

THIS CONTRACT is entered into between the Areawide Council on Aging of Broward County, Inc., hereinafter referred to as the "Council," and **City of Pembroke Pines, Florida / Southwest Focal Point Senior Center**, hereinafter referred to as the "Contractor" who are collectively referred to as the "Parties." This Contract is subject to all provisions contained in the Master Contract JM023-10-2025, hereinafter referred to as the "Master Contract" executed between the Council and the Contractor, and its successor, incorporated herein by reference.

**WITNESSETH THAT:**

**WHEREAS**, the Council has determined that it is in need of certain services as described herein; and **WHEREAS**, the Contractor has demonstrated that it has the requisite expertise and ability to faithfully perform such services as an Independent Contractor for the Council.

**NOW, THEREFORE**, in consideration of the services to be performed and payments to be made, together with the mutual covenants and conditions hereinafter set forth, the Parties agree as follows:

**1. Purpose of Contract**

The purpose of this Contract is to provide services in accordance with the terms and conditions specified in this Contract, including all attachments, forms, exhibits, and references incorporated, which constitute the Contract document.

**2. Incorporation of Documents within the Contract**

This Contract will incorporate attachments, proposal(s), service provider application(s), grant contracts, relevant State of Florida, Department of Elder Affairs' handbooks, manuals or desk books and Master Contract, as an integral part of the Contract, except to the extent that the Contract explicitly provides to the contrary. In the event of conflict in language among any of the documents referenced above, the specific provisions and requirements of the Contract document(s) shall prevail over inconsistent provisions in the proposal(s) or other general materials not specific to this Contract document and identified attachments.

**3. Term of Contract**

This Agreement when executed will have an effective date of January 1, 2025. It will end at midnight, Eastern Standard Time on December 31, 2025.

**4. Contract Amount**

The Council agrees to pay for contracted services according to the terms and conditions of this Contract in an amount not to exceed **\$462,059.00**, subject to the availability of funds. **\$329,464.00** represents Federal Older Americans Act (OAA) Title III B funds, **\$43,867.00** represents Areawide Council on Aging (AAA) local matching funds for Title III B, and **\$88,728.00** represents Federal OAA Title III E funds. In accordance with provision of Title III of the Older Americans Act, the Contractor will contribute **\$95,285.00** to the project in matching funds. Any costs or services paid for under any other contract or from any other source are not eligible for payment under this Contract.

**5. Renewals**

By mutual agreement of the Parties, in accordance with s. 287.058(1) (g), F.S., the Council may renew this Contract for a period not to exceed three years, or the term of the original Contract, whichever is longer. The renewal price, or method for determining a renewal price, is set forth in the bid, proposal, or reply to the Council's request for Service Provider Application. No other costs for the renewal may be charged. Any renewal is subject to the same terms and conditions as the original Contract and contingent upon satisfactory performance evaluations by the Council and the availability of funds.

**6. Background Screening**

The Contractor shall ensure that the requirements of Section 430.0402 and Chapter 435, F.S., as amended, are met regarding background screening for all persons who meet the definition of a direct service provider and who are not exempt from the State of Florida, Department of Elder Affairs' level 2 background screening pursuant to Section 430.0402(2)-(3), F.S. The Contractor must also comply with any applicable rules promulgated by the State of Florida, Department of Elder Affairs and the Agency for Health Care Administration regarding implementation of Section 430.0402 and Chapter 435, F.S.

**6.1** To demonstrate compliance with this provision, Contractor shall submit Attachment VIII, Background Screening Affidavit of Compliance annually, by January 8, 2025. Further information concerning the procedures for background screening is found at <https://elderaffairs.org/about-us/background-screening/>.

**6.2 Investigation of Criminal Allegations**

Any report that implies criminal intent on the part of the Contractor or any subcontractors pertaining to the services provided under this Contract and referred to a governmental or investigatory agency must be sent to the Council. If the Contractor has reason to believe that the allegations will be referred to the State Attorney, a law enforcement agency, the United States Attorney's office, or governmental agency, the Contractor shall notify the Council immediately. A copy of all documents, reports, notes, or other written material concerning the investigation, whether in the possession of the Contractor or subcontractors, must be sent to the Council with a summary of the investigation and allegations.

**7. Nondiscrimination-Civil Rights Compliance**

**7.1** The Contractor shall execute assurances as stated in the Assurances-Non-Construction Programs, Attachment III of the Master Contract, that it will not discriminate against any person in the provision of services or benefits under this Contract or in employment because of age, race, religion, color, disability, national origin, marital status or sex in compliance with state and federal law and regulations. The Contractor further assures that all contractors, subcontractors, subgrantees, or others with whom it arranges to provide services or benefits in connection with any of its programs and activities are not discriminating against clients or employees because of age, race, religion, color, disability, national origin, marital status or sex.

**7.2** During the term of this Contract, the Contractor shall complete and retain on file a timely, complete, and accurate Civil Rights Compliance Checklist, Attachment IV.

**7.3** The Contractor shall establish procedures pursuant to federal law to handle complaints of discrimination involving services or benefits through this Contract. These procedures will include notifying clients, employees, and participants of the right to file a complaint with the appropriate federal or state entity.

**7.4** If this Contract contains federal funds, these assurances are a condition of continued receipt of or benefit from federal financial assistance, and are binding upon the Contractor, its successors, transferees, and assignees for the period during which such assistance is provided. The Contractor further assures that all subcontractors, Vendors, or others with whom it arranges to provide services or benefits to participants or employees in connection with any of its programs and activities are not discriminating against those participants or employees in violation of the above statutes, regulations, guidelines, and standards. In

the event of failure to comply, the Contractor understands that the Council may, at its discretion, seek a court order requiring compliance with the terms of this assurance or seek other appropriate judicial or administrative relief, including but not limited to, termination of and denial of further assistance.

**8. Provision of Services:**

The Contractor shall provide services in the manner described in Attachment I.

**9. Official Payee and Representatives (Names, Addresses, and Telephone Numbers):**

|    |   |  |
|----|---|--|
| a. | The Contractor name, as shown on page 1 of this Contract, and mailing address of the official payee to whom the payment shall be made is:                 | City of Pembroke Pines, Florida / Southwest Focal Point Senior Center<br>301 NW 103rd Avenue<br>Pembroke Pines, FL 33026   |
| b. | The name of the contact person and street address where financial and administrative records are maintained is:   | Jay Shechter, Project Director<br>City of Pembroke Pines, Florida / Southwest Focal Point Senior Center<br>301 NW 103rd Avenue<br>Pembroke Pines, FL 33026                 |
| c. | The name, address, and telephone number of the representative of the Contractor responsible for the administration of the program under this Contract is: | Jay Shechter, Project Director<br>City of Pembroke Pines, Florida / Southwest Focal Point Senior Center<br>301 NW 103rd Avenue<br>Pembroke Pines, FL 33026<br>954-4506-888 |
| d. | The section and location within the Council where the Request for Payment and Receipt and Expenditure forms are to be mailed or e-mailed is:              | Areawide Council on Aging of Broward County, Inc.<br>5300 Hiatus Road, Sunrise, FL 33351<br>fiscal@adrcbroward.org   |
| e. | The name, address, and telephone number of the Council's Program Specialist for this Contract is:   | Ingrid Schenk<br>Areawide Council on Aging of Broward County, Inc.<br>5300 Hiatus Road, Sunrise, FL 33351<br>(954) 745-9567  |

Upon change of representatives (names, addresses, telephone numbers) by either party, notice shall be provided in writing to the other party and the notification attached to the originals of this Contract.

**10. All Terms and Conditions Included:**

This Contract and its Attachments, I - VIII and any exhibits referenced in said attachments, together with any documents incorporated by reference, contain all the terms and conditions agreed upon by the Parties. There are no provisions, terms, conditions, or obligations other than those contained herein, and this Contract shall supersede all previous communications, representations, or agreements, either written or verbal between the Parties. By signing this Contract, the Parties agree that they have read and agree to the entire Contract.

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IN WITNESS THEREOF, the Parties hereto have caused this 36-page Contract to be executed by their undersigned officials as duly authorized.

**CONTRACTOR:**

**City of Pembroke Pines, Florida / Southwest  
Focal Point Senior Center**

**Areawide Council on Aging of  
Broward County, Inc.**

**BOARD PRESIDENT OR AUTHORIZED  
DESIGNEE**

SIGNED BY

SIGNED BY

NAME

NAME

TITLE

TITLE

DATE

DATE

FEDERAL ID NUMBER: 59-0908106

FISCAL YEAR-END DATE: September 30

DUNS: 024-485-310

**ATTACHMENT I**

**OLDER AMERICANS ACT  
STATEMENT OF WORK**

**I. SERVICES TO BE PROVIDED**

**A. Definitions of Terms**

**1. Contract Acronyms**

**AAA** - Area Agency on Aging  
**ACL** - Administration on Community Living  
**ADL** - Activities of Daily Living  
**AIRS** - Alliance of Information & Referral Systems  
**APCL** - Assessed Priority Consumer List  
**APS** - Adult Protective Services  
**CAP** - Corrective Action Plan  
**CDSME** - Chronic Disease Self-Management Education  
**CDSMP** - Chronic Disease Self-Management Program  
**CIRTS** - Client Information and Registration Tracking System  
**DBPR** - Department of Business and Professional Regulation  
**DHHS** - Department of Health and Human Services  
**DOH** - Florida Department of Health  
**DOEA** - State of Florida, Department of Elder Affairs  
**EBDPHPP** - Evidence-Based Disease Prevention and Health Promotion Program  
**I&R** - Information and Referral  
**IADL** - Instrumental Activities of Daily Living  
**NCOA** - National Council on Aging  
**NSIP** - Nutrition Services Incentive Program  
**OAA** - Older Americans Act  
**PSA** - Planning and Service Area  
**SPA** - Service Provider Application  
**USDA** - US Department of Agriculture

**2. Program Specific Terms**

**Adult Child with a Disability:** A child who is age 18 or older and is financially dependent on an older individual who is a parent of the child and has a disability.

**Child:** An individual who is not more than eighteen (18) years of age or an individual with a disability.

**Criteria:** A standard which the AoA/ACL set for the Title IID Program.

**Description of Event:** A description of what took place during the activity.

**Direct Elders Served:** The number of elders who participated in the program.

**Family Caregiver:** An adult family member, or another individual, who is an informal provider of in-home and community care to an older individual.

**Frail:** When an older individual is (1) determined to be unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cueing, or supervision or (2) unable to perform at least three such activities without such assistance; or, (3) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

**Grandparent:** A grandparent or step-grandparent of a child, or a relative of a child by blood,

marriage or adoption, who: (1) lives with the child, (2) is the primary caregiver of the child because the biological or adoptive parents are unable or unwilling to serve as the primary caregiver of the child, and (3) has a legal relationship to the child, such as legal custody or guardianship, or is raising the child informally.

**Living Healthy:** Also known as the Chronic Disease Self-Management Program (CDSMP) for the State of Florida.

**Provider:** A provider is the organization/individual actually conducting the direct service to the clients. CIRTS entries and Monthly Programmatic Report, where the provider is listed, should be the actual organization conducting the service.

**Service Provider Application:** A plan developed by the Contractor outlining a comprehensive and coordinated service delivery system, in the respective service area, in accordance with the Section 306 of the Older Americans Act (42 U.S.C. 3026), and the Council instructions.

## **B. General Description**

### **1. General Statement**

The Older Americans Act (OAA) Program is a federal program initiative that provides assistance to older persons and caregivers and is the only federal supportive services program directed solely toward improving the lives of older people.

The program provides a framework for a partnership among the different levels of government and the public and private sectors with a common objective, improving the quality of life for all older individuals by helping them to remain independent and productive.

The primary purpose of the OAA program is to foster the development and implementation of comprehensive and coordinated systems to serve older individuals. The OAA program uses these systems to assist older individuals to attain and maintain maximum independence and dignity in a home environment and allows for the capability of self-care with appropriate supportive services.

### **2. Authority**

All applicable federal laws, regulations, action transmittals, program instructions, review guides and similar documentation related to the following:

- a. Catalog of Federal Domestic Assistance Nos. 93.043, 93.044, 93.045, and 93.052;
- b. Older Americans Act of 1965, as amended 2016;
- c. Section 311 of the Older Americans Act of 1965, as amended 2016 (42 U.S.C. § 3030a);
- d. 42 U.S.C. § 303 and§ 604;
- e. Rule 58A-1, Florida Administrative Code (F.A.C.);
- f. Section 430.101, Florida Statutes (F.S.); and
- g. DOEA Programs and Services Handbook, which is hereby incorporated by reference, to include any subsequent revisions thereof.

### **3. Scope of Service**

The Contractor is responsible for the programmatic, fiscal, and operational management of the Title IIIB, Supportive Services; Title IIIC1, Congregate Nutrition Services; Title IIIC2, Home Delivered Nutrition Services; Title IIID, Evidence-Based Disease Prevention and Health Promotion Services; and Title IIIE, Caregiver Support Services programs of the OAA within its designated sector outlined in the Council-approved SPA and as specified in the Budget Summary, Attachment IV. The scope of service includes planning, coordinating and assessing the needs of older persons, and assuring the availability and quality of services. The services shall be provided in a manner consistent with and described in both the current Contractor's Council-approved SPA and the current DOEA Programs and Services Handbook.

**4. Major Program Goals**

The major goals of the OAA Program are to improve older individuals' quality of life, preserve their independence, and prevent or delay their need for costlier institutional care. These goals are achieved through the implementation of a comprehensive and coordinated service system that provides a continuum of service alternatives and effective delivery of nutritious meals that meet the diverse needs of elders and their caregivers.

**C. Clients to be Served****1. General Description**

The OAA Program gives preference to older individuals with greatest economic need and older individuals with greatest social need, with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas.

**2. Client Eligibility****a. OAA Title III**

Consumers shall not be dually enrolled in an OAA Program and a Medicaid capitated Long-Term Care Program, except consumers in need of OAA Legal Assistance services and OAA Congregate Nutrition Services, including transportation to and from congregate meal sites.

**b. OAA Title IIIB, Supportive Services**

- i. Individuals must be age sixty (60) or older; and
- ii. I&R/Assistance services are provided to individuals regardless of age.

**c. OAA Titles IIIC1 and IIIC2, Nutrition Services, General**

General factors that shall be considered in establishing priority for the receipt of nutrition services include those older persons who:

- i. Cannot afford to eat adequately;
- ii. Lack the skills or knowledge to select and prepare nourishing and well-balanced meals;
- iii. Have limited mobility which may impair their capacity to shop and cook for themselves;
- iv. Have a disabling illness or physical condition requiring nutritional support; or
- v. Have been screened at a high nutritional risk.

**d. OAA Title IIIC1, Congregate Nutrition Services**

In addition to meeting the general nutrition services eligibility requirements listed in Section I.C.2.c., individuals must be mobile, not homebound, and physically, mentally, and medically able to attend a congregate nutrition program. Individuals eligible to receive congregate meals include the following:

- i. Individuals age sixty (60) or older;
- ii. Any spouse (regardless of age) who attends the dining center with his/her eligible spouse;
- iii. Persons with a disability, regardless of age, who reside in a housing facility occupied primarily by older individuals where congregate nutrition services are provided;
- iv. Disabled persons who reside at home with and accompany an eligible person to the dining center; and
- v. Volunteers, regardless of age, who provide essential services on a regular basis during meal hours.

**e. OAA Title IIIC2, Home Delivered Nutrition Services**

In addition to meeting the general nutrition services eligibility requirements as listed in Section I.C.2.c., individuals must be homebound and physically, mentally, or medically unable to attend a congregate nutrition program. Individuals eligible to receive home delivered meals include the following:

- i. Individuals age sixty (60) or older who are homebound because of illness, disability, or

isolation;

- ii. The spouse of a homebound eligible individual, regardless of age, if the provision of the collateral meal supports maintaining the person at home;
- iii. Individuals with disabilities, regardless of age, who reside at home with eligible individuals and are dependent on them for care; and
- iv. Persons at nutritional risk who have physical, emotional, or behavioral conditions which would make their presence at congregate nutrition sites inappropriate; and
- v. Persons at nutritional risk who are socially or otherwise isolated and unable to attend a congregate nutrition site.

f. **OAA Title IID, Disease Prevention and Health Promotion Services**

- i. Target individuals age sixty (60) or older; and
- ii. Priority will be given to individuals residing in medically underserved areas.

g. **OAA Title IIIE, Caregiver Support Services**

Eligibility for OAA Title IIIE, Caregiver Support Services, is as follows:

- i. Eligible individuals include
  - (1) Family caregivers of individuals age sixty (60) or older; and
  - (2) Grandparents, age fifty-five (55) or older, or older individuals, age fifty-five (55) or older, who are relative caregivers.
- ii. For respite and supplemental services, a family caregiver must be providing care for an older individual who meets the definition of the term "frail" as defined above.
- iii. Priority will be given to family caregivers who provide care for individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction and to grandparents or older individuals who are relative caregivers who provide care for children with severe disabilities.

## II. MANNER OF SERVICE PROVISION

### A. Service Tasks

To achieve the goals of the OAA Program, the Contractor shall ensure performance of the following tasks:

#### 1. Client Eligibility Determination

The Contractor shall ensure that applicant data is evaluated to determine eligibility. Eligibility to become a client is based on meeting the requirements described in Section I.C.2.

#### 2. Targeting and Screening New Clients for Service Delivery

The Contractor shall develop and implement policies and procedures consistent with OAA targeting and screening criteria for new clients.

#### 3. Program Services

The Contractor shall ensure the provision of program services is consistent with the Contractor's current SPA, as updated and approved by the Council, and the current DOEA Programs and Services Handbook.

#### 4. Program Eligibility Requirements

##### a. Provider's Nutrition Service Operations

The Contractor shall ensure that the nutrition service operations meet the requirements of this Contract, as well as any other applicable regulations and policies prescribed by the current DOEA Programs and Services Handbook, DHHS, USDA, DOH and local health departments, DBPR, or any other agency designated to inspect meal quality for the State.

**b. Prescribed Nutritional Requirements**

The Contractor shall ensure that each meal provided under this Contract meets the following criteria:

- i. Complies with the current Dietary Guidelines for Americans, published by the Secretaries of the DHHS and USDA; and
- ii. Provides a minimum of thirty-three and a third percent (33 1/3%) of the dietary reference intakes/adequate intakes for a female age seventy (70) or older as established by the Food and Nutrition Board of the National Academy of Sciences.

**c. Food Origin and Commodities Requirements**

The Contractor may use NSIP funds to purchase foods of U.S. origin for their nutrition projects under Title III of the OAA. NSIP funds must be used to expand meal services to older adults.

**B. Use of Subcontractors**

If this Contract involves the use of a subcontractor or third party, then the Contractor shall not delay the implementation of its agreement with the subcontractor. If any circumstance occurs that may result in a delay for a period of sixty (60) days or more of the initiation of the subcontract or the performance of the subcontractor, the Contractor shall notify the Council's Program Specialist and the Council's Chief Financial Officer in writing of such delay. The Contractor shall not permit a subcontractor to perform services related to this Contract without having a binding subcontractor agreement executed. In accordance with Section 23 of the Master Contract, the Council will not be responsible or liable for any obligations or claims resulting from such action.

**1. Copies of Subcontracts**

The Contractor shall submit copies of all subcontracts to the Council's Program Specialist within thirty (30) days of execution of each subcontract agreement.

**2. Monitoring the Performance of Subcontractors**

The Contractor shall monitor, at least once per year, each of its subcontractors, sub-recipients, vendors, and/or consultants paid from funds provided under this Contract. The Contractor shall perform fiscal, administrative, and programmatic monitoring to ensure contractual compliance, fiscal accountability, programmatic performance, and compliance with applicable state and federal laws and regulations. The Contractor shall monitor its subcontractors to ensure that the budget and scope of work are accomplished within the specified time periods, and that all performance goals stated in this Contract are achieved.

**C. Staffing Requirements****1. Staffing Levels**

The Contractor shall assign staff as needed to perform the tasks, responsibilities, obligations and duties under this Contract.

**2. Professional Qualifications**

The Contractor shall ensure that the staff responsible for performing any duties or functions within this Contract have the qualifications specified in the DOEA Programs and Services Handbook.

The Contractor shall have a representative participate in conference calls and training as required by the Council.

**3. Service Times**

The Contractor shall ensure the provision of the services listed in the Contract during normal business hours unless other times are more appropriate to meet the performance requirements of the Contract, and it shall monitor its subcontractors to ensure they are available to provide services during hours responsive to client needs and during those times which best meet the needs of the relevant service

community. Normal business hours are defined as Monday through Friday, 8:00am to 5:00pm, except on holidays.

#### **4. Changes in Title IID Service Delivery Locations or Service Times**

The Contractor shall provide the Council's Program Specialist with 30 days' notice of any plan temporarily or permanently changing any Title IID service delivery location or service times. Any changes to the service delivery location or service times must have the approval of the Council's Program Specialist.

#### **5. Use of Volunteers to Expand the Provision of Available Services**

The Contractor shall ensure the use of trained volunteers in providing direct services delivered to older individuals and individuals with disabilities needing such services. If possible, the Contractor shall work in coordination with organizations that have experience in providing training, placement, and stipends for volunteers or participants (such as organizations carrying out Federal service programs administered by the Corporation for National and Community Service), in community service settings. The Contractor shall provide a quarterly report of volunteer activities and services in a format provided by the Council.

The Contractor shall involve community centers, faith based-institutions, hospitals, libraries, or community sites in its EBDPHP services coordination efforts. If the program allows lay individuals, to be facilitators, the Contractor shall aim to use volunteers vs. paid staff for EBDPHP services.

### **D. Deliverables**

The following section provides the specific quantifiable units of deliverables and the source documentation required to evidence the completion of the tasks specified in this Contract. The Contractor must submit all required documentation in the time and manner specified for the minimum performance levels to be met. Each deliverable must be accepted in writing by the Council's Program Specialist based on the requirements for each deliverable before the Contractor submits an invoice requesting payment.

#### **1. Delivery of Services to Eligible Clients**

The Contractor shall ensure the provision of a continuum of services that meets the diverse needs of elders and their caregivers. Documentation of service delivery must include a report consisting of the following: number of clients served, number of service units provided by service, and rate per service unit with calculations that equal the total invoice amount. The Contractor shall ensure the performance and reporting of the following types of services, in accordance with the Contractor's current Council-approved SPA, the current DOEA Programs and Services Handbook, and Section II.A.

##### **a. Supportive Services (IIIB Program)**

Supportive services include a variety of community-based and home-delivered services that support older individuals' quality of life by helping them remain independent and productive. Services include the following:

- i. Adult Day Care/Adult Day Health Care;
- ii. Caregiver Training/Support;
- iii. Case Aid/Case Management;
- iv. Chore and Chore (Enhanced);
- v. Companionship;
- vi. Counseling (Gerontological and Mental Health/Screening);
- vii. Education/Training;
- viii. Emergency Alert Response;
- ix. Escort;

- x. Health Support;
- xi. Home Health Aid;
- xii. Homemaker;
- xiii. Housing Improvement;
- xiv. Interpreter/Translating;
- xv. Legal Assistance;
- xvi. Material Aid;
- xvii. Occupational Therapy;
- xviii. Outreach;
- xix. Personal Care;
- xx. Physical Therapy;
- xxi. Recreation;
- xxii. Respite Services (In-Home and Facility Based);
- xxiii. Screening/Assessment;
- xxiv. Shopping Assistance;
- xxv. Skilled Nursing;
- xxvi. Specialized Medical Equipment, Services, and Supplies;
- xxvii. Speech Therapy;
- xxviii. Telephone Reassurance; and
- xxix. Transportation.

**b. Congregate Nutrition Services (IIC1 Program)**

Nutrition services are provided in congregate settings and are designed to reduce hunger and food insecurity and to promote socialization and the health and well-being of older individuals through access to nutrition and other disease prevention and health promotion services. Services include the following:

- i. Congregate meals;
- ii. Congregate meals screening;
- iii. Nutrition education; and nutrition counseling; and
- iv. Outreach.

**c. Home Delivered Nutrition Services (IIC2 Program)**

In-home nutrition services are provided to reduce hunger and food insecurity; promote socialization and the health and well-being of older individuals by assisting such individuals to gain access to nutrition and other disease prevention and health promotion services. Services include the following:

- i. Home delivered meals;
- ii. Nutrition education and counseling;
- iii. Outreach; and
- iv. Screening/Assessment.

**d. Disease Prevention and Health Promotion Services (Title IID Program)**

Evidence-Based Disease Prevention and Health Promotion (EBDPHP) services have been demonstrated through evaluation to be effective for improving health and wellbeing or reducing disease, disability, and/or injury among older adults. The ACL defines EBDPHP services as meeting highest-level criteria. Only services that meet the highest-level criteria are allowable under the IID Program. EBDPHP services must be delivered per the requirements of the program and ensure program fidelity. EBDPHP services include the following:

- i. A Matter of Balance;
- ii. Active Living Every Day;
- iii. Arthritis Foundation Exercise Program;

- iv. Arthritis Foundation Tai Chi Program (Tai Chi for Arthritis);
- v. Arthritis Self-Management Program;
- vi. Brief Intervention & Treatment for Elders (BRITE);
- vii. Chronic Disease Self-Management Program;
- viii. Chronic Pain Self-Management Program;
- ix. Diabetes Empowerment Education Program (DEEP);
- x. Diabetes Self-Management Program;
- xi. Disease Information
- xii. Enhance Fitness;
- xiii. Enhance Wellness;
- xiv. Fit and Strong!;
- xv. Healthy Eating Every Day;
- xvi. Healthy Ideas;
- xvii. Healthy Moves for Aging Well;
- xviii. Home Injury Control;
- xix. HomeMeds;
- xx. Physical Fitness;
- xxi. Powerful Tools for Caregivers;
- xxii. Program to Encourage Active Rewarding Lives for Seniors (PEARLS);
- xxiii. Programa de Manejo Personal de la Artritis;
- xxiv. Programa de Manejo Personal de la Diabetes;
- xxv. Stepping On;
- xxvi. Stay Active and Independent for Life (SAIL);
- xxvii. Tai Chi/Tai Ji Quan Moving for Better Balance (Highest-Level);
- xxviii. Tomando Control de su Salud;
- xxix. Un Asunto de Equilibrio; and
- xxx. Walk with Ease.

The Contractor must request in writing the use of any EBDPHP programs which are not listed in the DOEA Programs and Services Handbook (or Notice of Instruction) to the Council's Program Specialist or designee prior to delivering the service. If this supporting documentation is not submitted and approved by the Council, then the Council will not provide reimbursement for services.

**e. Caregiver Support Services (IIIE Program)**

The following services are intended to provide direct aid to caregivers in the areas of health, nutrition, and financial literacy, and to assist them with decision-making and problem-solving related to their caregiving roles and responsibilities:

- i. Adult Day Care/Adult Day Health Care;
- ii. Caregiver Training/Support;
- iii. Counseling (Gerontological and Mental Health/Screening);
- iv. Education/Training;
- v. Financial Risk Reduction (Assessment and Maintenance);
- vi. Outreach;
- vii. Powerful Tools for Caregivers;
- viii. Respite Services (In-Home and Facility Based);
- ix. Screening/Assessment; and
- x. Transportation.

**f. Caregiver Support Supplemental Services (IIIES Program)**

The following services are provided to complement the care provided by caregivers:

- i. Chore and Chore (Enhanced);
- ii. Housing Improvement;
- iii. Legal Assistance;
- iv. Material Aid; and
- v. Specialized Medical Equipment, Services and Supplies.

**g. Caregiver Support Grandparent Services (IIIEG Program)**

Services for grandparents or older individuals who are relative caregivers that are designed to help them meet their caregiving obligations include the following:

- i. Caregiver Training/Support;
- ii. Child Day Care;
- iii. Counseling (Gerontological and Mental Health/Screening);
- iv. Education/Training;
- v. Legal Assistance;
- vi. Outreach;
- vii. Screening/Assessment;
- viii. Sitter; and
- ix. Transportation.

## 2. Provision of Services

The Contractor shall ensure the provision of services outlined in this Contract in accordance with the DOEA Programs and Services Handbook, the Contractor's current Council-approved SPA, and the tasks described in Section II.A. of this Contract.

The Contractor shall ensure the provision of the services described in this Contract are in accordance with the current.

## 3. Service Unit

The Contractor shall ensure the provision of the services described in this Contract in accordance with the current DOEA Programs and Services Handbook at the unit rate specified in Attachment IV, Budget Summary, and the services tasks described in Section II.A. Contractor's performance will be measured on compliance with the DOEA Programs and Services Handbook and program guidelines.

The chart below lists the services allowed and the units of measurement. Units of services will be paid pursuant to the rate established in the 2025 SPA requested and approved by the Council.

| Service  | Unit of Service  |
|--|--|
| Adult Day Care<br>Caregiver Training/Support<br>Case Aid/Case Management<br>Child Day Care<br>Chore Services<br>Companionship<br>Congregate Meals Screening<br>Counseling Services<br>Enhance Fitness<br>Enhance Wellness<br>Financial Risk Reduction Services | Legal Assistance<br>Mental Health Counseling/Screening<br>Nutrition Counseling<br>Occupational Therapy<br>Personal Care<br>Physical Fitness<br>Physical Therapy<br>Program to Encourage Active, Rewarding Lives for Seniors (PEARLS)<br>Recreation |

| Service  | Unit of Service   |
|--|---|
| Health Support<br>Home Health Aide<br>HomeMeds<br>Homemaker<br>Housing Improvement<br>Interpreter/Translating  | Respite Services<br>Screening/Assessment<br>Sitter<br>Skilled Nursing Services<br>Speech Therapy<br>Stay Active and Independent for Life  |
| Emergency Alert Response   | Day   |
| A Matter of Balance<br>Active Living Every Day<br>Arthritis Foundation Exercise Program<br>Arthritis Foundation Tai Chi Program (Tai Chi for Arthritis)<br>Arthritis Self-Management Program<br>Brief Intervention & Treatment for Elders (BRITE)<br>Chronic Disease Self-Management Program<br>Chronic Pain Self-Management<br>Diabetes Empowerment Educations Program (DEEP)<br>Education/Training<br>Fit and Strong!<br>Healthy Easting Every Day<br>Healthy Eating for Successful Living in Older Adults | Healthy Ideas<br>Material Aid<br>Nutrition Education<br>Outreach<br>Powerful Tools for Caregivers<br>Program de Manejo Personal de la Artritis<br>Programa de Manejo Personal de la Diabetes<br>Specialized Medical Equipment, Services and Supplies<br>Stepping On<br>Tai Chi Moving for Better Balance<br>Telephone Reassurance<br>Tomando Control de su Salud<br>Un Asunto de Equilibrio<br>Walk with Ease |
| Escort<br>Shopping Assistance<br>Transportation  | Episode   |
| Congregate and Home Delivered Meals  | One-Way Trip  |
|  | Meal  |

Each unit of service has a unit cost. The analysis of the costs and rates is an ongoing process and is subject to change based on further analysis. A written request is required by the Contractor for any unit cost changes. The following supporting documentation is necessary for this request:

- SPA Update; and
- Justification for unit cost changes and/or units of service changes.

#### 4. Grievance and Complaint Procedures

##### a. Grievance Procedures

The Contractor shall comply with and ensure compliance with the Minimum Guidelines for Recipient Grievance Procedures, Appendix D, DOEA Programs and Services Handbook, to address complaints regarding the termination, suspension or reduction of services, as required for receipt of funds.

**b. Complaint Procedures**

The Contractor shall develop and implement complaint procedures to process and resolve client dissatisfaction with services. Complaint procedures shall address the quality and timeliness of services, provider and direct service worker complaints, and all other issues except the termination, suspension, or reduction of services, which shall be addressed through the grievance process as described in Appendix D of the DOEA Programs and Services Handbook. Complaint procedures shall include notification to all clients of the complaint procedure and include tracking the date, nature, and disposition of each complaint.

**c. Legal Provider Grievance Procedures**

The Contractor must have an internal grievance procedure that addresses both denial of service and complaints by clients about manner or quality of legal assistance. Grievance procedures that comport with the requirements of the Legal Services Corporation as provided in 45 Code of Federal Regulation (CFR) Part 1621 are sufficient to meet this standard. At a minimum, the procedure must provide applicants with:

- i. Adequate notice of the grievance procedures;
- ii. Information on how to file a grievance or complaint, and
- iii. Prompt consideration of each complaint by the Executive Director or the Executive Director's designee.

The Council may not serve in an appellate capacity or otherwise interfere in the grievance review process for legal providers. However, the Council may request that legal providers maintain a file of complaints and statements of disposition of complaints, with redacted client identifying information, for examination by the Contractor during monitoring.

**E. Reports**

The Contractor shall respond to additional, routine, or special requests for information and reports required by the Council in a timely manner as determined by the Council's Program Specialist. The Contractor shall establish reporting deadlines and due dates for subcontractors that permit the Contractor to review and validate the data and meet the Council's reporting requirements.

**1. CIRTS Reports**

- a. Contractor shall input OAA-specific data into CIRTS. To ensure CIRTS data accuracy, the Contractor shall use CIRTS-generated reports which include the following:
  - i. Client Reports;
  - ii. Monitoring Reports;
  - iii. Services Reports;
  - iv. Miscellaneous Reports;
  - v. Aging Resource Center Reports;
  - vi. Fiscal Reports; and
  - vii. Outcome Measurement Reports.

**2. SPA Update and All Revisions Thereto**

The Contractor shall submit, for approval by the Council, a SPA update, wherein the Contractor enters OAA-specific data in CIRTS.

**3. Service Cost Reports**

The Contractor is required to submit semi-annual and annual service cost reports that reflect actual costs of providing each service by program. This report provides information for planning and negotiating unit rates. The first semi-annual report encompassing the six (6) months ending 06/30/2025 is due on August 15, 2025. The second semi-annual report encompassing the twelve (12) months ending 12/31/2025 is due on February 13, 2026.

**4. Surplus/Deficit Report**

The Contractor shall submit a Surplus/Deficit Report to the Council's Program Specialist by the 5th business day of each month, in a format provided by the Council. This Surplus/Deficit Report is for all agreements and/or Contracts between the Contractor and the Council and must include the following:

- a. A list of all services and their status regarding surplus/deficit;
- b. The Contractor's detailed plan on how the surplus/deficit spending which exceeds the threshold of plus or minus one percent (+/- 1%) will be resolved;
- c. Recommendations to transfer funds to resolve surplus/deficit spending; and
- d. Input from the Contractor's Board of Directors on resolution of spending issues, if applicable.

**5. Evidence-Based Disease Prevention and Health Promotion Programmatic Reports**

The Contractor shall submit Monthly Programmatic Reports for EBDPHP services on the dates specified in Section E.5.a. of this Contract. The Council's Program Specialist will provide Contractor with an Excel report template with entry tabs for: Health and Wellness Courses/Services offered including Attestations (cumulative), Partnerships (updated as needed), and Success Stories (reported at least once each May).

- a. Information provided in the Monthly Programmatic Report must match CIRTS data and the Request for Payment. Data collected for the Monthly Programmatic Reports need to be reported during the appropriate months and subject to the following schedule:

| <u>Report #</u> | <u>Reports Due Date</u> | <u>Report #</u> | <u>Reports Due Date</u> |
|-----------------|-------------------------|-----------------|-------------------------|
| Report 1        | February 7, 2025        | Report 7        | August 7, 2025          |
| Report 2        | March 7, 2025           | Report 8        | September 5, 2025       |
| Report 3        | April 7, 2025           | Report 9        | October 7, 2025         |
| Report 4        | May 7, 2025             | Report 10       | November 7, 2025        |
| Report 5        | June 6, 2025            | Report 11       | December 5, 2025        |
| Report 6        | July 8, 2025            | Report 12       | January 8, 2026         |

- b. The Contractor shall review program documentation to ensure documentation is complete and adequately supports the information reported on the Monthly Programmatic Report prior to submitting a Request for Payment. The Contractor will attest to the review in the "Comments" section of the Monthly Programmatic Report and provide relevant information regarding the documentation as needed.
- c. Program documentation shall include all the following elements: Sign-In Sheets or Attendance Logs; flyers or documentation demonstrating efforts to recruit participants and promote EBDPHP services provided; current facilitator certificates; copy of program license (if applicable); and any forms required by the specific program.
- d. Contractor shall ensure that Sign-In Sheets or Attendance Logs accurately reflect dates, times, names of programs, participant names, and name(s) of program facilitator(s). If the Attendance Log does not include a space for participant signatures, additional program documentation must be included with participant signatures that match the participant names and dates in the Attendance Log. Exceptions may be approved by the Council's Program Specialist. Requests must be made to the Council in writing and kept with program documentation.
- e. Participants must sign their name on program Sign-in Sheets or Attendance Logs. If a participant is unable to sign their name, the instructor may sign by proxy for the participant (including their own initials and date) with a note on the Sign-In Sheet explaining the need for the proxy.
- f. The Contractor shall abide by all program fidelity requirements and have a written fidelity

monitoring plan, which includes observation of volunteer/trainer's delivery of EBDPHP services as well as observation of delivery of EBDPHP services by the Council's Program Specialist. A note will be included in the Monthly Programmatic Report, in the comments section, when a program has been observed. Documentation pertaining to the observation will be sent to the Council with Monthly Programmatic Report.

- g. CDSME Workshop data must be entered into the NCOA Force database.
- h. The Contractor shall contact the Council's Program Specialist in the event of an emergency or an exigent circumstance where the provider is unable to maintain an aspect of fidelity of the EBDPHP services (e.g., minimum or maximum number of participants) before the end of the workshop. At the discretion of the Council's Program Specialist, the service may be reimbursed under this Contract; however, if the fidelity infraction is discovered after the program has finished, during the Request for Payment Process, or as a result of a desk review, the Contractor shall not be reimbursed for the workshop or shall reimburse the Council for the cost of the workshop.
- i. The Contractor shall collaborate and partner with organizations to extend the reach of EBDPHP services. Partnerships and collaborations may be developed with Florida Department of Health, the Florida Department of Children and Families, USDA's Nutrition Program, insurance companies, Centers for Disease Control and Prevention, Area Health Education Centers, local health councils, public and private universities, federally qualified health clinics, county health departments, and Florida's Age-Friendly Communities. Partnerships shall be designed to stimulate innovation of new approaches and activities in EBDPHP services, develop greater capacity, and leverage other funding sources. Partnerships shall also address building and sustaining an infrastructure for the dissemination of EBDPHP services. This includes, but is not limited to, recruitment of trainers and participants, covering costs for licenses, and replicating program fidelity.
- j. The Contractor shall document, and provide to the Council upon request, evidence of partnerships created formally (through Memoranda of Agreement/Understanding) or informally through emails and phone calls. The Contractor will be required to keep track of partnerships in the Monthly Programmatic Report. Each month the Contractor shall review this information and provide updates to the Council as necessary.

## 6. **Quarterly Volunteer Activity Report**

The Contractor shall submit a quarterly report of volunteer activities and services in a format provided by the Council. The quarterly report schedule is as follows:

| <u>Report Period</u>    | <u>Report Due Date</u> |
|-------------------------|------------------------|
| January 1 - March 31    | April 7, 2025          |
| April 1- June 30        | July 8, 2025           |
| July 1- September 30    | October 7, 2025        |
| October 1 - December 31 | January 8, 2026        |

## 7. **Program Highlight Narratives**

The Contractor shall submit brief written narratives to the Council for publication in the Program Highlight sections of the DOEA's Summary of Programs and Services, which is hereby incorporated by reference, to include any subsequent revisions thereof. The narratives shall reference specific events that have occurred since the last submission of Program Highlight narratives, including new success stories, quotes, testimonials, or human-interest vignettes. The narratives shall be written for a general audience, with no acronyms or technical terms. For all agencies or organizations that are

referenced in the narratives, the Contractor shall provide a brief description of their mission or role. The active tense shall be consistently used in the narratives to identify the specific individuals or entities that performed the activities described in the narratives. The Contractor shall review and edit narratives for clarity, readability, relevance, specificity, human interest, and grammar prior to submitting them to the Council.

#### **F. Contractor Outreach Reporting Requirement**

The Contractor shall document its performance of outreach activities for the entire catchment area as specified in your Request for Proposal Bid Packet, by establishing a uniform reporting format that includes the following: number and type of provider events or activities; date and location; total number of participants at each event or activity; individual service needs identified; and referral sources or information provided. The Contractor shall provide a report on outreach activities quarterly. The quarterly report schedule is as follows:

| <u>Report Period</u>    | <u>Report Due Date</u> |
|-------------------------|------------------------|
| January 1 - March 31    | April 7, 2025          |
| April 1- June 30        | July 8, 2025           |
| July 1- September 30    | October 7, 2025        |
| October 1 - December 31 | January 8, 2026        |

#### **G. Records and Documentation**

1. The Contractor agrees to make available to Council staff and any party designated by the Council all Contract related records and documentation. The Contractor shall ensure the collection and maintenance of all program related information and documentation on any system designated by the DOEA and the Council. Maintenance includes valid exports and backups of all data and systems according to Council standards. Data must be usable and must be maintained in a format that is readable to the Council.
2. Each Contractor and subcontractor, among other requirements, must anticipate and prepare for the loss of information processing capabilities. The routine backing up of all data and software is required to recover from losses or outages of the computer system. Data and software essential to the continued operation of Contractor functions must be backed up. The security controls over the backup resources shall be as stringent as the protection required of the primary resources. It is recommended that a copy of the backed up data be stored in a secure, offsite location.

##### **3. CIRTS Data and Maintenance**

The Contractor shall ensure monthly collection and maintenance of client and service information on a monthly basis from the CIRTS or any other system designated by the Council. Maintenance includes ensuring that all data is accurate and current and performing valid exports and backups of all data and systems according to Council standards.

##### **4. Policies and Procedures for Records and Documentation**

The Contractor shall maintain written policies and procedures for computer system backup and recovery and shall have the same requirement of its subcontractors. These policies and procedures shall be made available to the Council upon request.

##### **5. CIRTS Address Validation**

The Contractor shall work with the Council to ensure that client addresses are correct in CIRTS for disaster preparedness efforts. At least annually, and more frequently as needed, the Council will

provide direction on how to validate CIRTS addresses to ensure they can be mapped. The Contractor will receive a list of unmatched addresses that cannot be mapped, and the Contractor will be responsible for correcting the address and send a list to the Council with confirmed addresses. The Council will use this information to update maps, client rosters, and unmatched addresses and disseminate this information.

## **H. Performance Specifications**

### **1. Outcomes and Outputs (Performance Measures)**

At a minimum, the Contractor shall:

- a.** Ensure the provision of the services described in this Contract are in accordance with the DOEA Programs and Services Handbook, the Contractor's current Council-approved SPA, and Section II.A.
- b.** Timely and accurately submit to the Council all documentation and reports described in Attachment I, Section II.E.
- c.** Timely and accurately submit to the Council all documentation and reports described in Attachment I, Section II.G.
- d.** Develop and document strategies in the SPA to support the Council's standard of performance achievement, including increases in the following:
  - i.** Percentage of most frail elders who remain at home or in the community instead of going into a nursing home;
  - ii.** Percentage of APS referrals who need immediate services to prevent further harm who are served within seventy-two (72) hours;
  - iii.** Average monthly savings per consumer for home and community-based care versus nursing home care for comparable client groups;
  - iv.** Percentage of active clients eating two or more meals per day;
  - v.** Percentage of new service recipients whose ADL assessment score has been maintained or improved;
  - vi.** Percentage of new service recipients whose IADL assessment score has been maintained or improved;
  - vii.** Percentage of caregivers who, after service intervention, self-report being very confident about their ability to continue to provide care; and
  - viii.** Percentage of customers who are at imminent risk of nursing home placement who are served with community-based services.

### **2. The Contractor's performance of the measures in H.1., above, will be reviewed and documented in the Council's Annual Monitoring Reports.**

### **3. Monitoring and Evaluation Methodology**

The Council will review and evaluate the performance of the Contractor under the terms of this Contract. Monitoring shall be conducted through direct contact with the Contractor via telephone, in writing, or an on-site visit. The primary, secondary, or signatory of the Contract must be available for any on-site programmatic monitoring visit. The Council reserves the right to conduct an on-site visit unannounced by persons duly authorized by the Council. The Council's determination of acceptable performance shall be conclusive.

The Contractor agrees to cooperate with the Council in monitoring the progress of completion of the service tasks and deliverables. The Council may use, but is not limited to, one or more of the following methods for monitoring:

- a.** Desk reviews and analytical reviews;
- b.** Scheduled, unscheduled, and follow-up on-site visits;

- c. Client visits;
- d. Review of independent auditor's reports;
- e. Review of third-party documents and/or evaluation;
- f. Review of progress reports;
- g. Review of customer satisfaction surveys;
- h. Agreed-upon procedures review by an external auditor or consultant;
- i. Limited-scope reviews; and
- j. Other procedures as deemed necessary by the Council.

4. Desk reviews shall be conducted for each evidence-based program within one week of the completion of the unit. All supporting documentation (i.e., Sign in sheets, program license, trainer certificates, etc.) are required to be submitted to the Council's Program Specialist within one week following the completion of each unit.
5. The Council shall conduct at least one onsite technical assistance visit per year. During this technical assistance visit, the Contractor will arrange for observation of the delivery of service provided to seniors in the local community. The technical assistance visit will consist of training and open discussions necessary to assist with understanding and comply with the Contract.

#### **I. Contractor Responsibilities**

##### **1. Contractor Unique Activities**

All tasks listed above in Section II. are solely and exclusively the responsibility of the Contractor and are tasks for which, by execution of this Contract, the Contractor agrees to be held accountable.

##### **2. Coordination with Other Providers and/or Entities**

Notwithstanding that services for which the Contractor is held accountable involve coordination with other entities in performing the requirements of this Contract, the failure of other providers or entities does not alleviate the Contractor from any accountability for tasks or services that the Contractor is obligated to perform pursuant to this Contract.

#### **J. Council Responsibilities**

##### **1. Council Obligations**

The Council may, within its resources, provide technical support and/or assistance to the Contractor to assist the Contractor in meeting the requirements of this Contract. The Council's support and assistance, or lack thereof, shall not relieve the Contractor from full performance of the Contract requirements.

##### **2. Council Determinations**

The Council reserves the exclusive right to make certain determinations in the tasks performed by the Contractor and the approaches used by the Contractor to perform those tasks. The absence of the Council setting forth a specific reservation of rights does not mean that all other areas of the Contract are subject to mutual agreement.

### **III. METHOD OF PAYMENT**

#### **A. Payment Method Used**

The method of payment for this Contract includes advances and a fixed rate for services. The Contractor shall ensure fixed rates for services include only those costs that are in accordance with all applicable state and federal statutes and regulations and are based on audited historical costs in instances where an independent audit is required. The Contractor shall consolidate all requests for payment from subcontractors and expenditure reports that support requests for payment and shall submit to the Council on forms 106 and 105, Attachment VI.

**B. Unit of Service****1. Fixed Fee/Unit Rate**

Contractor must meet the minimum level of performance stated in the Contract to receive payment. Payments for Fixed Fee/Unit Rates shall not exceed amounts established in Attachment IV, Budget Summary.

**2. Cost Reimbursement**

Payment shall only be authorized for allowable expenditures, per the limits specified in Attachment IV, Budget Summary. All cost reimbursement Requests for Payment must include the actual Receipts and Expenditure Reports, beginning with the first month of the Contract. The Contractor must meet the minimum level of performance stated in the Contract to receive payment.

The Contractor agrees to distribute funds as detailed in the Service Provider Application and the Budget Summary, Attachment IV. The Contractor may request a budget revision by submitting a written request to the Council's Program Specialist. Upon approval, the Council's Finance Director will issue a budget revision letter. Any changes in the amount of federal or general revenue funds identified on the Budget Summary form require a Contract amendment.

**C. Advance Payments**

The Contractor may request up to two (2) months of advances at the start of the Contract period to cover program administration, outreach, and service costs. The payment of an advance will be contingent upon the sufficiency and amount of funds released to the DOEA by the State of Florida (budget release). The Contractor's requests for advance payments require the written approval of the Council's Program Specialist.

1. For the first month's advance request, the Contractor shall provide the Council's Program Specialist documentation justifying the need for an advance and describing how the funds will be distributed. If the Contractor is requesting two (2) months of advances, documentation must be provided reflecting the cash needs of the Contractor within the initial two (2) months and should be supported through a cash-flow analysis or other information appropriate to demonstrate the Contractor's financial need for the second month of advances. If sufficient budget is available, and the Council's Program Specialist, in his or her sole discretion, has determined that there is a justified need for an advance, the Council will issue approved advance payments after January 1st of the Contract year.
2. All advance payments retained by the Contractor must be fully expended no later than March 31, 2025. Any portion of advanced payments not expended must be recouped on the Request for Payment, report number 5, due to the Council on April 7, 2025, in accordance with the Invoice Schedule, Attachment III.
3. All advance payments made to the Contractor shall be reimbursed to the Council as follows: one-tenth (1/10) of the advance payment received shall be reported as an advance recoupment on each request for payment, starting with report number one (3), in accordance with the Invoice Schedule of the advance payment received shall be reported as an advance recoupment on each Request for Payment, starting with report number 5, in accordance with the Invoice Schedule, Attachment III.
4. Contractor may temporarily place advanced funds in an FDIC insured interest-bearing account. All interest earned on advanced funds must be returned to the Council within twenty (20) days of the end of each quarter of the Contract period.

**D. Invoice Submittal and Requests for Payment**

All requests for payment and expenditure reports submitted to support requests for payment shall be on forms 105 and 106, Attachment VI. The Contractor will consolidate all requests for payment from subcontractors and expenditure reports that support requests for payment.

1. All payment requests for Title IID, Evidence-Based Disease Prevention and Health Promotion services, shall be based on the submission of the Monthly Programmatic Report to the Council's Program Specialist. If the Payment and Receipts and Expenditure Report does not equal the amount of units reported on the Monthly Programmatic Report, the Request for Payment will be placed on HOLD until the reports are corrected or proper justification is provided. The Monthly Programmatic Report needs to be submitted electronically to the Council's Program Specialist or designee, prior to the Request for Payment but not later than the Request for Payment arrival.
2. The Contractor shall include with its request for payment documentation of services provided, the units of services provided, and the rates for the services provided in conformance with the requirements as described in this Attachment I and Attachment IV, Budget Summary. Each deliverable must be received and accepted by the Council before payment is made.
3. The Contractor shall maintain documentation to support payment requests that shall be available to the Council or authorized individuals upon request. Such documentation shall be provided upon request to the Council or the DOEA.
4. Any payment due by the Council under the terms of this Contract may be withheld pending the receipt and approval by the Council of all financial and programmatic reports due from the Contractor and any adjustments thereto, including any disallowance not resolved as outlined in Paragraph 26 of the Master Contract.

**E. Documentation for Payment**

The Contractor shall maintain documentation to support payment requests that shall be available to the Council or authorized individuals.

1. The Contractor will enter all required data per the CIRTS Policy Guidelines for clients and services in the CIRTS database. The data must be entered into the CIRTS before the Contractor can submit their request for payment and expenditure reports to the Council. The Contractor shall establish time frames to assure compliance with due dates for the requests for payment and expenditure reports to the Council.
2. The Contractor will run monthly CIRTS reports and verify client and service data in the CIRTS is accurate. This report must be submitted to the Council with the monthly request for payment and expenditure report and must be reviewed by the Council before the Contractor's request for payment and expenditure reports can be approved by the Council. All payment requests shall be based on the submission of actual monthly expenditure reports beginning with the first month of the Contract. The schedule for submission of advance requests (when available) and invoices is Attachment III, Invoice Report Schedule, to this Contract. Payment may be authorized only for allowable expenditures, which are in accordance with the limits specified in Attachment IV, Budget Summary.
3. Any payment due by the Council under the terms of this Contract may be withheld pending the receipt and approval of all financial and programmatic reports due from the Contractor and any adjustments thereto, including any disallowance not resolved as outlined in Section 26 of the Master Contract.
4. Contractor shall ensure compliance with evidence-based programs. Should the Contractor not comply with the research design of the program, reimbursement for services will be at the sole discretion of the Council.

**F. Date for Final Request for Budget Revisions**

Final requests for budget revision or adjustments to Contract funds based on expenditures for services provided through December 31, 2025, must be submitted to the Council's Program Specialist and Finance Director, no later than December 31, 2025.

**G. Date for Final Request for Payment**

The final request for payment will be due to the Council no later than January 19, 2026.

**H. Contractor's Financial Obligations****1. Matching, Level of Effort, and Earmarking Requirements**

The Contractor's match will be made in the form of local cash and/or in-kind resources. Recipients of Older Americans Act services are required to provide at least 10% percent of the funding needed to deliver the services. The match required in this Contract between the Council and the Contractor may include funds raised by the Council to help defray the Contractor's obligation to produce this match. Such match assistance, if any, are separately identified in Section 4 of this Contract, Contract Amount. The match must be reported by title each month. At the end of the Contract period, all OAA funds must be properly matched. Match for Title IID, Evidence-Based Disease Prevention and Health Promotion services is not required, but optional at the discretion of the Council.

**2. Consumer Contributions**

Consumer contributions are to be used under the following terms:

- a. The Contractor assures compliance with Section 315 of the OAA, as amended in 2016, regarding consumer contributions;
- b. Voluntary contributions are not to be used for cost sharing or matching;
- c. Voluntary contributions are to be used only to expand services; and
- d. Accumulated voluntary contributions are to be used prior to requesting federal reimbursement.

**3. Use of Service Dollars and Management of the Assessed Priority Consumer List**

The Contractor is expected to spend all federal, state, and other funds provided by the Council for the purpose specified in the Contract. The Contractor must manage the service dollars in such a manner so as to avoid having a wait list and a surplus of funds at the end of the Contract period, for each program managed by the Contractor. If the Council determines that the Contractor is not spending service funds accordingly, the Council may transfer funds to other Agencies during the Contract period and/or adjust subsequent funding allocations accordingly, as allowable under state and federal law.

**4. Title III Funds**

The Contractor assures compliance with Section 306 of the OAA, as amended in 2016, and will not use funds received under Title III to pay any part of a cost (including an administrative cost) incurred by the Contractor to maintain a contractual or commercial relationship that is not carried out to implement Title III.

**I. Remedies for Nonconforming Services**

1. The Contractor shall ensure that all goods and/or services provided under this Contract are delivered timely, completely, and commensurate with required standards of quality. Such goods and/or services will only be delivered to eligible program participants.
2. If the Contractor fails to meet the prescribed quality standards for services, such services will not be reimbursed under this Contract. In addition, any nonconforming goods (including home delivered meals) and/or services not meeting such standards will not be reimbursed under this Contract. The Contractor's signature on the request for payment form certifies maintenance of supporting

documentation and acknowledgment that the Contractor shall solely bear the costs associated with preparing or providing nonconforming goods and/or services. The Council requires immediate notice of any significant and/or systemic infractions that compromise the quality, security or continuity of services to clients.

#### **J. Corrective Action Plan**

1. Contractor shall ensure 100% of the deliverables identified in Section II.D. are performed pursuant to Contract requirements.
2. If at any time the Contractor is notified by the Council's Program Specialist that it has failed to correctly, completely, adequately perform contractual deliverables identified in this Contract, the Contractor will have ten (10) days to submit a CAP to the Council's Program Specialist that addresses the deficiencies and states how the deficiencies will be remedied within a time period approved by the Council's Program Specialist. The Council shall assess a financial consequence for noncompliance on the Contractor as referenced in Attachment I, Section III.K. of this Contract for each deficiency identified in the CAP, which is not corrected pursuant to the CAP. The Council will also assess a Financial Consequence for failure to timely submit a CAP.
3. If the Contractor fails to correct an identified deficiency within the approved time period specified in the CAP, the Council shall deduct the percentage established in Attachment I, Section III.K. of this Contract from the payment for the invoice of the following month.
4. If the Contractor fails to timely submit a CAP the Council shall deduct the percentage established in Attachment I, Section III.K. of this Contract for each day the CAP is overdue. The deduction will be made from the payment for the invoice of the following month.
5. If, or to the extent, there is any conflict between Attachment I, Section III.K., and Section 39. of the Master Contract, Section III.K. shall have precedence

#### **K. Financial Consequences**

1. The Council will withhold or reduce payment if the Contractor fails to perform the deliverables to the satisfaction of the Council according to the requirements referenced in Attachment I, Section 2.1 of this Contract. The following financial consequences will be imposed if the deliverables stated do not meet in part or in whole the performance criteria as outlined in Attachment I, Section II. of this Contract.
2. Failure to comply with established assessment and prioritization criteria, as evidenced by the CIRTS reports, will result in a 2% reduction of payment per business day. The reduction of payment will begin on the first business day following the Council's notification to the Contractor that the identified deficiency was not cured or satisfactorily addressed in accordance with the Council-approved CAP, referenced in Attachment I, Section III.K.
3. Failure to perform management and oversight of Program operations will result in a 2% reduction of payment per business day. The reduction of payment will begin the first business day following the Council's notification to the Contractor that the identified deficiency was not cured or satisfactorily addressed in accordance with the Council-approved CAP, referenced in Attachment I, Section III.K.
4. Failure to timely submit a CAP within 10 business days after notification of a deficiency by the Council Program Specialist will result in a 2% reduction of payment per business day the CAP is not received. The reduction of payment will begin the first business day following the Council's notification to the Contractor that the identified deficiency was not cured or satisfactorily addressed

in accordance with the Council approved CAP, referenced in Attachment I, Section III.K.

5. Failure to provide services in accordance with the current DOEA Programs and Services Handbook, the service tasks described in Attachment I, Section II of this Contract, and submission of required documentation will result in a 2% reduction of payment per business day. The reduction of payment will begin on the 11th business day following the Council's notification that it has failed to correctly, completely, adequately perform contractual deliverables identified in this Contract.

**END OF ATTACHMENT I**

**ATTACHMENT II****FUNDING SUMMARY**

**Note:** Title 2 CFR & 2 CFR Part 200, as revised, and Section 215.971, F.S. require that the information about Federal Programs and State Projects included in Attachment I of the Master Contract be provided to the recipient. Information contained herein is a prediction of funding sources and related amounts based on the Contract budget.

**1. FEDERAL RESOURCES AWARDED TO THE SUBRECIPIENT PURSUANT TO THIS AGREEMENT CONSISTS OF THE FOLLOWING:**

| Program Title                                  | Year | Funding Source                          | CFDA#  | Fund Amounts        |
|--|------|---|--------|---------------------|
| Title IIIB Support Services                    | 2025 | U.S. Dept. of Health and Human Services | 93.044 | \$329,464.00        |
| Title IIIB Council Match                       | 2025 |   | N/A    | \$43,867.00         |
| Title IIIE Support Services                    | 2025 | U.S. Dept. of Health and Human Services | 93.052 | \$88,728.00         |
| <b>TOTAL FUNDS CONTAINED IN THIS CONTRACT:</b> |      |   |        | <b>\$462,059.00</b> |

**COMPLIANCE REQUIREMENTS APPLICABLE TO THE FEDERAL RESOURCES AWARDED PURSUANT TO THIS AGREEMENT ARE AS FOLLOWS:**

**FEDERAL FUNDS:**

2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. OMB Circular A-133, as amended – Audits of States, Local Governments, and Non-Profit Organizations.

**2. STATE RESOURCES AWARDED TO THE RECIPIENT PURSUANT TO THIS AGREEMENT CONSIST OF THE FOLLOWING:**

| PROGRAM TITLE            | FUNDING SOURCE | CFDA | AMOUNT |
|--------------------------|----------------|------|--------|
| <b>TOTAL STATE AWARD</b> |                |      |        |

**MATCHING RESOURCES FOR FEDERAL PROGRAMS**

**STATE FINANCIAL ASSISTANCE SUBJECT TO Sec. 215.97, F.S.**

| PROGRAM TITLE      | FUNDING SOURCE | CSFA | AMOUNT    |
|--------------------|----------------|------|-----------|
| <b>TOTAL AWARD</b> |                |      | <b>\$</b> |

**COMPLIANCE REQUIREMENTS APPLICABLE TO STATE RESOURCES AWARDED PURSUANT TO THIS AGREEMENT ARE AS FOLLOWS:**

**STATE FINANCIAL ASSISTANCE**

Section 215.97, F.S., Chapter 69I-5, FL Admin Code, Reference Guide for State Expenditures, Other fiscal requirements set forth in program laws, rules and regulations.

**ATTACHMENT III**

**OLDER AMERICANS ACT PROGRAM**  
**INVOICE REPORT SCHEDULE**

| Report # | Based On                              | Due Date           |
|----------|---------------------------------------|--------------------|
| A1       | January Advance*                      | January 08, 2025   |
| A2       | February Advance*                     | January 08, 2025   |
| 1        | January Expenditure Report            | February 07, 2025  |
| 2        | February Expenditure Report           | March 07, 2025     |
| 3        | March Expenditure Report              | April 07, 2025     |
| 4        | April Expenditure Report              | May 07, 2025       |
| 5        | May Expenditure Report                | June 06, 2025      |
| 6        | June Expenditure Report               | July 08, 2025      |
| 7        | July Expenditure Report               | August 07, 2025    |
| 8        | August Expenditure Report             | September 05, 2025 |
| 9        | September Expenditure Report          | October 07, 2025   |
| 10       | October Expenditure Report            | November 07, 2025  |
| 11       | November Expenditure Report           | December 05, 2025  |
| 12       | December Expenditure Report           | January 08, 2026   |
| 13       | Final Expenditure and Closeout Report | January 19, 2026   |

Legend: \* Advance based on projected cash need.

Note # 1: Report #1 and #2 for Advances cannot be submitted to the Department of Financial Services (DFS) prior to January 4 or until this Contract with the Council has been executed and a copy sent to DFS. Actual submission of the vouchers to DFS is dependent on the accuracy of the expenditure report.

Note # 2: Report numbers 1 through 10 will reflect an adjustment of one-tenth (1/10) of the total advance amount, on each of the reports respectively, repaying advances on this Contract. The adjustment will be recorded in Part C, 1 of the report.

Note # 3: Submission of expenditure reports may or may not generate a payment request. If the final expenditure report reflects funds due back to the Council, payment is to accompany the report.

Note # 4: Reports submitted after the 10th of the month may be processed the following month.

**ATTACHMENT IV****OLDER AMERICANS ACT****BUDGET SUMMARY – III B**

| <b>FIXED SERVICES</b>              | <b>Total Units</b> | <b>Unit Rate</b> | <b>Federal Funds</b> | <b>Council Match Funds</b> | <b>Provider Match Funds</b> | <b>Total Reimbursement</b> |
|------------------------------------|--------------------|------------------|----------------------|----------------------------|-----------------------------|----------------------------|
| Adult Day Care Days                | 3,636              | \$71.51          | \$177,656.00         | \$24,774.00                | \$57,570.00                 | \$260,000.00               |
| Education/Training                 | 57                 | \$42.11          | \$0.00               | \$0.00                     | \$2,400.00                  | \$2,400.00                 |
| Counseling (Gero) - Ind            | 240                | \$11.77          | \$440.00             | \$0.00                     | \$2,385.00                  | \$2,825.00                 |
| Counseling (Gero) - Grp            | 60                 | \$26.90          | \$1,614.00           | \$0.00                     | \$0.00                      | \$1,614.00                 |
| Homemaker                          | 2,728              | \$22.67          | \$55,046.00          | \$6,784.00                 | \$0.00                      | \$61,830.00                |
| Personal Care                      | 3,182              | \$22.67          | \$66,947.00          | \$5,188.00                 | \$0.00                      | \$72,135.00                |
| Recreation                         | 3,872              | \$5.46           | \$1,067.00           | \$0.00                     | \$20,075.00                 | \$21,142.00                |
| Respite - In Home                  | 1,456              | \$22.67          | \$26,489.00          | \$6,504.00                 | \$0.00                      | \$32,993.00                |
| Screening & Assessment             | 104                | \$17.47          | \$205.00             | \$617.00                   | \$998.00                    | \$1,820.00                 |
| <b>TOTAL III B CONTRACT AMOUNT</b> |                    |                  | <b>\$329,464.00</b>  | <b>\$43,867.00</b>         | <b>\$83,428.00</b>          | <b>\$456,759.00</b>        |

**BUDGET SUMMARY – III E**

| <b>FIXED SERVICES</b>              | <b>Total Units</b> | <b>Unit Rate</b> | <b>Federal Funds</b> | <b>Council Match Funds</b> | <b>Provider Match Funds</b> | <b>Total Reimbursement</b> |
|------------------------------------|--------------------|------------------|----------------------|----------------------------|-----------------------------|----------------------------|
| Adult Day Care Days                | 1,372              | \$71.51          | \$86,208.00          | \$0.00                     | \$11,857.00                 | \$98,065.00                |
| Caregiver Training & Support - Grp | 80                 | \$31.50          | \$2,520.00           | \$0.00                     | \$0.00                      | \$2,520.00                 |
| <b>TOTAL III E CONTRACT AMOUNT</b> |                    |                  | <b>\$88,728.00</b>   | <b>\$0.00</b>              | <b>\$11,857.00</b>          | <b>\$100,585.00</b>        |
| <b>TOTAL CONTRACT AMOUNT</b>       |                    |                  | <b>\$418,192.00</b>  | <b>\$43,867.00</b>         | <b>\$95,285.00</b>          | <b>\$557,344.00</b>        |

## ATTACHMENT V

## STATE OF FLORIDA DEPARTMENT OF ELDER AFFAIRS

## CIVIL RIGHTS COMPLIANCE CHECKLIST

|   |  |                                    |                    |
|---|--|------------------------------------|--------------------|
| City of Pembroke Pines, Florida / Southwest Focal Point Senior Center |  | County Broward                     | AAA/Contractor     |
| Address 301 NW 103 Ave, P.P. FL 33026                                 |  | Completed By <i>Silvia Aquilay</i> |                    |
| Address   |  | Date 11/25/2024                    | Phone 924-450-6888 |

## PART I. READ THE ATTACHED INSTRUCTIONS FOR ILLUSTRATIVE INFORMATION, WHICH WILL HELP YOU IN THE COMPLETION OF THIS FORM.

1. Briefly describe the geographic area served by the program/facility and the type of service provided:

*PP, Miramar, CC, Plantation, Hialeah, social and recreational activities and transportation.*

2. POPULATION OF AREA SERVED. Source of data: *11/25/2024*

| Total #         | % White   | % Black   | % Hispanic | % Other | % Female  |  |  |
|-----------------|-----------|-----------|------------|---------|-----------|--|--|
| <i>1944,375</i> | <i>40</i> | <i>28</i> | <i>32</i>  |         | <i>51</i> |  |  |

3. STAFF CURRENTLY EMPLOYED. Effective date:

| Total #   | % White   | % Black   | % Hispanic | % Other | % Female  | % Disabled |  |
|-----------|-----------|-----------|------------|---------|-----------|------------|--|
| <i>23</i> | <i>26</i> | <i>13</i> | <i>61</i>  |         | <i>83</i> |            |  |

4. CLIENTS CURRENTLY ENROLLED OR REGISTERED. Effective date:

| Total #     | % White   | % Black   | % Hispanic | % Other   | % Female  | % Disabled | % Over 40  |
|-------------|-----------|-----------|------------|-----------|-----------|------------|------------|
| <i>2273</i> | <i>16</i> | <i>15</i> | <i>94</i>  | <i>25</i> | <i>83</i> |            | <i>100</i> |

5. ADVISORY OR GOVERNING BOARD, IF APPLICABLE.

| Total # | % White | % Black | % Hispanic | % Other | % Female | % Disabled |  |
|---------|---------|---------|------------|---------|----------|------------|--|
|         |         |         |            |         |          |            |  |

## PART II. USE A SEPARATE SHEET OF PAPER FOR ANY EXPLANATIONS REQUIRING MORE SPACE.

6. Is an Assurance of Compliance on file with the Council? If NA or NO, explain.

NA YES NO

7. Compare the staff composition to the population. Is the staff representative of the population?

If NA or NO, explain.

NA YES NO

8. Compare the client composition to the population. Are race and sex characteristics representative of the

Population? If NA or NO, explain.

NA YES NO

9. Are eligibility requirements for services applied to clients and applicants without regard to race,

color, national origin, sex, age, religion, or disability? If NA or NO, explain.

NA YES NO

10. Are all benefits, services, and facilities available to applicants and participants in an equally effective

manner regardless of race, sex, color, age, national origin, religion, or disability? If NA or NO, explain.

NA YES NO

11. For in-patient services, are room assignments made without regard to race, color, national

origin, or disability? If NA or NO, explain.

NA YES NO

12. Is the program/facility accessible to non-English speaking clients? If NA or NO, explain. NA YES NO

13. Are employees, applicants, and participants informed of their protection against discrimination? NA YES NO  
    
If yes, how? Verbal  Written  Poster  If NA or NO, explain.

14. Give the number and current status of any discrimination complaints regarding services or employment filed against the program/facility. NA NUMBER

15. Is the program/facility physically accessible to mobility, hearing, and sight-impaired individuals? NA YES NO  
    
If NA or NO, explain.

**PART III. THE FOLLOWING QUESTIONS APPLY TO PROGRAMS AND FACILITIES WITH 15 OR MORE EMPLOYEES**

16. Has a self-evaluation been conducted to identify any barriers to serving disabled individuals, and to make any necessary modifications? If NO, explain. YES NO

17. Is there an established grievance procedure that incorporates due process in the resolution of complaints? If NO, explain. YES NO

18. Has a person been designated to coordinate Section 504 compliance activities? If NO, explain. YES NO

19. Do recruitment and notification materials advise applicants, employees, and participants of nondiscrimination on the basis of disability? If NO, explain. YES NO

20. Are auxiliary aids available to assure the accessibility of services to hearing and sight impaired individuals? If NO, explain. YES NO

**PART IV. FOR PROGRAMS OR FACILITIES WITH 50 OR MORE EMPLOYEES AND FEDERAL CONTRACTS OF \$50,000.00 OR MORE.**

21. Do you have a written affirmative action plan? If NO, explain. YES NO

| <b>DOEA USE</b>          |  |
|--------------------------|--|
| Reviewed By              | In Compliance: YES      NO*                |
| Program Office           | *Notice of Corrective Action Sent <u>/</u> |
| Date                     | Response Due <u>/</u> <u>/</u>             |
| On-Site      Desk Review | Response Received <u>/</u> <u>/</u>        |

Revised August 2010 Page 2 of 2

**INSTRUCTIONS FOR THE CIVIL RIGHTS COMPLIANCE CHECKLIST**

1. Describe the geographic service area such as a district, county, city, or other locality. If the program/facility serves a specific target population such as adolescents, describe the target population. Also, define the type of service provided.
2. Enter the percent of the population served by race, sex, disability, and over the age of 40. The population served includes persons in the geographical area for which services are provided such as a city, county or other regional area. Population statistics can be obtained from local chambers of commerce, libraries, or any publication from the 1980 Census containing Florida population statistics. Include the source of your population statistics. ("Other" races include Asian/Pacific Islanders and American Indian/Alaskan Natives.)
3. Enter the total number of full-time staff and their percent by race, sex, disability, and over the age of 40. Include the effective date of your summary.
4. Enter the total number of clients who are enrolled, registered or currently served by the program or facility, and list their percent by race, sex, disability, and over the age of 40. Include the date that enrollment was counted.
  - a. Where there is a significant variation between the race, sex, or ethnic composition of the clients and their availability in the population, the program/facility has the responsibility to determine the reasons for such variation and take whatever action may be necessary to correct any discrimination. Some legitimate disparities may exist when programs are sanctioned to serve target populations such as elderly or disabled persons.
5. Enter the total number of advisory board members and their percent by race, sex, disability, and over the age of 40. If there is no advisory or governing board, leave this section blank.
6. Each recipient of federal financial assistance must have on file an assurance that the program will be conducted in compliance with all nondiscriminatory provisions as required in 45 CFR Part 80. This is usually a standard part of the Contract language for DOEA Recipients and their Sub-grantees. 45 CFR § 80.4(a).
7. Is the race, sex, and national origin of the staff reflective of the general population? For example, if 10% of the population is Hispanic, is there a comparable percentage of Hispanic staff?
8. Do eligibility requirements unlawfully exclude persons in protected groups from the provision of services or employment? Evidence of such may be indicated in staff and client representation (Questions 3 and 4) and also through on-site record analysis of persons who applied but were denied services or employment. 45 CFR § 80.3(a) and 45 CFR § 80.1.
9. Participants or clients must be provided services such as medical, nursing, and dental care, laboratory services, physical and recreational therapies, counseling, and social services without regard to race, sex, color, national origin, religion, age, or disability. Courtesy titles, appointment scheduling, and accuracy of record keeping must be applied uniformly and without regard to race, sex, color, national origin, religion, age, or disability. Entrances, waiting rooms, reception areas, restrooms, and other facilities must also be equally available to all clients. 45 CFR § 80.3(b).
10. For in-patient services, residents must be assigned to rooms, wards, etc., without regard to race, color, national origin, or disability. Also, residents must not be asked whether they are willing to share accommodations with persons of a different race, color, national origin, or disability. 45 CFR § 80.3(a).
11. The program/facility and all services must be accessible to participants and applicants, including those persons who may not speak English. In geographic areas where a significant population of non-English speaking people live, program accessibility may include the employment of bilingual staff. In other areas, it is sufficient to have a policy or plan for service, such as a current list of names and telephone numbers of bilingual individuals who will assist in the provision of services. 45 CFR § 80.3(a).
12. Programs/facilities must make information regarding the nondiscriminatory provisions of Title VI available to their participants, beneficiaries, or any other interested parties. 45 CFR § 80.6(d). This should include information on their right to file a complaint of discrimination with either the Department or the U.S. Department of Health and Human Services. The information may be supplied verbally or in writing to every individual or may be supplied through the use of an equal opportunity policy poster displayed in a public area of the facility.

13. Report number of discrimination complaints filed against the program/facility. Indicate the basis (e.g. race, color, creed, sex, age, national origin, disability, and/or retaliation) and the issues involved (e.g. services or employment, placement, termination, etc.). Indicate the civil rights law or policy alleged to have been violated along with the name and address of the local, state, or federal agency with whom the complaint has been filed. Indicate the current status of the complaint (e.g. settled, no reasonable cause found, failure to conciliate, failure to cooperate, under review, etc.).
14. The program/facility must be physically accessible to mobility, hearing, and sight-impaired individuals. Physical accessibility includes designated parking areas, curb cuts or level approaches, ramps, and adequate widths to entrances. The lobby, public telephone, restroom facilities, water fountains, and information and admissions offices should be accessible. Door widths and traffic areas of administrative offices, cafeterias, restrooms, recreation areas, counters, and serving lines should be observed for accessibility. Elevators should be observed for door width and Braille or raised numbers. Switches and controls for light, heat, ventilation, fire alarms, and other essentials should be installed at an appropriate height for mobility impaired individuals.
15. Section 504 of the Rehabilitation Act of 1973 requires that a recipient of federal financial assistance conduct a self-evaluation to identify any accessibility barriers. Self-evaluation is a four-step process:
  - a. Evaluate, with the assistance of disabled individual(s)/organization(s), current policies and practices that do not or may not comply with Section 504;
  - b. Modify policies and practices that do not meet Section 504 requirements;
  - c. Take remedial steps to eliminate the effects of any discrimination that resulted from adherence to these policies and practices; and
  - d. Maintain self-evaluation on file, including a list of the interested persons consulted, a description of areas examined, and any problems identified, and a description of any modifications made and of any remedial steps taken 45 CFR § 84.6. (This checklist may be used to satisfy this requirement if these four steps have been followed).
16. Programs or facilities that employ 15 or more persons shall adopt grievance procedures that incorporate appropriate due process standards and that provide for the prompt and equitable resolution of complaints alleging any action prohibited by Part 84 of Title 45, CFR 45 CFR § 84.7(b).
17. Programs or facilities that employ 15 or more persons shall designate at least one person to coordinate its efforts to comply with Part 84 of Title 45, CFR. 45 CFR § 84.7(a).
18. Programs or facilities that employ 15 or more persons shall take appropriate initial and continuing steps to notify participants, beneficiaries, applicants, and employees that the program/facility does not discriminate on the basis of handicap in violation of Section 504 and Part 84 of Title 45, CFR. Methods of initial and continuing notification may include the posting of notices, publication in newspapers and magazines, placement of notices in publications of the programs or facilities, and distribution of memoranda or other written communications. 45 CFR § 84.8(a).
19. Programs or facilities that employ 15 or more persons shall provide appropriate auxiliary aids to persons with impaired sensory, manual, or speaking skills where necessary to afford such persons an equal opportunity to benefit from the service in question. Auxiliary aids may include, but are not limited to, brailed and taped materials, interpreters, and other aids for persons with impaired hearing or vision. 45 CFR § 84.52(d).
20. Programs or facilities with 50 or more employees and \$50,000.00 in federal contracts must develop, implement, and maintain a written affirmative action compliance program in accordance with Executive Order 11246, 41 CFR Part 60 and Title VI of the Civil Rights Act of 1964, as amended.

January 1, 2025 - December 31, 2025

Contract JA125-10-2025

## ATTACHMENT VI

CONTRACT #:  
PROV YYYY

RECEIPTS AND UNIT COST REPORT  
Program

January 1, 2025 - December 31, 2025

Contract JA125-10-2025

PROVYYYY

## CASH ADVANCE AND CONTRACT PAYMENT REQUEST FORM

## PROGRAM

## FUNDING SOURCE

|  |  |   |          |  |          |
|--|--|---|----------|--|----------|
| PROVIDER NAME ADDRESS PHONE & FEID #<br>PROV<br>ADDRESS<br>ADDRESS<br>Tel: Fax:<br>FEID #:             |  | TYPE OF REPORT<br>A. PAYMENT REQUEST:<br>Regular <input checked="" type="checkbox"/> Supplemental |          | THIS REQUEST PERIOD:<br>Period<br>CONTRACT PERIOD:<br>CONTRACT #:<br>REPORT #1<br>PSA # 10 |          |
| CERTIFICATION: I hereby certify that this request or refund conforms with the terms of this Contract.  |  |   |          |  |          |
| Prepared By: _____ Date: _____   |  | Approved By: _____ Date: 20   |          |  |          |
| PART A: CONTRACT FUNDS SUMMARY   |  | SERVICE   | SERVICE  | SERVICE  | SERVICE  |
| 1. Approved Contract Amount  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| 2. Previous Funds Requested for Contract Period  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| 3. Contract Funds Available  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| PART B: CONTRACT FUNDS REQUESTED:  |  |   |          |  |          |
| 1. Cash Advances (1st-2nd Months)  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| 2. Amount Earned This Period (10% PSA # 10 Form 102Z Part B Column E)                                  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| 3. Total   |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| PART C: NET FUNDS REQUESTED:   |  | SVC CODE  | SVC CODE | SVC CODE   | SVC CODE |
| 1. Less Overadvance  |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| 2. Contract Funds Are Hereby Requested (Part B Line 3 minus Part C line 1) Not to exceed Part A Line 3 |  | \$0.00  | \$0.00   | \$0.00   | \$0.00   |
| ADVANCE EARNED<br>Advance Remaining  |  |   |          |  |          |

PSA #10 FORM 105 Dated 3-3-97

BATCH #: \_\_\_\_\_

DESC: PROVPROG MM/YYYY

VENDOR ID: P-PROV

ACCOUNT #: 202010 JXXXXXX XXXX XXX

CHECK # \_\_\_\_\_ CHECK DATE: \_\_\_\_\_

INPUT: \_\_\_\_\_ APPROVAL: \_\_\_\_\_

**ATTACHMENT VII**

[Enter agency Logos]  
[Enter Name of Organization]  
Health & Wellness Program (OA3D)  
[Enter PSA Number]  
Sign-in-Sheet

Date: \_\_\_\_\_ Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Location Name (ie. Senior Center): \_\_\_\_\_

Address (include City, State, Zip Code): \_\_\_\_\_

Phone #: \_\_\_\_\_ Funded by: \_\_\_\_\_

Topic: \_\_\_\_\_ # of Seniors: \_\_\_\_\_

Name & Title of Presenter:

| #  | Printed Name | Signature |
|----|--------------|-----------|
| 1  |              |           |
| 2  |              |           |
| 3  |              |           |
| 4  |              |           |
| 5  |              |           |
| 6  |              |           |
| 7  |              |           |
| 8  |              |           |
| 9  |              |           |
| 10 |              |           |

[Name of organization]

[Enter address]

[enter city, state, zip code]

[enter phone number and fax number]

[enter web address]

## ATTACHMENT VIII

DEPARTMENT OF ELDER AFFAIRS

## BACKGROUND SCREENING

## ATTESTATION OF COMPLIANCE - EMPLOYER

**AUTHORITY: ALL EMPLOYERS** are required to annually submit this form attesting to compliance with the provisions of chapter 435 and section 430.0402 of the Florida Statutes.

The term "employer" means any person or entity required by law to conduct background screenings, including but not limited to, Area Agencies on Aging/Aging and Disability Resource Centers, Lead Agencies, and Service Providers that contract directly or indirectly with the Department of Elder Affairs (DOEA), and any other person or entity which hires employees or has volunteers in service who meet the definition of a direct service provider. See §§ 435.02, 430.0402, Fla. Stat.

A direct service provider is "a person 18 years of age or older who, pursuant to a program to provide services to the elderly, has direct, face-to-face contact with a client while providing services to the client and has access to the client's living areas, funds, personal property, or personal identification information as defined in s. 817.568. The term also includes, but is not limited to, the administrator or a similarly titled person who is responsible for the day-to-day operations of the provider, the financial officer or similarly titled person who is responsible for the financial operations of the provider, coordinators, managers, and supervisors of residential facilities, and volunteers, and any other person seeking employment with a provider who is expected to, or whose responsibilities may require him or her to, provide personal care or services directly to clients or have access to client funds, financial matters, legal matters, personal property, or living areas." § 430.0402(1)(b), Fla. Stat. (2023).

ATTESTATION

As the duly authorized representative of:

City of Pembroke Pines, SWFP  
(Name of Employer)

Located at 301 NW 103 Ave Pembroke Pines, FL 33026

Street address

City

State

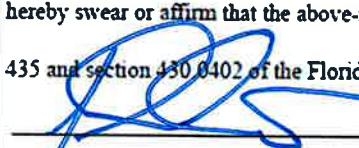
Zip Code

Under penalty of perjury, I,

Tony Sheehan

(Name of Representative)

hereby swear or affirm that the above-named employer is in compliance with the provisions of chapter 435 and section 430.0402 of the Florida Statutes, regarding level 2 background screening.

  
Signature of Representative

11/25/2024  
Date

DOEA Form 235, Attestation of Compliance - Employer, Effective October 2023, F.S.  
Form available at <https://elderaffairs.org/about-us/background-screening/background-screening-clearinghouse/training-accessing-the-clearinghouse/>