countywide 2 pts nor 1 pt are offered for this response. 0 pts = the description did not include how it will provide the services, did not include identifying which services are direct or subcontracted, did not include a description of its organizational capacity to deliver services countywide or response was left blank
	b. The applicant describe its experience collaborating with a Memory Disorder Clinics to provide services. The response included: 1. The number of years of collaboration 2. types of services coordinated 3. the outcome/benefit of the relationship with the clinics to the AD population	3		3 pts = applicant described its experience collaborating with a Memory Disorder Clinics to provide services and included all three of the required elements. 2 pts = the description was provided, however one of the three elements specified was missing. 1 pt = the description was provided, however two of the three elements specified were missing. 0 pts = all three of the three details were missing, the description was not provided, or the response was left blank
	c. For at least one Adult Day Care Center, the applicant is licensed to provide Specialized Alzheimer's Disease Day Care AND provided documentation evidencing the specialty license. Monroe County Applicants receive the full three points automatically.	3		Because there is no Specialized Adult Day Care licensed issue in Monroe County, give the full three points for any <u>application for Monroe County</u> . For <u>Miami-Dade applications</u> : 3 pts = evidence was provided that at least one ADC holds this specialty license. 2 pts nor 1 pt are offered for this response 0 pts = no evidence was provided that at least one ADC holds the specialty license.
Quality Assurance and Training				
II.A.6	a. The applicant described its procedures to evaluate the quality of services delivered directly by ADI staff. The response included: 1. survey methodology 2. sample size 3. frequency of administration	3		3 pts = applicant described its procedures to evaluate the quality of services delivered directly and included all three required elements. 2 pts = applicant described its procedures to evaluate the quality of services delivered directly however one of the three elements was missing. 1 pt = applicant described its procedures to evaluate the quality of services delivered directly however two of the three elements were missing 0 pts = all three of the details were missing, the response did not address the subject, or the response was left blank.
	b. The applicant described its procedures to evaluate the quality of services delivered by any subcontractor. The response included: 1. survey methodology 2. sample size 3. frequency of administration	3		3 pts = applicant described its procedures to evaluate the quality of services delivered by a subcontractor and included all three required elements. 2 pts = applicant described its procedures to evaluate the quality of services delivered by a subcontractor, however one of the three elements was missing. 1 pt = applicant described its procedures to evaluate the quality of services delivered by a subcontractor however two of the three elements were missing 0 pts = all three of the elements were missing, the response did not address the subject, or the response was left blank.
	c. The applicant explained its data collection and tabulation processes of the survey results. The response included; 1. the analysis of results, 2. the identification of trends 3. the corrective action procedures implemented when dissatisfaction with ADI Agency staff or Subcontractor services is identified 4. the methods used to verify that all necessary corrections have been completed to ensure the consistent delivery of high quality services.	3		3 pts -applicant explained its satisfaction survey process and included all four of the required elements. 2 pts = Response included all but one of the four required elements. 1 pts = Response included only three of the four required elements. 0 pts = Response was missing three of more of the required elements, did not address the subject, or was left blank.
	d. The applicant explained how the results of its quality assurance process, covering both ADI Agency staff and subcontractors, have been and will be used to improve services.	3		3 pts = applicant explained how the results of its quality assurance process for both direct staff and subcontractors will be used to improve services 2 pts nor 1 pt are offered for this response 0 pts = applicant did not provide the explanation or the response was left blank

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Item #	PROGRAM MODULE - General Requirements	Maximum Point Value	RATING	COMMENTS
e.1	The applicant described its plan to provide the required pre-service staff training to include the minimum standards/topics as outlined in Appendix A of the DOEA Handbook. The response included: - Details on training topics - training delivery methods - timelines (training schedule) - verification of completion	3		3 pts = applicant described its plan to provide the required pre-service staff training and included: 1) the minimum standards/topics as outlined in Appendix A of the DOEA Handbook, 2) details of training topics 3) training delivery methods. 4) training schedule 5) how it verifies the training was completed (verification). 2 pts = applicant described its plans for pre-service training that included all but one of the five elements listed. 1 pt = applicant described its plans for pre-service training that included all but two of the five elements listed. 0 pts = applicant provided a description but included only two one of the five required elements, did not address the subject, or left the response blank.
e.2	The applicant described its plan to provide the required six (6) hours of in-service training annually to case management staff. The response included: 1. the minimum standards/topics as outlined in Chapter 2 of the DOEA Handbook. 2. assurance of timely completion 3. Documentation that tracks training hours 4. verification of staff completion	3		3 pts = applicant described its plan to provide the required six hours of in-service training to case management staff and included all four of the required elements. 2 pts = applicant described its plans for six hours of in-service training that included all but one of the four elements listed. 1 pt = applicant described its plans for pre-service training that included only two of the four elements listed. 0 pts = applicant provided description but included only one of the four required elements, did not address the subject, or left the response blank.
e.3	The applicant described its plan to collaborate with a Memory Disorder Clinics in the development of staff training. The response included: 1. how the collaboration will be used to identify training needs 2. how the collaboration will enhance staff competencies 3. how the collaboration will help to ensure that training content reflects current best practices in serving individuals with AD and related disorders.			3 pts = applicant described its plan to collaborate with a Memory Disorder Clinics in the development of staff training and included all three required elements 2 pts = applicant described its collaboration with memory disorder clinics for training, however, only two of the three elements listed were included. 1 pt = applicant described its collaboration with memory disorder clinics for training, however, only one of the three elements listed were included. 0 pts = applicant described its collaboration with memory disorder clinics for training, however did not include any of the three required element, did not address the subject, or left the response blank.
Client Complaints, Grievances, & Appeals				
a.	The applicant described its process for receiving, documenting, reporting, and remediating client complaints. The response included: 1. how's the complaints are logged 2. timeline of response 3. staff roles and responsibilities 4. communication with the consumer 5. methods used to ensure that corrective actions are implemented and verified.	3		3 pts = applicant described its process for receiving, documenting, reporting, and remediating client complaints and included all five of the required elements. 2 pts = the process was described but failed to include one of the five elements listed 1 pt = the process was described but failed to include two of the five elements listed 0pts = the process was described but failed to include three or more of the five elements listed, did not address the subject, or left the response blank.
II.A.7 b.	The applicant described its process for handling client grievances including appeals regarding denial, reduction, or termination of services. The response included: 1. An outline the steps in the grievance and appeal process 2. required timeframes, 3. documentation standards, 4. communication protocols with consumers, 5. methods used to ensure compliance with DOEA requirements and due process protections	3		3 pts = applicant described its process for handling client grievances including appeals regarding denial, reduction, or termination of services and included all five of the required elements. 2 pts = applicant described the process for handling grievances, however, only included four of the five elements required. 1 pt = applicant described the process for handling grievances, however, only included three of the five elements required 0 pts = applicant described the process for handling grievances, however, only included two or fewer of the five elements required, did not address the subject, or left the response blank.
Reporting				

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Applicant
Evaluator

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Item #	PROGRAM MODULE - General Requirements	Maximum Point Value	RATING	COMMENTS
II.A.8	a. The applicant described the steps it will follow in order to provide for accurate and timely entry of all service and client specific information in the CIRT database. 1. internal workflows, 2. staff roles and responsibilities, 3. data verification procedures, 4. supervisory review processes, 5. methods used to ensure compliance with the monthly reporting deadline.	3		3 pts = applicant described the steps it will follow in order to provide for accurate and timely entry of all service and client specific information in the CIRT database and included all five of the required elements. 2 pts = described its data entry process, however, only included four of the five elements required 1 pt = described its data entry process, however, only included three of the five elements required 0 pts = described its data entry process, however, only included two or fewer of the five elements required, did not address the subject, or left the response blank.
	b. The applicant described its method for validating and reconciling service units from service authorization to service delivery. The response included: 1. how service authorizations are issued and tracked, 2. how delivered units are verified against authorizations, 3. how discrepancies are identified and resolved, 4. how final billing is reconciled to ensure accuracy and prevent over or under billing.	3		3 pts = applicant described its method for validating and reconciling service units from service authorization to service delivery and included all four of the required elements.. 2 pts = applicant described its method but failed to include one of the four required elements 1 pt = applicant described its method but failed to include two of the four required elements 0 pts = applicant described its method but failed to include three or more of the four required elements, did not address the subject, or left the response blank.
Confidentiality				
II.A.9	a. The applicant described what security measures are in place to ensure client confidentiality and to meet state and federal requirements, including HIPAA. The response included: 1. staff training 2. data protection protocols, 3. breach notification procedures, 4. any additional safeguards used to protect consumer information.	3		3 pts = applicant described what security measures are in place to ensure client confidentiality and to meet state and federal requirements, including HIPAA and included all four of the required elements. 2 pts = applicant provided a description but failed to include one of the four required elements 1 pt = applicant provided a description but failed to include two of the four required elements 0 pts = applicant provided a description but failed to include three or more of the four required elements, did not address the subject, or left the response blank
Eligibility and Data Security				
II.A.10	a. The applicant described its procedures to ensure that all required employees are properly verified and determined eligible for hire through the U.S. Department of Homeland Security's E-Verify system. The response included: 1. internal controls, 2. documentation practices, 3. staff responsibilities, 4. any quality assurance measures used to ensure full compliance with E-Verify requirements.	3		3 pts = Applicant described its procedures to ensure that all required employees are properly verified and determined eligible for hire through the U.S. Department of Homeland Security's E-Verify system and included all four of the required elements. 2 pts = applicant describe its procedure but failed to include one of the four required elements 1 pt = applicant describe its procedure but failed to include two of the four required elements 0 pts = applicant describe its procedure but failed to include three or more of the required elements, did not address the subject, or left the response blank
	b. The applicant described its procedures to ensure that all staff, volunteers, or subcontractors who meet the definition of direct service providers are properly screened and determined to have no disqualifying offenses prior to rendering services. The response included: 1. internal controls, 2. documentation practices, 3. screening timelines, 4. Clearinghouse processes, 5. any quality assurance measures used to ensure full compliance with Sections 430.0402 and Chapter 435, F.S.	3		3 pts = Applicant described its procedures to ensure that all staff, volunteers, or subcontractors who meet the definition of direct service providers are properly screened and determined to have no disqualifying offenses prior to rendering services and included all five of the required elements. 2 pts = Procedure was described but failed to include one of the five required elements. 1 pt = Procedure was described but failed to include two of the five required elements. 0 pts = Procedure was described but failed to include three or more of the five required elements, did not address the subject, or was left blank.

ALLIANCE FOR AGING, INC.
2026 ADI Program Module
General Requirements
Evaluation Instrument
This document is a public record.

Applicant
 Evaluator

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Item #	PROGRAM MODULE - General Requirements		Maximum Point Value	RATING	COMMENTS
	c.	The applicant described its procedures for the proper storage, protection, security and preservation of source documentation, and valid backup and retention of electronic data. The response included: 1. physical and electronic safeguards, 2. access controls, 3. backup schedules or logs, 4. disaster recovery processes, 5. any quality assurance measures used to ensure the integrity and availability of program records.	3		3 pts = Applicant described its procedures for the proper storage, protection, security and preservation of source documentation, and valid backup and retention of electronic data and included all five of the required elements. 2 pts = Applicant described its procedure but failed to include one of the five required elements. 1 pt = Applicant described its procedure but failed to include two of the five required elements. 0 pts = Applicant described its procedure but failed to include three or more of the five required elements, did not address the topic, or left the response blank.
Disaster Preparedness					
II.A.11	a.	The applicant provided a summary of its disaster plan. The plan included the following key points: 1. Designation of a Disaster Coordinator and alternate. 2. Plans for contacting all at-risk clients, on a priority basis, prior to and immediately following a disaster. 3. Plans to receive referrals, conduct outreach, and deliver services, before and after a disaster, to persons who may or may not be current clients. 4. Plans for after-hours coverage of network services, as necessary. 5. Plans to help at-risk clients register with the Special Needs Registry of the local emergency management agency.	3		3 pts = Applicant provided a summary of its disaster plan that included all 5 required elements 2 pts = Applicant provided a summary of its disaster plan however, did not include one of the five required elements 1 pt = Applicant provided a summary of its disaster plan however, did not include two of the five required elements. 0 pts = Applicant provided a summary of its disaster plan however, did not include three or more of the five required elements, did not address the topic, or left the response blank
Volunteer Plan					
II.A.12	a.	The applicant provided a written plan of action on how it will recruit, train, utilize, and retain volunteers to assist with the agency's AD functions and include: 1. Recruitment Strategies 2. orientation and training processes 3. Supervision and Support structures 4. Volunteer roles and responsibilities 5. Methods for retention	3		3 pts = Applicant provided a written plan of action on how it will recruit, train, utilize, and retain volunteers to assist with the agency's AD functions and included all five required elements. 2 pts = Applicant provided a summary of its disaster plan however, did not include one of the five required elements 1 pt = Applicant provided a summary of its disaster plan however, did not include two of the five required elements. 0 pts = Applicant provided its plans of action however, did not include three or more of the five required elements, did not address the subject, or was left blank.
Organizational Chart					
II.A.13	a.	The applicant described how its organizational structure is sufficient to support the functional requirements of the ADI program including case management functions and eCIRTS data entry and maintenance. The response included: 1. an explanation of reporting relationships, 2. staffing levels, 3. supervisory oversight, 4. an explanation of how the structure ensures accountability, continuity of operations, and compliance with all ADI program requirements.	3		3 pts = Applicant described how its organizational structure is sufficient to support the functional requirements of the ADI program including case management functions and eCIRTS data entry and maintenance and included all four of the required elements. 2 pts = Applicant provided the description but failed to include one of the four required elements. 1 pt = Applicant provided the description but failed to include two of the four required elements. 0 pts = Applicant provided the description but failed to include three or more of the four required elements, did not address the subject, or left the response blank .
Funding Sources					
II.A.14	a.	The applicant provided a list of current funding sources.	3		3 pts = Applicant listed current funding sources 2 pts nor 1 pt are offered for this response 0 pts = Applicant did not list current funding sources
	b.	A letter was submitted from each funding source listed above indicating whether the applicant is in good standing.	3		3 pts = At least one letter from each funding source listed in II.A.14.a. indicating that the applicant is in good standing was provided 2 pts = one or more of the of the letters from the funding sources did not indicate the applicant is in good standing 1 pt = Letters were submitted, but non of them indicated the applicant is in good standing. 0 pts = No letters were submitted.
Total Rating:				0	
Divided by Number of Questions				35	
Section Total:				0.00	

ALLIANCE FOR AGING, INC.
2026 ADI Program Module
Outcome Measures
Evaluation Instrument
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Applicant	0
Evaluator	0

Item #	Program Module - Outcome Measures	Maximum Point Value	RATING	COMMENTS
Outcome Measures & Standards				
III.A.1	Outcome Measure 1 - Applicant clearly described its strategies/Action Steps, Outcomes, and the Outputs/Inputs to achieve or exceed the standard outcome measures established by DOEA on all three measures.	3		3 pts = clearly described and is logical, practical, doable. 2 pts = described with less clarity, less practicality, and less doable. 1 pt = responded without clarity, practicality, nor is doable 0 pts = left blank
III.A.2	Outcome Measure 2 - Applicant clearly described its strategies/Action Steps, Outcomes, and the Outputs/Inputs to achieve or exceed the standard outcome measures established by DOEA on all three measures.	3		3 pts = clearly described and is logical, practical, doable. 2 pts = described with less clarity, less practicality, and less doable. 1 pt = responded without clarity, practicality, nor is doable 0 pts = left blank
III.A.3	Outcome Measure 3 - Applicant clearly described its strategies/Action Steps, Outcomes, and the Outputs/Inputs to achieve or exceed the standard outcome measures established by DOEA on all three measures.	3		3 pts = clearly described and is logical, practical, doable. 2 pts = described with less clarity, less practicality, and less doable. 1 pt = responded without clarity, practicality, nor is doable 0 pts = left blank
III.A.4	Outcome Measure 4 - Applicant clearly described its strategies/Action Steps, Outcomes, and the Outputs/Inputs to achieve or exceed the standard outcome measures established by DOEA on all three measures.	3		3 pts = clearly described and is logical, practical, doable. 2 pts = described with less clarity, less practicality, and less doable. 1 pt = responded without clarity, practicality, nor is doable 0 pts = left blank
III.A.5	Outcome Measure 5 - Applicant clearly described its strategies/Action Steps, Outcomes, and the Outputs/Inputs to achieve or exceed the standard outcome measures established by DOEA on all three measures.	3		3 pts = clearly described and is logical, practical, doable. 2 pts = described with less clarity, less practicality, and less doable. 1 pt = responded without clarity, practicality, nor is doable 0 pts = left blank
Total Rating:			0	
Divided by Number of Questions			5	
Section Total:			0.00	

ALLIANCE FOR AGING, INC.
2026 ADI Program Module
Organizational Capabilities
Evaluation Instrument
This document is a public record.

Applicant
 Evaluator

Item #	Program Module - Organizational Capability	Maximum Point Value	RATING	COMMENTS
1	Organizational Chart The applicant submitted an officer signed as certified copy of the organizational chart illustrating the structure and relationship of all positions	3		3 pts = Org Chart submitted that is officer signed as certified 1 pt = Org Chart submitted but not signed by officer as certified 0 pts = No Org Chart submitted
2	Job Descriptions Copies of job descriptions for all key staff involved in the performance of this contract, including management, was submitted.	3		3 pts = Job descriptions for key staff were submitted 0 pts = no job descriptions, or not all of the key staff job descriptions were submitted
3	Audited Financial Statements A copy of the two (2) most recent consecutive audited financial statements and compliance reporting package (including auditor's management letter and management response) was submitted	3		3 pts = Two most recent audit reports (including management letter and management response) were submitted. 0 pts = Neither or only one audit was submitted..
4	Hierarchical Structure A full roster of all current members of your Board of Directors or an equivalent hierarchical leadership structure (for each member include contact information independent of applicant's corporate address).	3		3 pts = Hierarchical Document was submitted (including contact information for each member independent of applicants corporate address) 0 pts = any part or all of the document (including independent contract information) was missing
5	Bylaws A copy of the most recent Corporate By-Laws was submitted.	3		3 pts = The by-laws were submitted 0 pts = The by-laws were not submitted
6	Certificate of Insurance A certificate of insurance from the applicants agent, or proof of self insurance from the applicant, detailing the types of coverage currently held, the maximum dollar amount for each, and the dates when coverage became effective and is scheduled to terminate (if not self insured). This must include Liability Insurance and Workers Compensation.	3		3 pts = Certificate of Insurance (or proof of self insurance) was submitted including types of coverage, max dollar value of each, effective and termination (if not self insured) dates. Policies include both Liability and Workers Comp. 0 pts = No Certificate of insurance (or proof of self insurance) was provided, or any of the required aspects are missing - OR - No proof of Workers Compensation was included..
7	Certifications & Assurances The Certifications & Assurances (Attachment II) was signed and submitted.	3		3 pts = Document was submitted signed 0 pts = Document was either not submitted or submitted unsigned.
Total Rating:			0	
Divided by Number of Questions			7	
Section Total:			0.00	

ALLIANCE FOR AGING, INC.
2026 ADI RFP
Part B Contract Module
Evaluation Instrument
This document is a public record.

Applicant
Evaluator

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Item #	Contract Module	Maximum Point Value	RATING	COMMENTS
Outcome Measures & Standards				
	Case Management Rate	3		3 pts = the lowest CM rate of all the applicants 2.5 pts = the 2nd lowest CM rate of all the applicants 2 pts = the 3rd lowest CM rate of all the applicants 1.5 pts the 4th lowest CM rate of all the applicants 1 pt = the 5th lowest CM rate of all the applicants .5 pts = the 6th lowest CM rate of all the applicants 0 pts = all applicant with a CM rate lower than the 6th lowest rate of all the applicants
II.B.1	Personnel Allocation Worksheet	3		3 pts = Was submitted, allocations appear reasonable, supported with recent pay register, no staff allocated to Allied programs aer individually listed. 2 pts = was submitted, allocations do not appear to be reasonable, supported with recent pay register 1 pt = Was submitted, but no recent pay register as support. 0 pts = Was not submitted, blank, or submitted with formulas being overwritten
	Unit Cost Worksheet	3		3 pts = Was submitted, allocations appear reasonable, subcontracted expense is supported with subcontract or document from subcontractor stating what the rate will be once contract is signed. 2 pts = Was submitted, allocations do not appear to be reasonable, subcontracted expense is support with subcontract or document from subcontractor stating what the rate will be once contract is signed. 1 pt = Was submitted with no subcontractor supporting document. 0 pts. = not submitted, blank, ort submitted with formulas being overwritten
	Support Budget Worksheet	3		3 pts = Units assigned to the service are reasonable while considering the units on the Unit Cost Worksheet 2 pts = Units assigned to the service are not reasonable while considering the units on the Unit Cost Worksheet 0 pts = Was not submitted, blank, ort submitted with formulas being overwritten
II.B.2	Availability of Documents	3		3 pts = Was submitted signed 0 pts = Was either not submitted or Submitted without signature
Total Rating:			0	
Divided by Number of Questions			5	
Section Total:			0.00	

ADI RFP Overall Scoring

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