

REQUEST FOR PROPOSAL (RFP) #202602 DEMENTIA & CAREGIVER SUPPORT SERVICES

Issued by:
Kenosha County Department of Human Services



Service: **DEMENTIA & CAREGIVER SUPPORT SERVICES**

Division: **DADS**
Division of Aging & Disability Services

Proposal Information: **Request for Proposal information may be accessed via VendorNet**
<https://vendornet.wi.gov/>

Proposals must be submitted electronically via email no later than 10:00 AM (CST) June 30th, 2026, to single point of contact:

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Contract Specialist
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Kenosha County Department of Human Services Mission Statement, encompassing the following Divisions:

*Aging & Disability Services
Behavioral Health
Brookside Care Center
Children & Family Services
Medical Examiner*

*Public Health
Veteran Services
Southeastern WI Workforce Development Board
Willowbrook Assisted Living
Workforce Development*

To develop, coordinate, and administer a comprehensive network of services to children, youth, families, the elderly, and individuals striving to cope with developmental disabilities, mental illness, and alcohol and drug problems; to preserve and strengthen families, while protecting children from high-risk or abusive situations; to empower individuals and families to become law-abiding and economically self-sufficient; to assure the delivery of public health services necessary to prevent disease; to protect, promote, and preserve a healthy citizenry and environment; to advise and assist military veterans; to provide high quality nursing home services to the elderly and medically disabled; to advocate on behalf of these constituencies on the local, state, and national level.

TABLE OF CONTENTS

I	INTRODUCTION	1
II	DEFINITIONS	1
III	CALENDAR OF EVENTS	1
IV	GENERAL INFORMATION	2
V	PROGRAM DESCRIPTION & SPECIFICATIONS/SCOPE OF WORK	6
VI	PROPOSAL DESIGN	11
VII	RFP SUBMISSION	15
VIII	EVALUATION & SELECTION	16

ATTACHMENTS

ATTACHMENT #1 – VENDOR/PROVIDER INFORMATION

ATTACHMENT #2 – ASSURANCES

ATTACHMENT #3 – ETHICS COMPLIANCE NOTICE

ATTACHMENT #4 – ETHICS COMPLIANCE ADDENDUM

ATTACHMENT #5 – DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

ATTACHMENT #6 - BUSINESS EXPERIENCE

OTHER ATTACHMENTS

ATTACHMENT EXCEL – BUDGET WORKSHEET

KENOSHA COUNTY DEPARTMENT OF HUMAN SERVICES
Division of Aging & Disability Services
Request for Proposal (RFP) #202602
Dementia & Caregiver Support Services

I INTRODUCTION

This Request for Proposal (RFP) is being issued by the Kenosha County Department of Human Services (KCDHS) to request competitive proposals from organizations that are interested in providing **Dementia & Caregiver Support Services**, as further defined in this RFP.

II DEFINITIONS

County means the County of Kenosha Wisconsin

KCDHS means Kenosha County Department of Human Services

Proposer/Provider/Contractor means a company or individual submitting a response to this RFP

RFP means Request for Proposal

State means the State of Wisconsin

Vendor Portal means the State of Wisconsin's Vendor Portal – VendorNet & eSupplier

III CALENDAR OF EVENTS

This calendar is subject to change at the sole discretion of Kenosha County. All attempts will be made to adhere to this calendar. However, due to circumstances beyond our control, it may be necessary to modify the events and/or dates and times.

06/02/2026	Public Notice of RFP
06/16/2026	Deadline for Questions by 2:00 PM CST
06/19/2026	Q & A Summary Posted to VendorNet (if applicable)
06/30/2026	Deadline for Proposals by 10:00 AM CST
1-4 weeks	Evaluation Process
TBD	Projected Interview Dates
TBD	Service Implementation and Transition Period
01/01/2027	Intended Contract Start Date

IV GENERAL INFORMATION AND REQUIREMENTS

The contract for this project will consist of this Request for Proposals document, the specification documents and any associated exhibits, drawings, or additional documents, the Contractor's proposal response with all required forms, any addenda that may be issued, any negotiated terms and conditions, and a Kenosha County contract.

This contract is for a **one (1) year** term from **01/01/27 to 12/31/27** with option to be renewed for **four (4) additional one (1) year periods** providing both parties agree to the extension under the condition that the price may be renegotiated, and all other terms, conditions, and specifications remain the same.

- Thoroughly examine the entire RFP. Closely review program description, specifications, scope of work, schedule instructions and all other solicitation documents.
- Errors or Omissions - If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should notify immediately the RFP single point of contact of such error and request modification or clarification of the RFP document.
- Questions – All questions must be emailed to the RFP Single Point of Contact.
- **No phone calls, emails, or other correspondence to other County staff regarding this procurement are permitted during the procurement process unless otherwise noted in writing as required as part of the Solicitation process. Violation of these conditions may be considered sufficient cause for automatic rejection of a Proposal. All oral communications are unofficial.**
- Check the website & VendorNet for future announcements, addenda, and other related information prior to submitting the proposal by its due date.
- Proposers shall rely only on written responses issued by addenda. The summary of applicable questions and answers (Q&A Summary) will be posted by an RFP Addenda via VendorNet. RFP Addendums posted via VendorNet. Addenda(s) should be reviewed, signed and returned with your proposal.
- Failure to respond to the requirements of the RFP in its entirety, including any addenda, supplemental information or revisions may result in disqualification.
- KCDHS does not reimburse costs incurred in proposal preparation.
- Kenosha County may waive or permit cure of minor irregularities, or may reject any or all proposals received, re-issue any or all parts of the RFP, adjust, cancel, or withdraw in part or entirety the RFP, or extend the deadlines, if the proposals received are not in compliance with the solicitation requirements.
- All material submitted by proposers become the property of Kenosha County upon submission, and therefore, public information, following completion of all RFP and appeal activities, and are subject to requirements of Wisconsin open records laws.
- As a Federal/State/County funded program, be aware that regulations may change during program operation and the program design may be affected resulting in modification by KCDHS. Request for Proposals are announced prior to the Division's budget being finalized, and therefore are tentative, may be modified, and are contingent upon final budget approvals.
- Non-Appropriation of Funds – If during the contract period, the appropriations that fund this contract are changed by federal, state, or county board, action or any oversight committees'

action, the funding amount of this contract may change. Additionally, Purchaser reserves the right to immediately terminate or cancel any contract in whole or in part without penalty due to non-appropriation of funds.

- Contract renewals are determined solely by Kenosha County subject to applicable funding requirements and department authorizations, availability of funds, satisfactory contract performance, and when applicable, negotiation of renewal rates.
- Performance and Reporting Requirements: Contractors are required to comply with the funding source requirements. Requirements may include submitting reports and attending meetings with KCDHS representatives to review services, to assess progress & performance, to identify barriers, and to determine if any corrective action measures are necessary. It is the responsibility of the service provider to provide corrective action plans and reports as needed.
- KCDHS reserves the right to negotiate changes in both reporting and billing requirements.
- KCDHS reserves the right to specify its individual reporting requirements.
- Data reporting requirements serve three purposes:
 - Meet Federal and State reporting requirement,
 - Provide information for program monitoring and management,
 - Provide for component and program evaluation
- Contract Reimbursement Policy: It is the intent of KCDHS to reimburse the actual approved costs or units of service provided under this RFP and reported each month. Payments will depend on timeliness, accuracy of reporting, and the achievement of quantitative and qualitative goals specified in the Program Description and Specifications and as otherwise required or negotiated.
- Contractors and KCDHS must comply with the applicable Office of Management and Budget OMB Uniform Guidance (2 CFR 200), OMB circulars, and other federal and state laws and regulations.
- To demonstrate the Contractor's financial capability, the County may require the submission of some, or all the financial information detailed below. The Contractor must provide the requested information within five (5) working days of the County's request, unless such time period is otherwise extended at the sole discretion of the County.
 - Audited Financial Statements for the Contractor's last three (3) fiscal years, including as a minimum the Balance Sheet, Statement of Retained Earnings, Income Statement, and any notes to the statements. If audited Financials are not available, a copy of the most recent business income tax return and Pro-Forma (un-audited) Financial Statements for the last three (3) years will be accepted.
 - Annual Report (if applicable) – most current annual report.
 - Audit/Fiscal Report – last completed fiscal year audit, completed by an independent auditor, or the year-end financial reports if audits are not required, and a statement as to why audits are not required.

- The County may require the submission of additional information such as:
 - Excerpts of Personnel Policies to include Employee Benefits relating to time off (vacation, sick, holidays, leave of absence, etc.)
 - Organization Chart - organizational chart.
 - Board of Directors (if applicable) – list of current Board of Directors and owners identified by name with middle initial, position held on Board office, address, employer, and occupation; and provide statement that Board members are 18 years of age or older.
 - Evidence of Board Approval (if applicable) - documentation stating that the governing board has given its approval for the submittal of the proposal.
 - County Employee Disclosure – list of all Kenosha County employees or former employees to a wage, a salary or an independent consultant fee was paid during the preceding 1 and 1/2 years.
 - Licenses and Accreditations – information on current licenses and accreditations held or required for staff and/or the organization.
- The County reserves the right, throughout the RFP Process and course of the Contract, to request evidence of the Contractor's financial capability and their ability to perform or meet all the standards and requirements.
- Kenosha County Policy on Ethics is included in this RFP as an Attachment and must be signed and returned with your proposal.
- Proposals may be withdrawn by written notice received at any time before the exact time set for receipt of Proposals.
- Contracts resulting from this RFP will not be considered authorized until a contract compliant copy of the insurance certificate is received by KCHDS.
- Current KCDHS insurance requirements
 - Your agency should be listed as insured.
 - Kenosha County should be listed as Certificate Holder
 - Worker's Compensation insurance as required by Wisconsin Statutes for all employees engaged in work associated with this contract and employer's liability insurance with a bodily injury per accident limit of liability of at least \$500,000, bodily injury by disease limit each employee of \$500,000 and bodily injury by disease policy limit of \$500,000
 - Commercial general liability insurance for personal and bodily injury and property damage against any claim(s) that might occur in carrying out this contract, with liability coverage provided for therein in the minimum amount of 1,000,000 per occurrence/ \$2,000,000 annual aggregate for all types of claims. The policy shall include an endorsement identifying Purchaser as Additional Insured.
 - Comprehensive automobile liability insurance for all owned, non – owned and hired vehicles that are used in carrying out the services of this contract, with

minimum one million dollars (\$1,000,000) combined single limit for automobile liability and property damage. Consistent with Wisconsin law, (s. 344.62, Wis.Stats.), it is mandatory that anyone operating a motor vehicle shall have motor vehicle liability insurance and a copy of proof of insurance available at all times. This policy shall include coverage for Purchaser for liability arising out of the actions of Provider, whether by Additional Insured endorsement or otherwise.

- Excess or umbrella liability insurance in the amount of \$5,000,000 per occurrence and in the aggregate. Such excess or umbrella policy shall be excess over the employer's liability, commercial general liability, and motor vehicle insurance and coverage shall be provided as Follow From and shall name Purchaser as Additional Insured.
- Human Services Organization Professional Liability insurance with limits not less than \$2,000,000 per occurrence and annual aggregate, covering claims alleging errors, oversight, or negligence pertaining to Provider's professional services. This requirement applies if the Provider is a Human Services Organization. Any applicable deductibles and/or retentions must be noted on the Certificate of Insurance.
- Medical Malpractice insurance with limits not less than \$1,000,000 per occurrence and \$3,000,000 annual aggregate, covering claims alleging care-related injuries, errors in treatment, medication errors, and misdiagnoses. This requirement applies if the Provider is a medical professional. Any applicable deductibles and/or retentions must be noted on the Certificate of Insurance.
- Cyber Liability insurance with limits of not less than \$1,000,000 for each occurrence and an annual aggregate of \$1,000,000 covering third-party claims involving privacy violations, information security, information theft, damage to or destruction of electronic information, intentional and/or unintentional release of personal private information, alteration of electronic information, extortion, and network security. This requirement applies if the Provider has access to or control over third-party personal private information.
- Professional Liability Insurance with limits not less than \$2,000,000 per occurrence and annual aggregate, covering claims alleging errors, oversight, or negligence pertaining to Provider's professional services. Any applicable deductibles and/or retentions must be noted on the Certificate of Insurance.

Conflict of Interest: Contractors awarded contracts under this RFP shall ensure the establishment of written policies and employment rules and other safeguards to prevent, and shall prevent, its employees, consultants, or agents from attempting to influence Kenosha County officials, employees, or its various committees, commissions, workgroups, departments, authorities, centers, services, consultants, agents, or members of the Kenosha County Board of Supervisors, from using their public positions for purposes that are, or give the appearance of being, motivated by a desire for private gain for themselves or others with whom they have family, business, or other ties. Please note that it is a crime under Sec. 946.13 Wis. Stats., if any public official or employee shall, in his private capacity, negotiate or bid for or enter into a contract in which he has private pecuniary interest, direct or indirect, if at the same time he is authorized or required by law to participate in his capacity as such officer or employee in the making of that contract or to perform in regard to that contract some official function requiring the exercise of discretion on his part, nor shall any official or employee, in his official capacity, participate in the making of a contract in which he has a private pecuniary interest, direct or indirect, or perform in regard to that contract some function requiring the exercise of discretion.

V PROGRAM DESCRIPTION & SPECIFICATIONS/SCOPE OF WORK

The Kenosha County Division of Aging and Disability Services is committed to inspiring hope and promoting health and quality of life for all individuals served. Guided by a vision of a world where all people are understood, valued, and supported to live their best life possible, the Division seeks partnerships with contractors who share and uphold these principles in the delivery of services. All contracted services shall be provided in a manner consistent with the division's core values:

- People First- recognizing that every person is the expert on their own life and committing to listening, empowerment, and the removal of barriers.
- Advocacy- We commit to equity, fairness, dignity and potential. We speak out when needed and work for change.
- Kindness- We commit to treating everyone with compassion and respect through words, tone, and action.
- Partners Matter- We do more together than alone.
- Trustworthy- We strive to be objective, reliable, and accurate in our stewardship of the public good.
- Learning Together- We never stop seeking to serve better.

Kenosha County is seeking qualified service providers to deliver comprehensive dementia and caregiver support services in alignment with the priorities and program frameworks established under the Division of Aging and Disability Services.

1. DEMENTIA CARE

1.1. Programming Purpose

The mission of the Dementia Care Specialist Program is to support people with dementia and their caregivers to ensure the highest quality of life possible while living in their home.

1.2. Staffing and Coverage

1.2.1. Hours:

Coverage must be assured from 8:00-5:00 Monday-Friday, with occasional evening and weekend outreach.

1.2.2. Qualifications and Requirements

DCS must hold a Bachelor of Arts or Science degree, preferably in the health or human services related field; a master's degree is preferred. At least one year of full-time paid experience working directly with multiple people with dementia and family, or informal caregivers. Must hold a valid Wisconsin driver's license and reliable transportation for in-home visits.

The DCS must maintain their current knowledge of dementia, evidence based and best practices in dementia care, and medical research through continuing informal and formal education, participation at conferences, webinars, and training events.

The DCS is expected to attend all recurring, virtual team meetings, and participate in regional and statewide program meetings. DCS are required to attend annual, statewide, in-person training in the fall. Participation in other in-person, statewide, training courses are optional, though strongly encouraged.

The DCS is required to review the Memory Screening in the Community Manual [Memory Screening in the Community Manual](#) and complete training with DHS staff in order to conduct memory screens.

1.2.3. FTE:

At least 1.0 FTE dementia care specialists shall be hired and located within DADS. FTE is not to be permanently reduced or increased without prior Kenosha County consent.

1.3. Target Populations

Individuals living with Alzheimer's disease or related dementias, caregivers and support networks, as well as professional and community stakeholders

1.4. Core Service Components

1.4.1. The dementia care specialist (DCS) has three goals, which are referred to as the three pillars of the program. The three pillars are:

1.4.1.1. Train staff at the ADRC and other county and municipal offices, as well as Tribal Partner agencies, to assist local systems to become dementia-capable

1.4.1.1.1. Complete memory screening training with ADRC staff

1.4.1.1.2. Measure the change in knowledge and attitudes about dementia in staff members using the Dementia Knowledge and Assessment Tool (DKAT).

1.4.1.1.3. Provide training to ADRC staff to be dementia capable.

1.4.1.2. Help communities become dementia-friendly where people with dementia can remain active and safe, and caregivers can feel supported by their community. The following should be in place:

1.4.1.2.1. Dementia-specific community coalition

1.4.1.2.2. Active memory cafe(s)

1.4.1.2.3. Dementia friendly business training

1.4.1.3. Provide education and support to people with memory concerns or dementia, and their families, and support network, to allow them to live at home safely.

1.4.1.3.1. Complete memory screens and provide support in accessing a diagnostic evaluation

1.4.1.3.2. Referrals to services that support the customer in remaining independent in the home

1.4.1.3.3. Information and education about dementia, communication strategies, and safety considerations for the family or support network

1.4.1.3.4. Informed referrals to research opportunities

1.4.1.3.5. Assistance with advanced and ongoing care planning

1.4.1.3.6. Connections to enrichment opportunities, including memory cafes, early-stage support groups, caregiver support groups, and recreational activities

2. **CAREGIVER SUPPORT**

2.1. Programming Purpose

Caregiver support programs, also referred to as National Family Caregiver Support Program (NFCSP), coordinate services to provide support and services to family members, friends and others who provide in-home care for older adults, older relative caregivers of

children and caregivers of adults with severe disabilities. The addition of family caregiver support also recognizes the financial hardships, emotional stressors, employment, and other conflicts experienced by caregivers who provide around-the-clock care at home. Caregiver support services are designed to help alleviate these daily pressures.

2.2. Staffing and Coverage

2.2.1. Hours

Coverage must be assured from 8:00-5:00 Monday-Friday, with occasional evening and weekend outreach.

2.2.2. Qualifications and Requirements

The caregiver support coordinator must have a Bachelor of Arts or Science degree and at least one year of experience working with one or more of the client populations of the ADRC. At least one year of full-time paid experience working directly with family or other informal caregivers. Must hold a valid Wisconsin driver's license and reliable transportation for in-home visits.

The caregiver support coordinator must maintain their current knowledge of community resources, best practices in information and assistance as related to caregiver support, and training and support groups for caregivers through continuing informal and formal educations, participation at conferences, webinars, and training events. Organize public information/education campaigns, with community partners in designated months focused on caregiver support and resources.

The caregiver support coordinator is expected to attend all recurring, virtual team meetings, and participate in regional and statewide program meetings. Participation in other in-person, statewide, training courses are optional, though strongly encouraged.

The caregiver support coordinator is required to review the Caregiver Support Aging Operations Manual, including any updates and required training as identified in [Aging Policy Manual: Family Caregiver Support](#).

2.2.3. FTE

At least 1.0 FTE caregiver support coordinator shall be hired and located within DADS. FTE is not to be permanently reduced or increased without prior Kenosha County consent.

2.3. Target Population

2.3.1. Caregivers for older adults who are family members and friends age 18+ who are caring for individuals aged 60 or older, or who are caring for a person of any age diagnosed with irreversible dementia.

2.3.2. Older relative caregivers including

2.3.2.1. Grandparents or older relatives age 55+ caring for children younger than 18 years of age

2.3.2.2. Relative caregivers providing care for adults with a disability who are between the ages of 18 and 59 years of age.

2.4. Core Service Components

- 2.4.1. Caregiver support manages caregiver NFCSP and AFCSP grants, assuring compliance with grant requirements. Provider staff are required to use the following instruments to meet minimum service requirements of the AFCSP and NFCSP.
 - 2.4.1.1. Complete caregiver needs assessment.
 - 2.4.1.2. Information to caregivers about available resources.
 - 2.4.1.3. Assistance to caregivers in gaining access to services.
 - 2.4.1.4. Case management.
 - 2.4.1.5. Individual counseling, organization of support groups, and training to assist caregivers in making decisions and solving problems related to their caregiver roles.
 - 2.4.1.6. Respite services to enable caregivers to be temporarily relieved from their caregiving responsibilities.
 - 2.4.1.7. Supplemental services, on a limited basis, to complement the care provided by caregivers.

COMMUNITY OUTREACH AND PROFESSIONAL EDUCATION

Provider staff are required to conduct community outreach for the respective programs. Staff will facilitate required evidence-based health promotion programs from P-02009: [Program List](#). One of the two programs must be evidence based and specific to serving family caregivers. Staff will complete the necessary training to provide these programs.

Staff are required to facilitate and support the Kenosha County Caregiver Coalition monthly, including but not limited to increasing membership and meeting participation, and arranging speakers.

Staff are required to organize and facilitate Caregiver Luncheon annually.

DATA COLLECTION, REPORTING, AND QUALITY ASSURANCE

Data Collection Requirements

Provider shall collect and maintain accurate records for all enrolled participants in the client tracking system. All documents related to participant records must be uploaded to the client tracking system

Reporting Requirements

The provider shall submit reports to Kenosha County on a schedule defined in the final contract, which shall include at minimum:

- Monthly service activity report with success stories
- DCS Workplan template
- 100% time and task reporting completed by DCS per [Time and Task Reporting for Dementia Care Specialists](#).

Quality Assurance

Provider will follow the scope of services and operations manuals for the aging and disability resource center and/or aging. Provider will implement and maintain a quality assurance process to ensure all services meet or exceed standards set forth by Department of Health Services and Kenosha County

OUTCOME MEASURES

OUTCOME	MEASURE
Case notes entered in client tracking system within 24 hours	Client tracking system reporting-Peer Place
New referrals are contacted within 48 hours of referral	Client tracking system reporting-Peer Place
80% of direct time reflected in client tracking system	Client tracking system reporting-Peer Place
90% of people served will express satisfaction with services	Consumer Surveys
Memory Café held monthly	Client tracking system reporting-Peer Place and Monthly Reporting
3 Powerful Tools Classes held annually	Client tracking system reporting-Peer Place and Monthly Reporting
Complete an evidence based or evidence informed program at least twice annually	Client tracking system reporting-Peer Place and Monthly Reporting
Caregiver Coalition held monthly	Monthly Reports and Meeting Minutes
Complete 4 public information, education and/or outreach events annually	Outreach forms and Monthly Reporting

OPERATIONS MANUALS

Dementia Care Specialist ADRC Operations Manual: [ADRC Operations Manual – Dementia Care Specialist Program](#)

Caregiver Support Aging Operations Manual: [Aging Policy Manual: Family Caregiver Support](#)

VI PROPOSAL DESIGN

All content created for the proposal must be complete, thorough and demonstrate professional organizational and writing abilities. The proposal must address all requirements and specifications of the RFP and include all required documentation. The proposal must be typed in a single space format using a 12-point font in the same order as listed below. Proposals which do not comply with the format set forth may be rejected without further consideration.

Cover Letter

Include a cover page/letter of transmittal offering your proposal for the County's consideration, signed by an authorized agent of your company.

Specifically state that the information contain the Proposer's Proposal is accurate and complete as of the date of submission; and that the Proposer is willing to comply with all stated contractual requirements.

The Cover Letter should include the following information:

- Your name
- Your organization
- Contact details
 - Name
 - Email
- Title of Proposal
- RFP #
- Signed by an Authorized agent of your company

Table of Contents

A table of contents should be included, and each page of the proposal should be consecutively numbered.

Project Overview:

Project overview should be organized to the following underlined headings:

Organization Experience & Capacity

Provide a concise statement of the mission, goals, and a brief history of the organization.

Include information on business formation, size, number of years in business, scope of services, and highlights of achievements.

Address and describe the following:

- Administrative and management background
 - management team

- administrative support
- staff supervision
- Organization's collaborative and cooperative history and flexibility to meet changing programmatic and administrative requirements.
- Staff qualifications, staff retention rates and methods of minimizing staff turnover. Staff qualifications to deliver proposed design, key staff members' length of service, proposed staffing patterns, and staff to participant ratios. List all staff positions related to proposed services and include the following for each:
 - Position title, responsibilities, and duties for proposed service.
 - Percentage of FTE assigned to this component.
 - Qualifications of staff position (degrees, training, and experience).

Address and describe the following:

- Experience with proposed service & target population.
- An understanding of the service needs of the target population.
- A record of successful provision of similar services to target population, and achievement of service goals and planned outcomes.
- Level of experience in managing proposed services.
- Experience with state and local performance tracking systems.

Strategic Planning Approach & Program Performance

Describe in detail the service to be provided, client groups, service methodology, and goals.

Address and describe the following:

- Proposed service methodology and how it meets program specifications.
- Program design and how it addresses service needs of the target population.
- Service levels and how it addresses service needs of population.
- Innovative and creative approaches to service.

Address and describe the following:

- Describe plan/method for meeting the performance requirements, and method for collecting, analyzing, monitoring, measuring, documenting, and evaluating service performance and outcomes achieved.
- Describe how corrective actions will be completed and reported, if necessary, based on results of performance monitoring.

Budget Approach / Cost Effectiveness

Proposer is required to provide a compelling and well-documented narrative that outlines the cost-effectiveness of their solution.

Effective and efficient delivery of quality services is demonstrated in relation to the budget allocation. The allocation is reasonable and appropriate.

- Demonstrate that described financial/information systems are adequate to meet the program specifications.
- If a previous KCDHS provider, demonstrate that data reports have been accurate and timely, and that other reporting requirements have been met.
- Provide information for reviewers to determine reasonableness of the cost and revenues included in the budget. In this section also indicate the not-to-exceed percentage increase for three (3) succeeding years. Identify the administrative cost and method for the allocation basis. Attach a detailed explanation of allocation method used to the Budget Worksheets.

Proposal Support Documentation & Addenda

Include all support documentation with your proposal:

- RFP Attachment 1 - Vendor/Provider Information
- RFP Attachment 2 - Assurances
- RFP Attachment 3 - Ethics Compliance Notice
- RFP Attachment 4 – Ethics Compliance Addendum
- RFP Attachment 5 – Designation of Confidential and Proprietary Information
- RFP Attachment 6 – Business Experience
- RFP Addenda(s) if applicable
 - You are required to include all RFP Addenda(s) posted on VendorNet
- RFP Attachment Excel – Budget Worksheet

KCDHS reserves the right to request additional documentation or information if necessary to adequately review proposals and/or as needed at time of contract award.

Budget Program and Guidelines

Submit the budget worksheet with your proposal. The budget worksheet is an EXCEL file, with five separate worksheet tabs. All worksheets are designed to have proposers enter information in designated blue areas only. Begin on worksheet tab #1. Once entered, specific information will automatically copy to other worksheets. The yellow and gray areas of the worksheets are calculations and should be verified for accuracy.

- Proposers may identify funds beyond this proposal for purposes of coordination or collaboration. Use worksheet tab #5 to report additional revenue sources and related expenditures; these must not be included in the specified program budget.
- Proposers must comply with the Uniform Guidance 200 (2CFR 200) for allowable costs. Wisconsin
- Local policy does not allow:
 - Any charges for program costs not directly applicable to the funded program.
 - Any charges or costs deemed unreasonable or excessive to operations of the program or service.

- For profit agencies may not exceed 5% of profit
- KCDHS allows for a maximum of 15% administrative cost.
- KCDHS may, in the negotiation of a contract budget, disallow certain proposed cost items, reduce certain proposed cost items, and/or realign or increase proposed cost items.
- The proposed budget shall include all costs associated with the operation of this program.
- When there is a correlated Medicaid benefit, KCDHS expects providers to make every reasonable effort to control service rates and maximize revenue, billed through such methods as third-party payments and MA billing.
- All questions including those regarding the budget worksheets, must be emailed to the RFP single point of contact.

VII RFP SUBMISSION

It is the responsibility of the proposer to thoroughly examine the entire RFP document and to ensure the proposal is **received on time**.

Late responses will be rejected.

Proposers must submit their RFP response, support documentation, addenda's (if applicable), and budget worksheet via email to the single point of contact:

Monica Santos
monica.santos@kenoshacountywi.gov

Email Subject Line: RFP #202602 Dementia & Caregiver Support Services

Your proposal response should include 2 attachments:

1. All sections requested within one (1) electronic PDF document.
2. The budget worksheet must be submitted in Excel format.

You will receive a 'received' confirmation.

IMPORTANT

If attachments exceed limit of email service, save your files to a cloud service, and share the link.

Late proposals will **NOT** be considered.

Proposals that do not meet the deadline date and time requirements will not be reviewed.

No exceptions will be allowed.

KCDHS reserves the right to reject incomplete proposals.

Kenosha County is not responsible for the content of any proposal information received through any 3rd party RFP/bid service. It is the sole responsibility of the proposer to ensure the completeness of the documents received from any 3rd party.

VIII EVALUATION & SELECTION

The proposals will be scored using the following criteria:

Proposal Review Criteria	Possible Points
Organization experience & Capacity	40
Strategic Planning Approach & Program Performance	40
Budget Approach & Cost Effectiveness	20
	100

- A. Proposals will be initially reviewed to determine if minimum and mandatory requirements have been met. Failure to meet these requirements shall result in the Proposal being rejected. In the event that all Proposers do not meet one or more of the minimum or mandatory requirements, the Evaluation Committee reserves the right to continue the evaluation of the Proposals, which most closely meet the minimum and mandatory requirements of this RFP.
- B. Failure by the Proposer to provide information clearly and accurately within the submitted documents may be reflected in the evaluators' scoring results.
- C. Proposals will be independently evaluated. Each Evaluation Committee member will score each of the Solicitation's stated technical evaluation criteria for each Proposer. Contract Specialist will then sum all individual technical scores for each Proposer to determine the overall evaluation score for that Proposer. Based on the information obtained through any confirmation or verification inquiries, reference checks or interview process, the Evaluation Committee will review their evaluations and unilaterally adjust their respective scores.
- D. All evaluations and score tabulation results remain strictly confidential between the Evaluation Committee members and the Evaluation Committee Chair.
- E. A contract award recommendation is made based on the scoring results. Notification letter is posted on VendorNet.
- F. Kenosha County intends to select the proposal ranked to be the most advantageous to the program through the evaluation procedures/ selection process.
 - a. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance and financial and technical resources.
- G. In its sole discretion, Kenosha County Department of Human Services may hold interviews, ask questions, seek clarifications, and/or conduct discussions to aid in the final selection.
- H. Top-scoring Proposer(s) based on the evaluation of the written Proposal may be required to participate in a presentation and/or demonstration to support and clarify their Proposal(s), if requested by the County. The presentations and/or demonstrations will be scheduled and held after receipt of the Proposals to provide an opportunity for the Proposer to clarify its Proposal and for the Evaluation Committee to ask questions. Proposer representative(s) attending the oral presentation or demonstration shall be technically qualified to respond to questions related

the Proposal and its components. The County will furnish specific details concerning the presentations or demonstrations and any required materials at the time it notifies Proposers of the presentation schedule.

- I. The County shall make every reasonable attempt to schedule each presentation at a time and location agreeable to the Proposer. The County requires that those individuals designated by the Proposer as key personnel attend the presentation in person. Failure of a Proposer to interview or permit a site visit on the date scheduled may result in rejection of its Proposal.
- J. No County official, employee, or representative on the Evaluation Committee shall have any financial interest, either direct or indirect, in the Proposal or Contract or shall exercise any undue influence in the awarding of the Contract. Violation of this rule could result in the Proposer's disqualification from further consideration for award.
- K. If only one Proposal is received in response to this RFP, information may be requested from the Proposer to enable the County to perform a cost/price analysis, evaluation, and audit in order to determine if the price is fair and reasonable, to negotiate a fair and reasonable price, or to reject the Proposal.
- L. Any contract resulting from this RFP process is contingent on the applicable program funding and the Department's contracting and budget approval process. Funding levels and performance requirements may change from those listed within the RFP; therefore, Kenosha County may negotiate the terms of any resulting contracts, award amount, authorized budget items, and performance plans prior to entering into an agreement.
- M. Appeal Process-only the RFP respondents (proposers) who have submitted a proposal can make an appeal request. The appeal process is to determine if decision making for the award followed evaluation procedures (outlined in the RFP); proposers can only appeal violations of those procedures; scoring by the evaluation panel and ranking are not subject to appeal. An Appeal request must be submitted in writing by the director or board president, no later than 5 days of the issued/posted award recommendation. Appeal must state the basis of the appeal, fully identifying the procedural violation and reasons to support the appeal(s). The Appeal request and applicable information will first be reviewed with KCDHS and may be discussed with the proposer. If resolution cannot be achieved, the proposer may be invited to an appeal review before an Appeals Committee for an opportunity to present the violations noted in the appeal request. If all submitted proposals are rejected, there is no appeal process.

END OF DETAILED SPECIFICATIONS

**ATTACHMENT #1
PROPOSER INFORMATION**

Agency/Business Name _____ Years in Business _____

Federal Tax ID Number _____

Business Type: ☐Corporation ☐Non-Profit Corp ☐LLC ☐Sole Proprietorship ☐Other _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Proposer Name _____

Proposer Title _____

Proposer Email Address _____

Contract Signor Name _____

Contract Signor Title _____ Contract Signor Phone # _____

Contract Signor Email Address _____

Billing Contact Name: _____ Title _____

Billing Address _____ Billing Phone # _____

City: _____ State: _____ Zip: _____

Billing Email Address _____

CERTIFICATION: In making this proposal, the proposing organization certifies:

- 1) that all applicable regulations and policies of KCDHS, the State of Wisconsin will be adhered to;
- 2) that all proposal information submitted is complete and correct, and that it is submitted in response to the KCDHS Request for Proposal (RFP) with acknowledgment of all RFP content, information, and addenda;
- 3) that the signor of this proposal is authorized by the proposing organization to submit and certify this proposal, and
- 4) that the proposing organization is a legal entity under laws of the State of WI or authorized to operate in the State of WI. An original signature is required below with the original proposal.

I further certify that I am a duly authorized agent of this company, I have examined this proposal from the written specifications and information and have checked the same in detail before submitting said proposal to the County. I have full authority to make such statements and submit this proposal, and all statements submitted are true and correct.

Authorized Signature: _____ Date: _____

Print Name / Title: _____ Date: _____

ATTACHMENT #2 ASSURANCES

Funds: The contractor agrees that (a) funds granted as a result of this request for proposal are to be expended for the purposes set forth within and in accordance with all applicable laws, regulations, policies and procedures of the State of Wisconsin or the Federal Funding Agency, as applicable; (b) no expenditures occurring prior to the effective date of a grant/contract award will be eligible for inclusion; and (c) funds awarded by the funding source(s) may be terminated at any time for violation of any terms and requirements of this agreement.

Title VI of Civil Rights Act of 1964: The contractor will ensure compliance with the Title VI of the Civil Rights Act of 1964 (P.L. 88-342), and all requirements imposed by or pursuant to the regulations HHS (45 CFR Part 80) and issued pursuant to that title. To that end, and in accordance with Title VI of that act and the regulations, no person shall, on the grounds of race, color or national origin, be excluded from participating in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity in which the designated contractor received federal assistance, or financial assistance from the Department; and **HEREBY GIVES ASSURANCE THAT** it will immediately take any measures necessary to effectuate this agreement.

Title IX of the Education Amendment of 1972: The contractor shall ensure compliance with Title IX of the Education Amendment of 1972 which state that no person in the United States shall, on the basis of sex, be excluded from participating in, be denied the benefit of, or be otherwise subjected to discrimination under any education program or activity for which the contractor receives or benefits from Federal financial assistance.

Rehabilitation Act of 1973 and Age Discrimination Act of 1975: The contractor shall comply with Section 504, Rehabilitation Act of 1973, which prohibits discrimination on the basis of a physical condition or handicap, and the Age Discrimination Act of 1975, which prohibits discrimination because of age.

Wisconsin Statutes: 946.10 and 946.13: The contractor shall ensure the establishment of safeguards to prevent employees, consultants, or members of governing bodies from using their position for purpose that are, or give the appearance of being, motivated by a desire for private gain for themselves or others, such as those with whom they have family, business, or other ties as specified in Wisconsin Statutes 946.10 and 946.13.

Alcohol and Substance Abuse and Drug Testing: The contractor shall ensure that it maintains and enforces alcohol and substance abuse policies appropriate to the organization and consistent with the fullest extent allowed by law, including mandatory drug and alcohol testing for all driving personnel who drive clients, to ensure drivers are free from intoxicants or drugs that impair driving.

Privacy Rules and Regulations and Confidentiality: The contractor shall ensure that it maintains compliance with the Health Insurance Portability and Accountability Act of 1996, (HIPAA) Privacy Rules and Regulations.

The contractor understands and agrees to comply with the "Assurances" if awarded a contract.

The undersigned has the legal authority and capacity to enter into this agreement and a motion has been duly passed as an official act of the governing body authorizing the execution of this agreement and authorizing the person identified as the official representative of the business to act in connection with the business and to provide such additional information as may be required.

SIGNATURE OF AUTHORIZED BUSINESS REPRESENTATIVE:

Authorized Official Signature _____ Date _____

Print Name & Title of Authorized Official

Print Name of Business

ATTACHMENT #3

ETHICS COMPLIANCE NOTICE

PUBLIC NOTICE PERTAINING TO ALL REQUESTS FOR PROPOSALS AND BIDS REGARDING KENOSHA COUNTY POLICY ON ETHICS IN GOVERNMENT

In addition to ethical standards set forth in Wisconsin Statutes Section 19.59 for all County employees and officials [either elected or appointed] Kenosha County has adopted an Ethics Policy that is applicable to County employees in conducting county business. That policy may be reviewed at

<http://www.kenoshacounty.org/DocumentCenter/Home/View/578>

The Ethics Policy is intended to ensure that public trust in Kenosha County government is maintained and that decisions affecting the county and its citizens are made fairly and impartially for the benefit of all citizens and not for personal gain. This policy precludes:

- the misuse or misappropriation of County property or funds for personal use or otherwise,
- use or disclosure of confidential information for personal gain or otherwise,
- elimination of conflicts of interests, receipt of gifts or favors or other considerations of value by County employees,
- the use of the employee's public position to influence or gain unlawful benefits or to influence or gain advantages or privileges for the employee,
- and the conducting of personal business or campaigning during working hours.

This policy, furthermore, requires employees to disclose and report to the proper authorities any violation of this policy by either other employees or by any nonemployee or citizen seeking to or aiding or abetting in efforts to circumvent this policy. Any employee failing to make such disclosure or report is subject to discipline.

Contracts with Kenosha County also require that any party contracting with Kenosha County also report any violation to either the District Attorney or Corporation Counsel for Kenosha County.

In addition, Wisconsin Statutes Sections, 946.12 involving misconduct in public office and 946.13 involving a private interest in a public contract are considered Class 1 felonies and activity considered in violation of these statutes will be reported to the Kenosha County Sheriff for investigation and the Kenosha County District Attorney for prosecution.

In submitting a bid or proposal in response to a request for bids or proposals, a party must acknowledge both in this response as well as in any subsequent contract that:

1. The party has read this notice in its entirety, understands its content and agrees to be bound by the provisions herein, and
2. The party knows of no conflicts of interest or appearance of a conflict or appearance of an impropriety on the part of any current or former county official or employee who may have had a role on deciding which proposal or bid will be accepted, and
3. It is acknowledged that it is a crime under sec. 946.13 wis. stats., if any public official or employee shall, in his or her private capacity, negotiate or bid for or enter into a contract in which he or she has a private pecuniary interest, direct or indirect, if at the same time he or she is authorized or required by law to participate in his other capacity as such officer or employee in the making of that contract or to perform in regard to that contract some official function requiring the exercise of discretion on his or her part, nor shall any official or employee, in his official capacity, participate in the making of a contract in which he or she has a private pecuniary interest, direct or indirect, or performs in regard to that contract some function requiring the exercise of discretion on his or her part. in the event wis. stat, secs. 946.12 and 946.13 are violated, it is understood that this contract may be voided at the discretion of kenosha county.
4. Question pertaining to conflicts or appearance of an impropriety may be addressed to the office of the Kenosha County Corporation Counsel.
5. Violations are required to be reported, and

6. No attempt has been made by anyone on behalf of the party submitting the proposal or bid to directly or indirectly illegally influence the awarding of a contract by promise of or delivery of any consideration or any thing of value to a current or former county official or employee or family or household member of a current or former county official or employee, or in any other manner contrary to law, and
7. Kenosha County prohibits communication relative to this request for proposal or bid by a proposer or bidder with any county elected official or employee prior to the time an award has been made, except as provided for in this request for proposal or bid invitation. Violation of this section is grounds for disqualification of the party's proposal.
8. Other than the county representative noted herein, no other employee or representative of Kenosha County is authorized to interpret any portion of the request for proposal or bid or give information as to the requirements of this request or amendment thereto. Bidders are instructed not to contact any other county department or employee regarding this proposal.
9. Written questions will be answered in writing to the proposer requesting a response. Proposer's questions and the county's responses will become a public record, and
10. The parties acknowledge that Kenosha County is a municipal corporation legally bound to comply with the Wisconsin open meetings and public records law and that as such, unless otherwise allowed for by law, all aspects of this agreement are subject to open discussion and disclosure and are a matter of public record. It is furthermore agreed to that no party will take any action to obstruct the operation of these laws. If records are created or maintained or in the custody of the provider, as an independent contractor, they, along with the raw data used to create the record, are, nevertheless, public records. Within legal constraints related to confidentiality and privacy protection, such records must be made immediately available to the public upon request and in the format in which they were created. Provider agrees to hold the county harmless and to indemnify the county for all costs, fees, including all attorney fees and judgments and damages of whatever kind for which the county may be held liable due to the provider's failure to comply with the Wisconsin public records and open meetings laws, or this agreement.
11. That any subsequent finding of a violation of the county's ethics policy by any party or any agent of any party acting either alone or acting in concert with a current or former Kenosha County official or employee may result, at the sole option of Kenosha County, in any subsequent agreement being declared null and void and / or may result in the party violating this policy being debarred from submitting proposals, bids or contracting with Kenosha County for a specified period of time in the future.

ATTACHMENT #4
ETHICS COMPLIANCE ADDENDUM

It is agreed and understood by all parties to this contract that:

1. In addition to ethical standards set forth in Wisconsin Statutes section 19. 59 for all county employees and officials [either elected or appointed] Kenosha county has adopted an ethics policy that is applicable to county employees in conducting county business. That policy may be reviewed at <http://www.kenoshacounty.org/DocumentCenter/Home/View/578>. It is further understood that all county employees and officials [either elected or appointed] are prohibited from engaging in any criminal conduct contrary to Wisconsin Statutes sections 946.12 involving misconduct in public office and 946.13 involving a private interest in a public contract.
2. This ethics policy is intended to ensure that public trust in Kenosha county government is maintained and that decisions affecting the county and its citizens are made fairly and impartially for the benefit of all citizens and not for personal gain. This policy precludes the misuse or misappropriation of county property or funds for personal use or otherwise, use or disclosure of confidential information for personal gain or otherwise, elimination of conflicts of interests, receipt of gifts or favors or other considerations of value by county employees, the use of the employee's public position to influence or gain unlawful benefits or to influence or gain advantages or privileges for the employee, and the conducting of personal business or campaigning during working hours.
3. This policy, furthermore, requires employees to disclose and report to the proper authorities any violation of this policy or State Statute by either other employees or by any non-employee or citizen seeking to or aiding or abetting in efforts to circumvent this policy. Any employee failing to make such disclosure or report is subject to discipline. This contract also requires that any party contracting with Kenosha County also report any such violation to either the District Attorney or Corporation Counsel for Kenosha County.
4. By executing this contract, each party certifies that it knows of no conflicts of interest or appearance of a conflict or appearance of an impropriety on the part of any current or former county official or employee who may have had a role on deciding which proposal or bid will be accepted, and
5. By executing this contract, each party certifies that no attempt has been made by anyone on behalf of the party submitting a proposal or bid to directly or indirectly illegally influence the awarding of a contract by promise of or delivery of any consideration or any thing of value to a current or former County official or employee or family or household member of a current or former County official or employee, or in any other manner contrary to law, and
6. The parties acknowledge that Kenosha County is a municipal corporation legally bound to comply with the Wisconsin Open Meetings and Public Records laws and that as such, unless otherwise allowed for by law, all aspects of this agreement are subject to open discussion and disclosure are a matter of public record. It is furthermore agreed to that no party will take any action to obstruct the operation of these laws. If records are created or maintained or in the custody of the provider, as an independent contractor, they, along with the raw data used to create the record, are, nevertheless, public records. Within legal constraints related to confidentiality and privacy protection, such records must be made immediately available to the public upon request and in the format in which

they were created. Provider agrees to hold the County harmless and to indemnify the County for all costs, fees, including all attorney fees and judgments and damages of whatever kind for which the County may be held liable due to the provider's failure to comply with the Wisconsin Public Records and Open Meetings laws.

7. That any subsequent finding of a violation of either the County's ethics policy or Wisconsin Statutes sections, 19.59, 946.12 and 946.13 by any party or any agent of any party acting either alone or acting in concert with a current or former Kenosha County official or employee may result, at the sole option of Kenosha County, in this agreement being declared null and void and / or may result in the party violating this policy being debarred from submitting proposals, bids or contracting with Kenosha County for a specified period of time in the future.

SIGNATURE OF AUTHORIZED REPRESENTATIVE:

Authorized Official Signature _____ Date _____

Print Name & Title of Authorized Official

Print Name of Business

ATTACHMENT #5
DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

The attached material submitted in response to Bid/Proposal # _____ includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released without our written approval.

Prices always become public information when bids/proposals are opened and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released

Section #	Page #	Topic / Description

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY AND AGREES TO HOLD THE COUNTY OF KENOSHA HARMLESS FOR ANY COSTS OR DAMAGES ARISING OUT OF THE STATE'S AGREEING TO WITHHOLD THE MATERIALS.

Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The county considers other markings of confidential in the bid/proposal document to be insufficient. The undersigned agrees to hold the state harmless for any damages arising out of the release of any materials unless they are specifically identified above.

SIGNATURE OF AUTHORIZED REPRESENTATIVE:

Authorized Official Signature _____ Date _____

Print Name & Title of Authorized Official

Print Name of Business

**ATTACHMENT #6
BUSINESS EXPERIENCE**

Provide business contact information for the most recent business experience, **EXCLUDE ANY CONTACTS FOR KCDHS**. Kenosha County reserves the right to contact any number of the business listed for purposes of this RFP.

1. Business / Company Name _____
Address _____
City, State, Zip _____
Contact Name/Title _____
Phone # _____ E-mail _____
Contract Start and End Date _____
Reason for Contract Ending _____
Services provided _____

2. Business / Company Name _____
Address _____
City, State, Zip _____
Contact Name/Title _____
Phone # _____ E-mail _____
Contract Start and End Date _____
Reason for Contract Ending _____
Services provided _____

3. Business / Company Name _____
Address _____
City, State, Zip _____
Contact Name/Title _____
Phone # _____ E-mail _____
Contract Start and End Date _____
Reason for Contract Ending _____
Services provided _____