

**Chatham County Aging Services Department
Requests for Proposal (RFP)
In-Home Aide and Caregiver Respite**

I. Proposal Instructions

A. Proposal Deadline: Proposals must be received by Chatham County no later than **6/5/26 by 5:00pm.**

B. Submission of Proposals: Vendors must submit both **an electronic PDF** version of the proposal and **one hard copy** with all attachments, including signatory pages, which should be received by the deadline above. The hard copies must be sent to one of the following delivery addresses:

- Postal Address: Michele Peluso, Chatham County Finance Office
P. O. Box 608, Pittsboro, NC 27312
- Street Address: Michele Peluso, County Finance Office, Courthouse Annex
12 East Street, Pittsboro, NC 27312

The **electronic PDF version** of the proposal must be submitted by the deadline above to: purchasing@chathamcountync.gov.

C. Withdrawal of Proposals: Proposing vendors may withdraw their proposal any time before the deadline for submission on **6/04/26 by 5:00 PM.** The withdrawal must be submitted in writing and signed by the proposing vendor.

D. Inquiries and Corrections: All inquiries relating to this request should be in writing and addressed to:

Michele Peluso, Chatham County Finance Office
P.O. Box 608, Pittsboro, NC 27312

All inquiries are to be sent to: purchasing@chathamcountync.gov.

If a proposing vendor finds discrepancies in or omissions from the specifications or should require additional clarification of any part, a written request for interpretation shall be submitted to Michele Peluso. Any interpretation of or changes made to the RFP will be made by written addendum to each proposing consultant and shall become part of the request for any contract awarded. The County will not be responsible for the accuracy of any other oral explanations, interpretations, or representations. **All inquiries must be submitted by 5:00 pm on 5/22/26.** It shall be the responsibility of each proposing organization or individual to verify that every addendum has been received prior to submitting proposals. Addenda will be posted to the County's Bids and RFP Opportunities at www.chathamcountync.gov/bidsandopportunities.

E. Vendor Certification: The submission of a proposal shall be deemed a representation and certification that the proposing vendor:

- Has carefully read and fully understands the information provided by Chatham County in this RFP;
- Is financially solvent and has the capability to successfully undertake and complete the responsibilities and obligations of the proposal submitted;
- Represents that all of the information contained in the submitted proposal is true and correct;
- Did not in any way collude or conspire with any other parties, directly or indirectly, in regard to the amount, terms, or conditions of this proposal;
- Acknowledges that Chatham County has the right to make any inquiry it deems appropriate to substantiate or supplement information provided by proposing vendors and hereby grants Chatham County permission to make these inquiries; and
- Acknowledges that any proposal cannot be modified after its submission for any reason.

F. Format and Deadline of Proposals: Late proposals will not be accepted under any circumstance and will not be opened or reviewed. We will not accept proposals by fax or any method other than is outlined under item B of Proposal Instructions. The sender must allow ample delivery time for the selected shipment or transmission methods.

G. Definition and Context: Unless otherwise specified in this document, all words shall have a common meaning unless the context in which they are used clearly requires a different meaning. Words in the singular number include the plural, and in the plural include the singular.

II. Conditions of Bid Submittal

- A.** All proposing firms shall comply with all conditions, requirements, and specifications contained herein, with any departure constituting sufficient cause for rejection of the bid. However, Chatham County reserves the right to change the conditions, requirements, and specifications as it deems necessary.
- B.** The bid must be signed by a duly authorized official of the proposing company submitting the bid.
- C.** No bid will be accepted from any person, company, or corporation that is in arrears for any obligation to the county, or that otherwise may be deemed irresponsible or unresponsive by county.
- D.** Only one bid will be accepted from any person, company, or corporation.
- E.** All prices quoted must be firm for a period of ninety (90) days following the opening of the bid with the awarded price good for a period of one year.
- F.** Chatham County reserves the right to reject all bids or any part thereof and to award the bid to the most responsive and responsible proposing company as deemed in the best interest of the Aging Services Department.
- G.** All bids shall be prepared in a comprehensive manner as to content, but no necessity exists for expensive binders or promotional material. Promotional material will not be considered as part of the bid and will not affect the evaluation of the bid.

- H. All costs, including travel and expenses, incurred in the preparation of this bid shall be borne solely by the proposing company.
- I. Chatham County reserves the right to request additional references.
- J. Chatham County will not return to proposing firm's bids or other information supplied to the Aging Services Department.
- K. Chatham County reserves the right to extend the awarded service for a period of one year on the same bid specification.
- L. Chatham County seeks a minimum of three responsive bids for bidding evaluation. Should there be less than three (3), the bid may be let a second time. The Aging Services Department reserves the right to award less than three bids.

III. Evaluation of Bids

A selection will be made based on the bids received. The company(ies) selected for a contract award will be chosen on the basis of the benefits to the department and not necessarily based on lowest price. **Chatham County is interested in agencies committed to providing quality and responsive service and a fair, living wage for its in-home aides.**

Chatham County reserves the right to reject any or all proposals or any part thereof and to select the most responsive proposal that is deemed in the best interest of the Chatham County Aging Services Department and its service clients. No proposals will be accepted from any person or organization that is in arrears for any obligation to Chatham County, or that otherwise may be deemed irresponsible or unresponsive by Chatham County or the Aging Services Department.

Chatham County reserves the right to enter into an agreement with another proposing vendor if the originally selected vendor fails to execute a contract with the county or defaults on their contract.

Chatham County reserves the right to negotiate with any, none or all of the proposing vendors.

No agreements with any selected vendor shall be binding until a contract is signed and executed by Chatham County and authorized representatives of the vendor.

IV. Evaluation Criteria

The recommendation will be based on the proposal which best meets the Aging Services Department's needs taking into consideration several criteria, including:

- A. The degree to which the bid meets or exceeds the terms of the specifications as advertised, including insurances, licenses, and assurances.
- B. Results of reference checks and past performance for other clients.

- C. Past performance, including responsiveness to the needs of Aging Services both in the time to deliver and services to be offered.
- D. Perceived ability to provide quality and responsive service, including assuring the availability of qualified aides to serve the Aging Services Department clients in a timely manner.
- E. Projected and demonstrated average time from receiving client referral to providing aide service in the home.
- F. Price. **The County is committed to assuring that the provider is offering its in-home aides a fair, living wage.**
- G. At least three years of business operations in the bidded service.

V. Bid Preparation and Information

- A. Bids submitted shall contain all information as requested herein, and any additional information necessary to summarize the overall benefit of the bid to the Aging Services Department.
- B. Bids shall include the following:
 1. A cover letter shall be provided that states the name, address, and telephone number of the proposing company. The letter must include the signature of the person having the authority to bid for the company and bind the company in a formal contract with Chatham County.
 2. A response that defines the methods and means by which the proposed company will deliver the equipment or service(s) outlined in this bid.
 3. Completed and clear indication of how the company will satisfy the bid specifications with an indication and explanation of any variances (in narrative or tabular format).
 4. A project timeline that outlines the estimated date of delivery or start-up of service.
 5. Total bid price.
 6. An indication of the company's commitment to providing its in-home aide workers with a fair, living wage.
 7. A list of three appropriate references with current contact information (including contact persons, telephone numbers, and email if available) for which similar work has been performed. These references should be from other agencies who have used the bidder's services for at least a year. Ideally this would include at least one reference from an agency whose funding source included the Home and Community Care Block Grant.
 8. The vendor must state that the proposal was made without any connection with any other person, company or parties making a similar proposal and that it is in all respects fair and in good faith without collusion and fraud.
- C. Submission of a bid shall be taken as an indication that the proposer has full knowledge of the scope, nature, quality, and quantity of the work to be performed, and the detailed requirements and conditions under which the service is to be provided. This would include a working knowledge of the State standards and policies and procedures for in-home aide services under the Home and

Community Care Block Grant found at <https://www.ncdhhs.gov/documents/files/homeaide-policies-and-procedures/open> covering such areas as aide competency, training and oversight, assessment and service planning, service priorities, and documentation and quality assurance.

- D. If any part of the work is to be subcontracted, the sub-contractual arrangements shall be the sole responsibility of the company. The company shall provide a description of the subcontracting organization(s) and the contractual arrangements made therewith. All subcontractors must be approved in writing in advance by Chatham.
- E. Monitoring of this service will be done in accordance with requirements and guidelines set forth by the North Carolina Division of Aging and Adult Services.

VII. General Requirements of the Successful Proposing Company

Once the award by Chatham County and the Aging Services Department has been made, the successful company shall enter into a written contract with Chatham County after notice of the award for an effective date of service beginning date TBD.

Purpose of the RFB for In-Home Aide Service

The Contractor(s) will offer Levels II and III in-home aide services and caregiver respite to approximately 80 older adults and family caregivers in Chatham County for the fiscal year beginning July 1, 2023, through June 30, 2024. The aide services include personal care, light housekeeping, and meal preparation. The contract may also cover in-home aide caregiver respite services as approved and arranged by the Aging Services Department.

Scope of Work

The Contractor is expected to assist older adults by performing personal care tasks essential to activities of daily living, with some home management tasks possibly included as incidental to the personal care. Such personal care and home management tasks are performed to enable individuals to remain in their own homes when they are unable to carry out these activities for themselves and when no responsible person is available for these tasks. Additionally, assistance will be provided with these tasks for individuals who have a family caregiver residing with or assisting in the home. The in-home aide service will allow the caregiver to take a much-needed break and tend to other tasks or responsibilities.

The Contractor is obligated to provide these in-home aide services for the Agency in accordance with the requirements of the N.C. Division of Health Service Regulation and the service policies and procedures of the NC Division of Aging and Adult Services found at <https://www.ncdhhs.gov/documents/files/homeaide-policies-and-procedures/open> covering such areas as aide competency, training and oversight, assessment and service planning, service priorities, and documentation and quality assurance.

The Contractors must assure the use of in-home aides who are qualified and appropriately supervised.

- i. Aides must be non-relatives of clients and at least 18 years of age and older.
- ii. Aides must demonstrate competence for the tasks they are assigned to perform. The files maintained by the employing agency should have written documentation of each aide's tasks and should be made available to the Chatham County Aging Services Department in a manner that the department determines appropriate and before the aide provides any client service.
- iii. Aides who perform In-Home Aide Level II personal care tasks (Limited Assistance) must have documentation that they were competency tested by the company to perform the tasks. Level III Personal Care (Extensive Assistance) must be registered as Nurse Aide I, be listed on the Nurse Aide Registry maintained by the NC Division of Health Service Regulation and have documentation that they were competency tested by the company to perform their assigned tasks. The Contractor is responsible for its employees being aware of the NC Expanded Home Care Licensure Rules as it relates to their discipline and function, policies and procedures, and prerequisites for employment.
- iv. The Contractor must maintain documentation for review by the Agency showing that newly hired aides are supervised during service delivery at a minimum of two times during the first thirty (30) days of employment. This documentation should be made available to the Chatham County Aging Services Department in a manner that the department determines appropriate and within forty (40) days of employment.
- v. The Contractor must maintain documentation for review by the department showing in-service training of all aides that are serving Aging Services clients.
- vi. The Contractor must provide the department with a copy of the licensure documentation for the registered nurse(s) and copies of all nurse aide certifications before these workers directly serve Aging Services clients.
- vii. The Contractor must provide the Aging Services Department documentation in a manner that the department determines appropriate for its contractor personnel who engage directly with department clients verifying that a criminal background check was conducted prior to serving clients.

Supervision and evaluation of the in-home aide is the responsibility of the Contractor and must, at a minimum, comply with the requirements for the in-home aide levels being provided. Supervisory home visits must be made at least twice during the first month of the aide's employment for both Levels II and III clients.

Level II- For aides providing Level II personal care tasks, a supervisory visit to each client's place of residence at least every three months, with or without the in-home aide's presence and at least annually, while the in-home aide is providing care to each client is required. In each of the two intervening months, the supervisor should have some type of contact (telephone, office conference, or home visit) with the aide and the client/designated person to ensure service provision is running smoothly. These contacts may be initiated by the aide, client, or supervisor and must be documented by the Contractor.

Level III – a supervisory home visit or telephone call to the aide within the first calendar week of an aide assignment is recommended. The appropriate health professional shall make a

supervisory visit to each client's place of residence at least every three months, with or without the in-home aide's presence, and at least annually, while the in-home aide is providing care to each client to assess the care and services being provided. In each of the two intervening months, the supervisor should have some type of contact (telephone, office conference, or home visit) with the aide and the client/designated person to ensure service provision is running smoothly. These contacts may be initiated by the aide, client, or supervisor.

The Contractor is required to ensure that the in-home aides have received sufficient training in the level of tasks to be performed before they are allowed to work independently. Individual employee records must be maintained and include documentation of competency, training, supervisory visits, and performance evaluations. The Contractor will provide documentation of aide supervision and competency testing to the Aging Services Department annually as part of routine contract monitoring, and otherwise upon request by the department.

The Contractor must establish and maintain a client record to include an assessment of client's needs, the in-home aide service plan, signed copy of Client Bill of Rights, and authorization for services.

The Contractor must comply with all relevant local, state, and federal laws and requirements. **The Contractor must not have any experience during the past three (3) years where it has been suspended or debarred from the receipt of federal or state funding and must have paid its required taxes on a timely basis.**

The Contractor must be prepared to conduct a quarterly reassessment for each Agency-sponsored client completed by an appropriate professional. At a minimum, each assessment/reassessment should address the client's physical health, ADL/IADL functioning, social support status, mental/emotional functioning, economic status and living environment.

The Contractor is to provide an updated plan of care for each client on an annual basis, based on a full reassessment completed by an appropriate professional, after a hospitalization, and whenever a change in plan or services is indicated by the client's condition. The plan of care must include the signature of the client or client representative and registered nurse signature. The detailed care plan must identify client goals, level of care and services to be performed, frequency of service provision, anticipated duration of the service, client safety and restrictions, as appropriate, and conditions for continuing or discontinuing the service.

The Contractor is expected to accept any new clients referred by the Aging Services Department, without regard for race, sex, age, illness, disability, religious beliefs, location, or condition of client's home environment, except in instances where the client's living situation is believed to endanger or pose a significant risk for the Contract employee. In the event there are conflicting opinions regarding endangerment or risk, a mutually agreed upon third party will be retained to render a decision.

The Contractor will consult with the appropriate Aging Services personnel before altering any services to department-sponsored clients or whenever services cannot be provided as outlined in

the plan of care. If the Contractor is not able to provide all services due, consultation with department personnel is necessary to determine priority of clients to be served.

The Contractor will provide monthly to the Aging Services Department an analysis of in-home aide services, including the total hours of services provided, in a manner acceptable to the department. By the 8th day of each calendar month, the Contractor must provide flow sheets with analysis for all services delivered on a weekly basis. Chatham County reserves the right to not reimburse hours if the service is provided by an unqualified worker and/or in a manner that does not comply with the contract requirements.

The Contractor must maintain appropriate client files and employee personnel files at its licensed branch or main office and allow inspection of said files by the Aging Services Department and Chatham County Accounts Payable as necessary to evaluate service compliance.

The Contractor will agree to protect, defend, identify and hold Chatham County, its employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings or causes of action of every kind and character in connection with or arising directly or indirectly out of its work for the Aging Services Department. The Contractor further agrees to investigate, handle, respond to, provide defense for and defend any such claims, etc., at his/her sole expense and agrees to bear all other costs and expenses related thereto, even if such claim is groundless, false or fraudulent.

County Requirements

Insurance Requirement

During the term of the contract, the Contractor at its sole cost and expense shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the contract. As a minimum, the Contractor shall provide and maintain the following coverage and limits:

- a) Worker's Compensation - The contractor shall provide and maintain Worker's Compensation Insurance as required by the laws of North Carolina, as well as employer's liability coverage with minimum limits of \$500,000, covering all of Contractor's employees who are engaged in any work under the contract. If any work is sublet, the Contractor shall require the subcontractor to provide the same coverage for any of his employees engaged in any work under the contract. (Non-applicable-individual.)
- b) Commercial General Liability - General Liability Coverage on a Comprehensive Broad Form on an occurrence basis in the minimum amount of \$100,000 bodily injury per person, \$500,000 bodily injury per occurrence and \$100,000 property damage, and 1,000,000 in errors and omissions and negligent performance. (Defense cost shall be in excess of the limit of liability.)

- c) Automobile - Automobile Liability Insurance, to include liability coverage, covering all owned, hired, and non-owned vehicles used in performance of the contract. The minimum combined single limit shall be \$250,000.00 bodily injury and \$100,000 property damage.

Providing and maintaining adequate insurance coverage is a material obligation of the Contractor and is of the essence of this contract. The Contractor may meet its requirements of maintaining specified coverage and limits by demonstrating to the County that there is in force insurance with equivalent coverage and limits that will offer at least the same protection to the County. All such insurance shall meet all laws of the State of North Carolina. Such insurance coverage shall be obtained from companies that are authorized to provide such coverage and that are authorized by the Commissioner of Insurance to do business in North Carolina. The Contractor shall at all times comply with the terms of such insurance policies, and all requirements of the insurer under any such insurance policies, except as they may conflict with existing North Carolina laws or this contract. The limits of coverage under each insurance policy maintained by the Contractor shall not be interpreted as limiting the contractors.

E-Verify

Effective September 4, 2013, North Carolina local government units are prohibited from entering into certain contracts unless the contractor and the contractor's subcontractors, if any, comply with the requirements of N.C. Gen. Stats. §64-26(a). Prior to providing any services hereunder, Contractor and Contractor's subcontractors, if any, are subject to the provisions of N.C. Gen. Stats. §64-26(a). Contractor agrees to fully comply with such statute and require Contractor's subcontractors, if any, to fully comply with such statute. Iran Divestment Act

Effective October 1, 2015, North Carolina local government units are prohibited from entering into certain contracts unless the contractor and the contractor's subcontractors, if any, comply with the requirements of §143C-6A-5. Contractor agrees to fully comply with such statute and require Contractors subcontractors, if any, to fully comply with such statute.

Additional County Conditions

- All proposing firms or individuals shall comply with all conditions, requirements, and specifications contained herein, with any departure constituting sufficient cause for rejection of the proposals. However, Chatham County reserves the right to change the conditions, requirements, and specifications as it deems necessary.
- The proposal must be signed by a duly authorized official of the proposing organization or individual submitting the proposal.
- No proposal will be accepted from any person or organization that is in arrears for any obligation to Chatham County, or that otherwise may be deemed irresponsible or unresponsive by County staff, the Chatham County Board of Commissioners, or the Chatham County Economic Development Corporation.
- Chatham County is not obligated to enter into any contract as a result of the RFP.
- All prices quoted must be firm for a period of 90 (ninety) days following the bid deadline.
- Chatham County reserves the right to reject any and all proposals or any part thereof and to select the most responsive proposal that is deemed in the best interest of Chatham County.

- Chatham County may approve or disapprove the use of specific proposed subcontractors in any proposal.
- Chatham County reserves the right to enter into an agreement with another proposing vendor in the event that the originally selected vendor fails to execute a contract with the County or defaults on their contract.
- All proposals shall be prepared in a comprehensive manner as to content, but we do not require specific types of binders or promotional material for submissions. Promotional material will not be considered part of the proposal and will not affect the evaluation of proposals.
- Chatham County reserves the right to negotiate with any, none, or all of the proposing vendors.
- All costs, including travel and expenses, incurred in the preparation of this proposal will be borne solely by the proposing company.
- The County will not return proposal materials to those submitting proposals.
- No agreements with any selected vendor shall be binding until a contract is approved, signed, and executed by the authorized County Official and authorized representatives of the vendor.

Chatham County is an Equal Opportunity Employer and does not discriminate on the basis of sex, marital status, race, color, creed, national origin, sexual orientation, gender identity, age or disability.