Area Agency on Aging for North Florida, Inc.
Bidder's Conference Questions and Answers
Date: October 28,2026
Begin Time: 10:04am EST
End Time: 10:38am EST

I. Opening of Bidders Conference at 10:04am EST.

II. Attendance:

Lisa Bretz
Heather Kirwan
April Ryan
Lisa Burnham
Treveka Smith
Stormy Johnson (Virtual)
David Gauss (Virtual)
Jocelyne Fliger (Virtual)
Nicole Ballas (Virtual)

III. Purpose:

Lisa Bretz opened the meeting with the purpose of the Request for Proposals (RFP) for a newly formed Tri-County service area. One proposal will be submitted to serve Jefferson, Madison, and Taylor Counties for Older Americans Act (OAA) program Titles IIIB, C1, and C2 beginning January of 2027.

IV. Review of Procurement Site and RFP Information:

Lisa Bretz explained that the RFP information provided on the AAS website is not the application but the guidelines and required documentation. Bidders were encouraged to review Submittable account registration information and how to complete. Applications will be submitted through the Submittable website.

Heather Kirwan provided a brief review of the RFP procurement site and Submittable application site. Heather recommended that bidders ensure that any pop-up blockers are disabled to ensure that the registration windows can be accessed. If an account is already set up, the bidder will just need to log into their account. If there is no current account registered, the bidder will need to register with the Submittable system.

A visual was provided showing attendees of the RFP information located on the Advantage Aging Solution's (AAS) website. Heather provided an example of what a Submittable account reflects and that bidders may see previous submissions and can review drafts on the account.

Heather provided clarification that the registration of the account and the account profile on Submittable will not automatically provide the link to the application. Bidders will need to click the provided link from the AAS website for the current active applications.

V. Review of Key Dates of RFP Timelines:

Lisa Bretz shared with the bidders that there are some important dates with the RFP timeline. Clarification was provided that there will be no extensions to any timeline areas that are missed.

Lisa Bretz highlighted the following events:

- In order for a proposal to be considered, Bidders must ensure to submit a Notice of Intent by the provided deadline.

- Lisa clarified attendance to the Bidder's Conference was requirement for the RFP process. Failure to attended the Bidder's Conference will result in point deductions.

- The deadline for submission of the Notice of Intent is November 6th electronically through Submittable. The bidder will receive a confirmation email of the completion of the Notice of Intent.

- Bidders have only until November 6th to submit any written questions to the agency regarding the RFP.

- Responses to written inquiries will be posted on the AAS website. As a courtesy, those bidders that have submitted a Notice of Intent will receive an emailed responses and well as the posted.

- Proposals are due November 13th at 3pm EST. The Submittable portable will not accept any applications after the deadline.

- Lisa shared that AAS does have a bid review committee of five (5) individuals that will review the proposals. They will provide their recommendations to the AAS Board on December 10th, which is the next regularly scheduled Board of Directors meeting.

- Lisa reviewed that the RFP does have an appeals process. Bidders can find the information provided in the RFP documentation. The Tuesday of December 15th is the deadline to file an appeal. If the provided issues do not follow the *Provider Protest Appeal and Contract Enforcement Policy,* the bidder will receive a notification that the issues are not covered.

- The first day of service for the new contract will be Monday January 4th, 2027. The agency is aware that transition time is going to be needed for

service transition. Current provider contracts may be extended to allow for the transitionary timeframe for the new provider time to transition. AAS will provide assistance in the transitionary events to ensure that there is no interruption of services.

- Transitionary pieces that bidders may wish to be aware of:

    - Messaging of transition with a client letter template that can be provided by AAS.
    - During the transition process, AAS can resume communication as normal procedures following the end of the appeals process.

VI. Bidder's Conference Open Questions and Answers:

Lisa Bretz did share that with the verbal responses provided during the bidder's conference, AAS reserves the right to provide partial responses with time to review and addend provided response. Bidders were made aware that until response is received in written form, they are not finalized. If answers are provided that appear to be conflicting, the bidders are to notify the agency for review and clarification.

Prior to bidders' questions, Lisa requested David to provide clarification and information on the unit cost methodology of the RFP. Lisa explained that the agency has made minimum requirements in fiscal submissions to ensure fairness of potential new bidders.

David shared with bidders regarding the rates. Bidders will be outlining how the bidder will expend total OAA funding by title (IIIB, C1, C2, and NSIP) on the submitted operating chart. Once a bidder has been awarded the contract, AAS fiscal staff will be working directly with the vendor to establish by Florida County service unit rates.

Lisa provided that in the documents provided there is a form that provides information on the projected funding allocations by county and by program. Lisa clarified the "by county" is due to the funding formulas to each of the 14 counties. The budget, for this proposal, would be comprehensive for Jefferson, Madison, and Taylor. The service area identified within the Request for Proposals for the Tri- County service area of Jefferson, Madison, and Taylor counties. Bidders are not allowed to select one county for service.

David confirmed that the provided budget for how the tri-county budget would be utilized generically within an operating budget of the bidder's operating expenses. However, the bidders are to follow the RFP process by separating out the expenses by titles.

1. <u>Question:</u>

Stormy asked for clarification on the operating budget requirement. Stormy provided that currently they separate out the budget by title and by county. Is that how the proposal submission be formatted?

Response:
David provided that it is by preference. David clarified that the RFP is looking for an operating budget relative to the total funding available for the Tri-County area by title (IIIB, C1, and C2). If the bidder would like to make it more complex and separate by county, the bidder may choice to do so, but it is not required.

2. Question
   Treveka asked about the provide allocations within the RFP document if they were live numbers or just examples of possible funding.

   Response
   Lisa provided that those are current funding projections. David confirmed that these are derived from Department of Elder Affairs (DOEA) approved funding formulas.

3. Question
   Treveka followed up to her question on clarification that the budget does not have to be separated by county and can be provided as a whole.

   Response
   David confirmed that as previously stated the budget does not have to be separated by county. However, the bidders must separate the cost by programs 3B, C1, and C2.

4. Question
   Lisa Burnham asked if there are multiple bids but no selected awardee by the bid committee; does the current service provider have the opportunity to apply for a single contract?

   Response
   Lisa Bretz clarified that there will not be an opportunity for a single county contract. If there are no proposals selected for award, another RFP will be released at a following time.

5. Question
   Lisa Burnham followed up with the question of if the current service providers for Madison, Taylor, or Jefferson are interested in providing services they will need to apply for all three counties.

   Response

Lisa Bretz confirmed Lisa Burnham was correct. If a current service provider of Jefferson, Madison, or Taylor counties would like to provide OAA services the service provider will need to bid on all three counties.

6. Statement
   Lisa Bretz provided that there are some sections of the application that will require submission of policies. Lisa provided clarification that bidders can submit draft versions of the policies. Policies are closely aligned with the *Department of Elder Affairs Program and Services Handbook,* which the link of the current February 2026 copy is in the RFP documentation.

   Bidders are to refer to the handbook for the minimum expectations of the department. Bidders are be aware that this includes the Background II level requirements and which staff are required for screening.

7. Statement
   Lisa Bretz provided that there at two documents that do need to be completed in its entirety. One is the Availability of Documents which requires signature and uploaded on the application. The form must be signed and dated for uploading.

   The Organizational Capability package is a large portion of the RFP, the bidder will need to upload several documents of the organizational structure, board make up and by-laws, job descriptions, etc. If the board has approved policies including by-laws, dates of approval must be documented on the policies.

   Bidders are to ensure that the organization is currently in Sunbiz. And contact the Florida Department of State if they are not listed as an eligible entity. Bidders will need to reach out to IRS concerning 501 (c) 3 status through a determination letter.

   Bidders will need to have current insurance.

   There is an administration assessment checklist that will be uploaded in the application. It is provided in a separate document. Lisa encouraged bidders to review that assessment carefully due to sections of the assessment will be considered risk indicators and weighted accordingly.

   Each corporation that applies must provide evidence of 90 days' worth of operating funds. It can be provided through a summary of the accounts or a statement from the corporation's financial institution. Bidders are to ensure that they understand what is understood as "operating" and to submit a written inquiry if they are not confident in the understanding.

Fund development and fund raising should be considered when working on the budget. Lisa clarified that the grant funds provided are not intended to meet the entire need that the community may have for services. The organization will need to ensure that funds last for twelve months without interruption, delay, or termination of services without following proper procedures. Bidders are encouraged to review the model contract for a review of the outlined expectations listed.

8. Statement
   Lisa Bretz provided a review that AAS staff will not accept any written inquiries to personal emails or receive telephone calls related to the RFP.

   Lisa reviewed whether bidders have any questions following the bidder's conference that they have until November 6th to submit written inquiries at the provided procurement email address provided in the RFP documentation.

9. Question
   Treveka Smith asked about turn-round times for submitted inquiries.

   Response
   Lisa Bretz provided that it is provided in the timeline that written responses will be responded no later than November 10th. If the written inquiry requires a more urgent response, AAS may provide a quicker response as determined by AAS.

   Lisa reminded the bidders that responses to inquiries will be posted on the AAS website in the procurement section by November 10th. Bidders can still submit questions that were asked during the bidder's conference in written form if they wish.

10. Question
    Stormy Johnson asked about an operational question. What are bidders are capable or allowed to do if there is not already and established facility in the service area such as Madison or Taylor?

    Response
    Lisa Bretz provided that AAS will work with the awarded agency as part of the transition plan.

    The Jefferson location can be provided through the County Commissioners with a current partnership by AAS. For Madison and Taylor counties, it was encouraged for potential bidders to familiarize themselves with the current site locations to see if it may meet the agency's needs and alternative potential locations. Lisa provided the current service providers for Madison and Taylor own their own buildings are not required to allow services to be provided, but it is encouraged.

VII. Meeting Closed at 10:38am EST.