



Invitation for Proposal 2026-AS-9400
Title: Access to Services through Knowledge (ASK) Web-based Platform

Attention Interested Parties

Date of Release: June 9, 2026

Due Date: All submissions must be received by 4:00 p.m. (EDT) on July 9, 2026.

Notification of Winning Proposal Results: August 5, 2026

Contact: All questions related to this Invitation for Proposal shall be sent via email by 4:00 p.m. (EDT) on June 19, 2026, to:

Florida Developmental Disabilities Council, Inc.

proposal@fddc.org

QUESTIONS ARE TO BE SUBMITTED IN WRITTEN FORMAT ONLY. THIS IS A LEGAL PROCESS AND WE CANNOT ANSWER QUESTIONS VERBALLY. Answers to any questions received will be posted on the FDDC website (fddc.org) by June 25, 2026.

Cone of Silence: For purposes of this solicitation, FDDC has established a solicitation silence policy (Cone of Silence) that prohibits oral and written communication regarding all formal solicitations for goods or services (formal proposals, Request for Proposals, Invitation for Proposals, Request for Bids) issued by the FDDC with the exception of the formal written questions that may be submitted as described above. The period commences from the date of advertisement until award of contract.

Applicable Laws and Regulations: All applicable Federal and State laws, county and municipal ordinances, orders, rules and regulations of all authorities having jurisdiction over the services to be provided shall apply to the bid/proposal throughout, and they will be deemed to be included in the contract the same as though they were written in full therein.

Funds Available: The Florida Developmental Disabilities Council, Inc. (FDDC) has set aside a maximum of **\$300,000** federal funds for a period not to exceed 12 months for fiscal support of this proposal. The award will remain firm for the contract period unless addendums to the scope of work are required by the funder. It is anticipated that additional funding will be available beginning October 1, 2027, for annual continuation, pilot testing, maintenance, updates, and evaluation activities through the end of the Council's 2027-31 state plan on September 30, 2031.

Funding Source: 100% federal funds, CFDA #93.630 from the U.S. Department of Health & Human Services, Administration on Intellectual and Developmental Disabilities, through FDDC.

Required Match: No match is required.

Ineligible Entities: Federal regulations limit and restrict the ability of individuals or entities debarred or suspended by a Federal Agency from doing business with, or contracting for the use of federal funds with, the Council. See 29 CFR, Part 98; 45 CFR, Part 76.

Evaluation of Award: All proposals received by the due date and time will be evaluated by the FDDC. Each submitted proposal that is responsive as determined by FDDC by meeting the minimum qualifications and price will be reviewed and scored according to the criteria set forth in the Invitation for Proposals by a scoring committee. The Council will then undertake a risk review of the offeror for each proposal scoring over a 70. This review will consist of three components: (1) a self-assessment of risk completed by the applicant; (2) inherent risk assessment; and (3) an assessment of prior performance if the offeror has previously contracted with the Council.

An offeror will receive a rating of LOW, MODERATE, or HIGH for each applicable component. A rating of HIGH risk does not preclude the offeror from receiving the subaward if determined appropriate under the circumstances by the Council's State Plan Committee; however, the ratings may be used to determine which subawards may require specific award conditions, closer supervision and/or more detailed monitoring strategies. The Council's State Plan Committee may also choose not to fund an award based upon the risk assessment if it determines that elevated risk will adversely affect the Council's ability to fulfill its duty as a steward of federal funds.

The Council's State Plan Committee will utilize the Risk Assessment ratings in addition to the score received from the scoring committee as part of the evaluation in its decision to fund the subaward. The State Plan Committee will review the risk assessment ratings for the top-scoring offeror and determine whether to fund the top-scoring proposal. If the top scoring proposal is not funded because the Risk Assessment has been determined to be too great by the Council's State Plan Committee or if negotiations with the top scoring offeror are unsuccessful, the proposal will no longer be considered, and the State Plan Committee may review the risk assessment ratings for the second highest scored proposal and determine whether or not to fund the proposal. This process will continue until a subaward is made, or until the State Plan Committee recommends otherwise. Please note that the State Plan Committee may use the prior performance ratings for proposers with a history of contracting with the Council as the deciding factor of an award based on specific experiences of compliance/non-compliance with Council guidelines.

The FDDC reserves the right to reject any or all proposals. No work shall begin until a contract is executed by the FDDC.

Project Contract Type: Fixed price based on review of deliverables that demonstrates a satisfactory level of performance.

Project Contract Period: All work shall be completed within 12 months of the contract execution date.

Background and Purpose of Proposal

Concerns with access to information about available services, access to services, and system coordination for continuity of services were recurring themes among focus groups, key informants, and survey respondents from the Comprehensive Review and Analysis (CRA) findings used to develop the Florida Developmental Disabilities Council's (FDDC) 2022-26 State Plan. A critical finding was that there is no useful, interactive clearinghouse to connect individuals and their families to services, supports, and programs. To address this need, the FDDC identified "Access to Services" as a critical priority area and developed a goal, objective, and activities to begin steps for addressing this priority area during the time span of the 2022-26 State Plan.

A Phase 1 project, Research for a Statewide Access to Services through Knowledge (ASK) Information System, was implemented by the National Association for the Dually Diagnosed (NADD) between 2022 and 2026. This project conducted significant research for the purposes of identifying community resources used by family members/caregivers of persons with I/DD, the ways they identify and share information, assist each other with information, refer people to useful resources, and utilize existing web-based platforms. One of the project strategies was to collect data from family members of persons with I/DD through online surveys and virtual and in-person interviews. Results showed that in their quest for information, most respondents (about 70.0 percent) said an internet search was the tool commonly used, followed by navigating directly to organizational websites (48.0 percent). (National Association for the Dually Diagnosed, 2023). A Phase 2 project, Access to Services through Knowledge: Translating Research into Application, was implemented by Mathematica, Inc. from 2024 through 2026. This project translated the research findings from the Phase 1 project into personas (i.e., avatars) and journey maps (i.e., roadmaps) that included scenarios, stories, and links to community resources to be populated into a forthcoming ASK Web-based Platform. The Phase 2 project's journey maps (i.e., roadmaps) and personas (i.e., avatars) addressed issues families/caregivers face throughout the lifespan in securing access to services, supports, and programs. To best address the needs of families, structures were also developed for integrating the personas (i.e., avatars) and journey maps (i.e., roadmaps) into sitemaps and content modules with a variety of tools to assist users in making decisions (e.g., decision aids, explainers, mind maps, and case studies) about key concerns.

The Florida Developmental Disabilities Council (FDDC) contracted with the North Central Florida Health Planning Council dba WellFlorida Council in 2024 to conduct a new CRA of statewide and national data regarding issues facing individuals with I/DD and their families/caregivers to plan for development of the FDDC 2027-31 State Plan. Primary sources that were used to gather information included focus groups, surveys, and key stakeholder interviews. Government reports, agency websites, and research articles served as secondary sources. Results indicated that families of persons with I/DD need a more coordinated and systematic way to find information, seek support, and obtain resources. Further, navigating complex systems to find resources and support services specific to the person with I/DD's life stage was found to be burdensome and required time, effort, and awareness that compounded barriers to service access (NADD, 2023). Beyond these findings, all seven information sources from the CRA (i.e., secondary data; self-advocate, caregiver/family member, agency leader focus groups; self-advocate and caregiver/family member surveys; and key informant interviews) identified "Access to Services, including a broad array of services and addressing barriers" as a key issue and theme. Subsequent ranking of priority issues by FDDC members placed "Access to Services" in the top three priority issue areas.

The concerns and needs identified for the priority area of "Access to Services" through the CRA led the FDDC to develop the following goal, objective, and activity for the 2027-2031 State Plan, which support work to be conducted under this IFP:

Goal 1: By September 30, 2031, individuals with intellectual and developmental disabilities (I/DD) and their families will have increased knowledge of, and expanded access to, comprehensive and

high-quality community resources, services, and supports across the lifespan.

Objective 1.1: By September 30, 2031, an Access to Services through Knowledge (ASK) web-based information and resource system will be established, utilized by family members statewide, and result in increased access for individuals with I/DD and their families to services and supports aligned with their diverse needs across the lifespan.

Key Activity 1.1.1: Identify and update or develop an interactive Access to Services through Knowledge (ASK) web-based platform of key community resources and tools for families through state-of-the-art technology in a user-friendly and accessible format.

Materials developed through the Phase 2 project will be used by the Phase 3 project this Invitation for Proposals (IFP) seeks to fund to develop and populate a web-based platform for use by families/caregivers. The combined outcome of the three phases of projects is expected to culminate in individuals with I/DD and their families having knowledge of and increased access to community resources and services across the lifespan.

Purpose:

This Access to Services through Knowledge (ASK) Web-based Platform IFP seeks to establish a Phase 3 project to identify and update or develop an interactive Access to Services through Knowledge (ASK) web-based platform of key community resources and tools for families through state-of-the-art technology in a user-friendly and accessible format. The scope of work will include 1) convening and facilitating an advisory committee; 2) identifying and confirming the modality for the ASK web-based platform; and 3) populating the existing platform or developing and populating the new platform with previously developed content modules, including all supplemental materials and resources.

To date, 40 content modules have been developed covering major life areas, including: early intervention, education, decision-making supports, asset management / financial planning, employment and volunteering, social connection, supports and services, behavioral health, and diagnosis. Content is organized into module types. These include the following types of content:

- **Explainers:** Break down complex topics into plain language
- **Decision Aids:** Help families compare options and think through what may fit their situation
- **Roadmaps:** Show step-by-step processes for navigating systems or transitions
- **Mindmaps:** Help users explore flexible or non-linear options
- **Case Study Stories:** Show realistic caregiver experiences across systems and life stages.

This content is designed to answer common questions and problems that were documented in the Phase 1 research. The focus of the web-based platform is to go beyond simply listing resources, since the research has indicated that families often don't know what resources they are searching for. They will come to the tool expressing a need. The tool must be designed to help them explore their specific situation with their family member and determine more clearly what their needs are and what resources are available to help them. Further, it is conceptualized to be a tool that families can return to as their loved one progresses through all the life stages to get immediate assistance and to plan for the future.

Sample content from the Phase 2 project that will be used for populating the web-based platform is included within this IFP in Appendix A on Pages 21–27. Full content for populating the web-based platform will be shared with the selected provider upon successful contract execution.

The FDDC is seeking entities to apply who meet the following qualifications and can demonstrate the ability to fulfill the scope of work outlined in this proposal.

Preferred Qualifications:

Have relevant experience in:

1. Designing and building web-based platforms or content databases intended for organizations with a public facing or community audience that integrate combined written content (like stories, profiles, or guides) with searchable, navigable structure. Must provide a sample of a completed project comparable in scope, budget, and complexity to the work described in this IFP.
2. Integrating artificial intelligence (AI)-supported search, chat, or content navigation features into platforms used by non-technical end users and demonstrate awareness of the special care needed when AI serves potentially vulnerable end users seeking services.
3. Producing digital products that conform to Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.1 or 2.2, Level AA, and accessibility testing methods.
4. Developing digital products that can be maintained as content evolves and include a credible plan for testing, measurement, and continuous improvement.
5. Project management with diverse audience collaboration.
6. Working with organizations serving individuals with disabilities and/or their family members.

Scope of Work and Services to be Provided:

Identify and update or develop an interactive Access to Services through Knowledge (ASK) web-based platform of key community resources and tools for families through state-of-the-art technology in a user-friendly and accessible format.

1. Prepare for and participate in a minimum of 4 virtual Advisory Committee meetings to share information on planned work and seek input from Advisory Committee members.
 - a. Prepare and present materials (e.g., PowerPoints, handouts) at each virtual Advisory Committee meeting planned and facilitated by Council staff.
2. Identify and confirm the modality for the development of the ASK web-based platform (i.e., use of an existing platform or development of a new platform).*
 - a. Provide a technology review and analysis outcome report that includes, but is not limited to, all elements of selecting the new or using an existing web-based platform to minimally include pros and cons (e.g., functionality, scalability, security, cost, intuitiveness for users) for all platforms reviewed.
 - b. Present the technology review and analysis outcome report to the Advisory Committee to obtain buy-in and support for the web-based platform selected.

** Identification and confirmation of the modality for the ASK web-based platform must be completed within 90 days of contract execution.*
3. Populate the existing platform or develop the new web-based platform for housing previously developed content modules, including all supplemental materials and resources.*
 - a. Ensure the platform meets federal accessibility standards (Section 508 and WCAG 2.1/2.2, Level AA) and accessibility testing methods.
 - b. Ensure the platform is developed in a manner that allows for scalability and maintenance as content evolves and includes a credible plan for testing, measurement, and continuous improvement.

- c. Integrate ASK content modules within a searchable, navigable structure.
- d. Integrate artificial intelligence (AI)-supported search, chat, or content navigation features into the platform that are suitable for potentially vulnerable families seeking services for individuals with I/DD.
- e. Implement user testing with a minimum of one small group of family members of individuals with I/DD.
- f. Submit monthly project progress reports that will provide FDDC with detailed project progress, including the wireframe or prototype design of the responsive and intuitive web-based platform. At a minimum, the report shall include project deliverable status indicators (e.g., in progress, completed, idle), and any other indicator(s) deemed necessary by the proposer.
- g. Submit a final comprehensive report that includes all mapping and integrated capabilities of the web-based platform in a format that is user-friendly and easily transferrable into an End User manual.

**The ASK web-based platform and user testing must be completed prior to September 30, 2027.*

4. Fulfill Council programmatic requirements as follows:

- a. Complete and submit monthly deliverables to include the following:
 - i. An updated work plan.
 - ii. Monthly project progress reports that will provide FDDC with detailed project progress, including the wireframe or prototype design of the responsive and intuitive web-based platform. At a minimum, the report shall include project deliverable status indicators (e.g., in progress, completed, idle), and any other indicator(s) deemed necessary by the proposer.
- b. Participate in regularly scheduled meetings with program staff.
- c. Complete and submit a final comprehensive report, establishing all mapping and integrated capabilities of the web-based platform, in a format that is user-friendly and easily transferrable into an End User manual.
- d. Complete and submit an Executive Summary that provides all components set forth in the contract (e.g., overview of major activities, outputs, outcomes, summary and analysis of data, recommendations for future action).

Sections for Offeror to Complete

Section 1: Describe the organizational capacity of the offeror to meet the specified qualifications, address the need/purpose of this project, and complete the scope of work and services to be provided as described on Pages 3–6 of this Invitation for Proposal.

The offeror must complete the Access to Services through Knowledge (ASK) Web-based Platform Work Plan Template, provided as a separate, editable document, and available on the Council’s website at <https://www.fddc.org/ifp-2026-as-9400-access-to-services-through-knowledge-ask-web-based-platform/> to describe their unique plans for implementing the scope of work, time frames for completing the scope of work, and staff and/or providers who will perform the scope of work.

As prescribed by the Council’s Invitation for Proposal Protocol, a sample of work must be provided and evaluated for projects with a primary end purpose of a written product(s). Attach a current sample of work, preferably aligned with the scope of work to be provided in this project.

Section 2: Provide the name of key staff who will work on the project, including educational background, length of time with the organization, and current title. Attach current resume or curriculum vita (CV) of each team member to be involved in the project.

Section 3: Provide an all-inclusive cost to conduct work and a brief budget narrative based upon the format on Page 9 using the separate, editable Budget Request Template available on the Council’s website at <https://www.fddc.org/ifp-2026-as-9400-access-to-services-through-knowledge-ask-web-based-platform/>. Indirect cost cannot exceed 15 percent (15%) de minimus rate of total direct costs (MTDC) unless the entity has an approved federally recognized negotiated indirect cost rate in accordance with the Code of Federal Regulations (CFR) § 200.332, Section 4 Uniform Guidance.

Calculate total hours to complete work and provide an hourly rate and total of hours for each team member involved. The budget narrative should explain and demonstrate that each entry on the line-item budget is allowable, reasonable, and necessary. **The funds requested from FDDC must remain within the identified range of available funding.** The budget and budget narrative must present a cost-effective funding level for achieving the purpose of the project. **Costs must be in accordance with 2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements of Federal Awards (Uniform Guidance)** <https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-E>.

All proposed budget items and amounts are subject to final approval.

Section 4: Provide references based upon the format on Pages 10–11 using the separate, editable References Template available on the Council’s website at <https://www.fddc.org/ifp-2026-as-9400-access-to-services-through-knowledge-ask-web-based-platform/>. Each proposal may contain up to seven (7) references who can be contacted to obtain a recommendation concerning the offeror’s performance in providing services similar to those required by this IFP. References must be based upon work done within the last five (5) years. **At a minimum, two (2) references will be contacted.**

Council members or Council staff must not be used as references. Additionally, prior performance assessments for offerors who have a history of contracting with the FDDC must not be used as references.

Section 5: Provide completed required Forms 1–6 by uploading electronically signed, dated, and scanned Portable Document Format (PDF) files at the specific Dropbox link.

Format for Submission

Offeror shall submit a written narrative answering each section in the “Sections for Offeror to Complete” (all five sections must be completed with section headings in the order listed above). Use a 12-point Arial font size, 1.5 space, and limit your response to 10 numbered pages, not including the Work Plan Template, Budget Request Template, References Template, resumes, curriculum vitae, and required forms. The Work Plan Template response must not exceed 20 numbered pages. Attachments beyond the Work Plan Template, Budget Template with narrative, References Template, and required forms identified in Section 5 will only be used to support the IFP requirements.

All submissions must be in Portable Document Format (PDF) files.

All submissions must be marked with the Invitation for Proposal #2026-AS-9400.

Proposals shall be electronically submitted via FDDC’s Dropbox at <https://www.dropbox.com/request/g3asb5ldhx950kw7rs9n>

Due Date: All submissions must be received by 4:00 p.m. (EDT) on July 9, 2026. Please allow enough time to upload your proposal into the FDDC’s Dropbox. Depending on the size of the proposal, it may take additional time to upload. Any proposals received after the date and time set forth above will be considered unresponsive and will not be considered by FDDC.

Submit proposal to: Florida Developmental Disabilities Council, Inc.
<https://www.dropbox.com/request/g3asb5ldhx950kw7rs9n>

BUDGET REQUEST FORMAT

BUDGET ITEM <i>Line items may be added or deleted based on anticipated costs.</i>	FDDC REQUESTED FUNDS	BUDGET NARRATIVE
Salary		
Fringe		
Technology and Software		
Artificial Intelligence (AI) Development Costs		
Internal Quality Assurance (QA) Testing		
Accessibility Testing		
Indirect Costs (limited to 15% of MTDC, *unless the organization has a federally recognized negotiated indirect cost rate)		
Other: Describe any other budget items listed.		
TOTAL	\$	

REFERENCES FORMAT

Offerors are required to submit **up to** seven (7) references who can be contacted to obtain a recommendation concerning the offeror's performance in providing services similar to those required by this IFP. References must be based upon work done within the last five (5) years. At a minimum, two (2) references will be contacted.

Offerors who have a history of contracting with the FDDC are instructed to not list the FDDC (including current Council members or staff) as a reference.

- 1) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

- 2) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

- 3) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

- 4) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

- 5) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

6) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

7) Name of Company or Agency:
Contact Person:
Address:
Phone Number:
Email Address:
Project or service name or identifier:
Approximate dates work was undertaken/completed:

Mandatory Terms and Conditions for Procurement

1. **Offeror Information:** Completed information and authorized signature required on Form #1.
2. **Certification of Disbarment and Suspension:** Authorized signature required on Form #2.
3. **Conflict of Interest:** Authorized signature required on Form #3.
4. **Cone of Silence:** Authorized signature required on Form #4.
5. **Indemnification and Hold Harmless:** Authorized signature required on Form #5.
6. **Self-Assessment of Risk:** Completed self-assessment with authorized signature required on Form #6.
7. **Termination:**
 - a. Termination at Will.

This contract may be terminated, without cause, by either party upon no less than thirty (30) calendar days notice, in writing, unless a lesser time is mutually agreed upon by both parties. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery.
 - b. Termination Because of Lack of Funds.

In the event funds to finance this contract become unavailable, the Council may terminate the contract upon no less than twenty-four (24) hours notice, in writing, to the Provider. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. The Council shall be the final authority as to the availability of funds.
 - c. Termination for Breach.

This contract may be terminated by the Council for non-performance by the Provider upon no less than twenty-four (24) hours notice, in writing, to the Provider. Said notice shall be delivered by certified mail, return receipt requested, or in person with proof of delivery. Waiver of breach of any provisions of this contract shall not be deemed to be a waiver of any other breach and shall not be construed to be a modification of the terms of this contract. The provisions herein do not limit the Council's right to remedies at law or in equity, or to damages.
8. **Records and Documentation:**
 - a. The provider shall keep and maintain public records required by public records laws for a minimum of three (3) years following the end date of the contract.
 - b. Upon request from the Council, the provider will provide a copy of the requested records or allow the records to be inspected or copied within a reasonable time, at a cost that does not exceed the guidelines of Chapter 119, Florida Statutes.
 - c. The provider shall ensure the public records that are exempt or confidential and exempt from public record disclosure requirements are not disclosed, except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the Council.
 - d. The provider shall not use or disclose any information concerning a recipient of services under this contract for any purpose not in conformity with state regulations and federal law or regulations (45 CFR s. 205.50), except upon written consent of the recipient, or the responsible parent or guardian when authorized by law.
 - e. The provider is responsible for maintaining documentation of all tasks and deliverables under this contract. Records and documentation of events sponsored under this contract include, but are not limited to, the agendas, meeting minutes, conference calls, Best Practices Manual, brochures, handouts, sign-in sheets, evaluations, survey reports, and documentation of printed materials.
 - f. The provider agrees to retain all records of individuals receiving services, financial records, supporting documents, statistical records, and any other documents (including electronic storage

media) pertinent to this contract for a period of three (3) years after termination of the contract, or if any audit has been initiated and audit findings have not been resolved at the end of three (3) years, the records shall be retained until resolution of the audit findings. The provider will cooperate with the Council to facilitate the duplication and transfer of any said records or documents during the required retention period.

- g. Upon completion of the contract, the provider may transfer, at no cost, to the Council all public records in possession of the provider or keep and maintain public records required by the public agency to perform the service. If the provider transfers all public records to the Council upon completion of the contract, the provider shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the provider keeps and maintains public records upon completion of the contract, the provider shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the Council's custodian of public records, in a format that is compatible with the information technology systems of the Council. §119.0701(2), F.S.

9. Nondiscrimination Policy:

- a. All contractors who are the recipients of FDDC's funds or who propose to perform any work or furnish any goods under agreements with FDDC, shall agree to these important principles:
 - i. Contractors will not discriminate against any employee or applicant for employment because of race, religion, color, sexual orientation, or national origin, except where religion, sex, or national origin is a bona fide occupational qualification reasonably necessary to the normal operation of the contractors.
 - ii. Contractors agree to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for meeting the intent of this section.

10. Trafficking Victims Protection Act (TPVA) of 2000, as amended (22 U.S.C.7104): Provider will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits contractor/consultant from (1) engaging in severe forms of trafficking in persons during the period of time that this agreement is in effect; (2) procuring a commercial sex act during the period of time that this agreement is in effect; or (3) using forced labor in the performance of the contracted services under this agreement.

11. Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms: Provider will comply with the requirements of 2 CFR 200.321 to take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

FORM #1

OFFEROR INFORMATION

OFFEROR NAME:	
ADDRESS (including city, state, and zip code):	
PHONE NUMBER:	
CONTACT PERSON'S NAME:	
CONTACT PERSON'S TITLE:	
CONTACT PERSON'S EMAIL ADDRESS:	
NAME, ADDRESS, TELEPHONE NUMBER, AND EMAIL ADDRESS OF THE REPRESENTATIVE OF THE PERSON WHO WILL BE RESPONSIBLE FOR ADMINISTRATION OF THE PROGRAM(S) IF FUNDED:	
NAME, ADDRESS AND TELEPHONE NUMBER OF THE REPRESENTATIVE OF WHERE THE PROVIDER'S FINANCIAL AND ADMINISTRATIVE RECORDS WILL BE MAINTAINED IF FUNDED:	
TAX IDENTIFICATION NUMBER (TIN):	
SAM.GOV REGISTRATION STATUS (CHECK ONE):	<input type="checkbox"/> ACTIVE REGISTRATION <input type="checkbox"/> DATE REGISTRATION SUBMITTED _____

FDDC Federal Grantee Registration Requirements – FDDC is the state designated agency to receive federal funds under a formula-based grant per P.L. 106-402 (Developmental Disabilities Act) from the U.S. Department of Health & Human Services, Administration for Community Living. To that end, entities receiving or applying for federal awards must meet certain registration requirements. Entities are defined by SAM.gov to include individuals, businesses, organizations, state governments, local governments, tribal governments, and foreign governments.

The following registration requirements must be met:

1. Have a Tax identification number, and
2. Register at System for Award Management – www.SAM.gov prior to submitting an application for funding and update registration annually.

By signing this certification as an authorized official of the below-referenced offeror, we hereby certify that we have registered with the System for Award Management (SAM) or that our registration is pending.

OFFEROR NAME: _____

AUTHORIZED SIGNATURE: _____

PRINTED NAME: _____

DATE: _____

FORM #2

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER
RESPONSIBILITY MATTERS**

This certification is required by the regulations (2 CFR Part 200, Appendix (II)(H)) implementing Executive Order 12549 and 12689, 2 CFR part 180, Section 180.355.

As the duly authorized representative of the offeror, I certify, to the best of my knowledge and belief, that neither the offeror nor its principals:

- 1) Is presently excluded or disqualified;
- 2) Have been convicted within the preceding three years of any of the offenses listed in s.180.800(s) or had a civil judgment rendered against it for one of those offenses within the time period;
- 3) Is presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission or any of the offenses listed in s.180.800(s); or
- 4) Has had one or more public transactions (Federal, State, or local) terminated within the preceding three years for cause or default.

OFFEROR NAME: _____

AUTHORIZED SIGNATURE: _____

PRINTED NAME: _____

TITLE: _____

ADDRESS: _____

PHONE: _____

E-MAIL: _____

DATE: _____

FORM #3

CONFLICT OF INTEREST DISCLOSURE FORM

For purposes of determining any possible conflict of interest, all offerors must disclose if any FDDC employee, appointed official, or if any of its agencies is also an owner, corporate officer, agency, or employee of their business.

Indicate either “yes” (a FDDC employee, appointed official, or agency is also associated with your business), or “no.”

YES _____

NO _____

If yes, give person(s) name(s) and position(s) with your business.

NAME(S)

POSITION(S)

OFFEROR NAME: _____

AUTHORIZED SIGNATURE: _____

PRINTED NAME: _____

TITLE: _____

ADDRESS: _____

PHONE: _____

E-MAIL: _____

DATE: _____

FORM #4

CONE OF SILENCE CLAUSE

FDDC has established a solicitation silence policy for this procurement (**Cone of Silence Clause**) that prohibits oral and written communication regarding all formal solicitations for goods and services (formal bids, Request for Proposals, Invitation for Proposals, Requests for Qualifications, Invitation to Quote, Invitation to Negotiate) issued by the FDDC through its staff.

The period commences upon receipt of the procurement proposal, by FDDC, and terminates upon FDDC's approval to award a contract or reject all responses.

When the solicitation silence period is in effect, no oral or written communication is allowed regarding the solicitation between prospective respondents and members of the FDDC, the Executive Director, employees or members of the FDDC Approved Review Committee. All questions or requests for information regarding the solicitation **MUST** be directed to the designated Representative listed in the solicitation.

Any information thought to affect the committee or staff recommendation submitted after bids/proposals are due should be directed to the Executive Director or an appointed representative. It shall be the Executive Director's decision whether to consider this information in the decision process.

Any violation of this policy shall be grounds to disqualify the respondent from consideration during the selection process.

All respondents must agree to comply with this policy by signing the following statement and including it with their submittal.

By signing this certification as an authorized official of the below-referenced offeror, we hereby agree to abide by the FDDC Cone of Silence Clause and understand that violation of such shall result in disqualification of the proposal.

AUTHORIZED SIGNATURE: _____

PRINTED NAME: _____

TITLE: _____

OFFEROR NAME: _____

DATE: _____

FORM #5

INDEMNIFICATION AND HOLD HARMLESS

Offeror shall indemnify and hold harmless FDDC, its officers and employees from liabilities, damages, losses, and costs, including but not limited to attorney fees, to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the Offeror and other persons employed or utilized by the Offeror in the performance of this Agreement.

OFFEROR NAME: _____

AUTHORIZED SIGNATURE: _____

PRINTED NAME: _____

TITLE: _____

ADDRESS: _____

PHONE: _____

E-MAIL: _____

DATE: _____

FORM #6
SELF-ASSESSMENT OF RISK
PURPOSE AND BACKGROUND

The purpose of the Self-Assessment is to obtain an understanding of your organization’s capacity to adequately document, record, track, and report expenditures of federal funds as well as evaluate your organization’s risk of noncompliance with federal statutes, regulations, and the terms and conditions of the resulting subaward. The assessment of risk is a requirement for use of our federal funds.

During the funding process, each submitted proposal will be reviewed and scored according to the criteria set forth in the Invitation for Proposals. The Council will then undertake a risk review of the offeror for each proposal scoring over a 70. This review will consist of three components: (1) a self-assessment of risk completed by the applicant; (2) inherent risk assessment; and (3) an assessment of prior performance if the offeror has previously contracted with the Council.

Based upon the following scale, an offeror will receive a rating of LOW, MODERATE, or HIGH for each applicable component. Please note that a rating of HIGH risk does not preclude the offeror from receiving the subaward. The Council’s State Plan Committee will utilize the Risk Assessment ratings in its decision to fund the subaward.

Score	Rating	Assessment
0-3	HIGH	Requires intensive follow-up and may require action plan to address identified risks. Specific follow-up requirements will vary but may include contract conditions such as providing additional or more detailed financial and project reports; establishing additional prior approvals; or undergoing specific technical assistance. An action plan may be required to address specific areas of identified risk.
4-6	MODERATE	May need improvement or technical assistance to improve identified risks. Specific follow-up requirements for improvement will vary but may include contract conditions such as periodically providing detailed financial and project reports; establishing prior approvals; or undergoing specific technical assistance.
7-12	LOW	Indicates offeror’s internal controls likely to reduce non-compliance or fraud. Requirements typically include standard contract conditions for providing detailed financial and project reports; prior approvals; or technical assistance.

FORM #6
SELF-ASSESSMENT OF RISK

INSTRUCTIONS: Each offeror MUST COMPLETE the following self-assessment questions and sign/date the form.

1	Does your organization have experience managing state or federal funds?	YES	NO
2	Is the amount of the proposed funding less than 50% of your average revenues for the last 24 months?	YES	NO
3	Does your organization have the capacity to operate on a cost reimbursement basis?	YES	NO
4	Is it a correct statement that your organization has not experienced a significant change in personnel or accounting systems within the past 12 months?	YES	NO
5	Does your organization have an annual audit?	YES	NO
6	Is it a correct statement that your organization is not under a corrective action plan as a result of audit or monitoring findings?	YES	NO
7	Is it a correct statement that your organization is not involved in active lawsuits or has not been made aware of any potential lawsuits?	YES	NO
8	Does your organization have a history of submitting timely deliverables?	YES	NO
9	Does your organization have a history of submitting timely and accurate fiscal reports?	YES	NO
10	Does your organization have an accounting system that will track receipts and expenditures by grant/contract?	YES	NO
11	Does your organization have the ability to record and track staff time incurred by project?	YES	NO
12	Does your organization have written policies and procedures for procurement, personnel, property, and subcontracts (if applicable)?	YES	NO

To calculate your total score, count 1 point for each “Yes” response.

Total = _____ /12

I have made a good faith effort to complete this Self-Assessment form. The information provided is correct, current, and complete to the best of my ability. I understand that any false or misleading responses are grounds for dismissal of this proposal, termination of the resulting subaward, and possible restrictions on future awards. I certify that my organization is currently not suspended or disbarred from doing business with the federal government.

Offeror Name

Signature of Authorized Representative of Offeror

Date

Printed Name and Title

Appendix A

Access to Services through Knowledge (ASK) Sample Content

The selected proposer will be provided with all content modules referenced on page 4 that have been developed and approved through September 30, 2026, upon successful contract execution.

Below and included on pages 22–27 are **sample** mockups of the website navigation for the Asset Management domain plus sample content modules designed to help caregivers and families learn about managing and protecting assets while maintaining eligibility for important benefits. This is one topic or domain that will be included in the planned structure of the website. Different domains have different numbers of content modules depending on the complexity of the information.

- **Example of How to Navigate Website (p. 22)**
This page includes an example of a potential layout the web platform. It includes an example of a site map (#4) for the Assets Management domain. The site map organizes the 5 types of content modules (i.e., case study, decision aid, explainer, road map, mind maps). In this example, the site map shows links to a case study, which is linked to decision aids. The decision aids link out to explainers with more information about different assets and information. Linked resources (#5) will include links out to state or national resources. This domain is used in all the examples below.
- **Example Website Landing Page (p. 23)**
This is a mockup of a landing page that gives the user the option to navigate the site by topic (i.e., domain), family stories (i.e., case studies) or life stage. The arrow indicates the selected items on subsequent pages align to those elements for the Assets Management domain. Other options include relevant Family Stories or navigating the Information by Life Stage.
- **Example of How to Navigate Website by Topic (p. 24)**
This example shows how the landing page for the topic (or Domain) for Assets Management might look. It provides options for money management as well as long-term financial planning. The arrow indicates this series of examples will link to a decision aid for “Deciding how to protect your family’s long-term financial well-being.” It also includes a link to relevant family stories.
- **Example of Decision Aid – Condensed (p. 25)**
This example of a decision aid for Financial and Estate Planning shows the different resources accordion collapsed with just the names of different types of resources (i.e., Special Needs Trust, ABLE account, Wills, Beneficiary designations). It also includes tips from families in the ASK research studies for transferring assets and text for when to create or update your financial or estate plan. Finally, it includes more information linking out to other resources for assistance.
- **Example of Decision Aid – Expanded (p. 26)**
This is the same decision aid as on the previous page, but with the resources accordion drop-down lists expanded.
- **Example explainer (p. 27)**
This page depicts an explainer for special needs trusts. It includes call-out boxes for a quick review and tips for families gleaned from the ASK research.

Example of how to navigate website

1 TITLE

ASK RESOURCE HUB
Trusted information and tools to help individuals with I/DD and their families make informed decisions across the lifespan.

2 LANDING PAGE

Multiple ways for users to find the information they need.

EXPLORE BY TOPIC

Find information and tools organized by life domains.

[Browse Topics](#)

EXPLORE BY LIFE STAGE

Find what you need based on where you are in your journey.

[View Life Stages](#)

EXPLORE BY FAMILY STORY

Learn from real families and see how they made decisions.

[View Family Stories](#)

3 TOPIC TRANSITION PAGE

Browse all life domains to choose a topic area of focus.

EXPLORE TOPICS (LIFE DOMAINS)

Diagnosis & Early Support

Education

Employment & Volunteering

Asset Management

Health Insurance

Housing

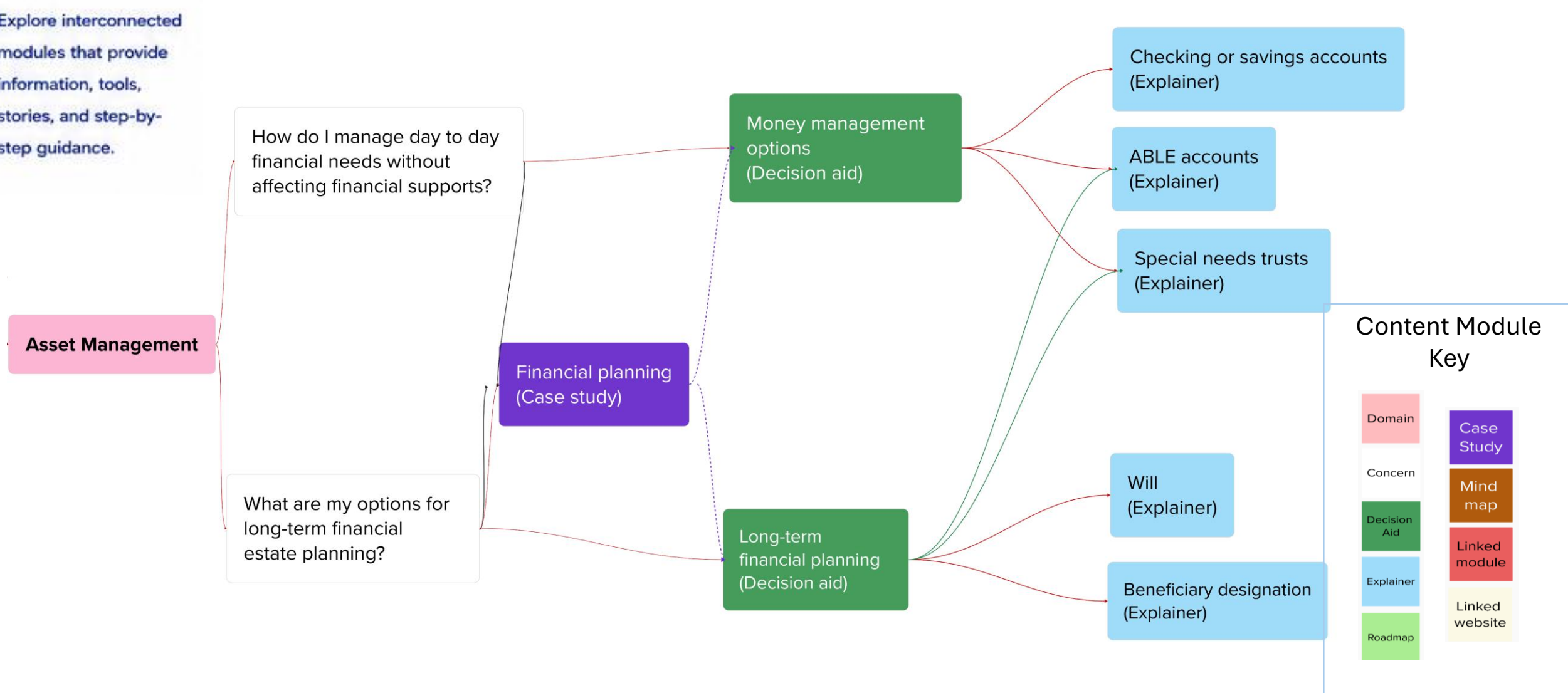
Legal & Decision Making Supports

Services & Supports

Social & Community Inclusion

4 CONTENT MODULES WITHIN THIS TOPIC

Explore interconnected modules that provide information, tools, stories, and step-by-step guidance.



5 LINKED RESOURCES

Curated resources and organizations to support you.

Linked Resources (embedded throughout modules)

<p>State Agencies & Programs</p> <ul style="list-style-type: none"> • APD • AHCA (Medicaid) • Florida Housing.org • DCF • Local Housing Authorities 	<p>Waivers & Services</p> <ul style="list-style-type: none"> • iBudget Waiver • Statewide Waiver Programs • Medicaid State Plan Services 	<p>Housing & Subsidies</p> <ul style="list-style-type: none"> • HUD (Section 8) • Public Housing • LIHTC Properties • Housing Choice Vouchers 	<p>Provider Directories</p> <ul style="list-style-type: none"> • APD Provider Search • Waiver Providers • Group Homes • Assisted Living Facilities 	<p>Health & Support Services</p> <ul style="list-style-type: none"> • Medicaid Managed Care Plans • Therapies • Behavioral Health Providers
<p>Legal & Advocacy</p> <ul style="list-style-type: none"> • Legal Aid • Disability Rights Florida • Advocacy Organizations 	<p>Caregiver Support</p> <ul style="list-style-type: none"> • Family Support Organizations • Respite Resources • Caregiver Training 	<p>Financial Resources</p> <ul style="list-style-type: none"> • Benefits Planning Resources • SSI/SSDI Info • Financial Aid Applications 	<p>National Resources</p> <ul style="list-style-type: none"> • ACL (Aging & Disability) • Autism Speaks • The Arc • NAMI 	

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Example Website Landing Page

Welcome to the ASK Resource Hub

An initiative of the [Florida Developmental Disabilities Council](#)



The Access to Services through Knowledge Resource Hub is a unified collection of resources for individuals with developmental disabilities and families building a network of support.

Information by Topic

Select a topic below to explore the associated resources.

 Diagnosis Learn how to recognize developmental delays, get an evaluation, and connect to early intervention services.	 Asset Management Learn how to manage and protect assets while maintaining eligibility for important benefits and supports	 Employment Learn about job training, vocational rehabilitation, and employment opportunities for people with I/DD
 Financial Understand available financial benefits and programs that help cover daily and long-term needs	 Health Insurance Compare insurance and waiver options to learn how coverage addresses your family's healthcare needs	 Housing Discover living options from independent to supported settings and what services are available in each
 Legal Learn about guardianship, supported decision-making, and long-term planning for your loved one's future	 Services and Supports Find information about behavioral health services, long-term care services and other supports	 Social Connection Find ways to build peer connections, family support networks, and inclusive community relationships

Family Stories

Use the links below to explore stories of other families and caregivers of people with I/DD.

 Helena and Thom Helena is helping her son Thom prepare for high school and encouraging him to build social skills and connections as he grows.	 John, Brittany, and Luna After their toddler Luna's recent I/DD diagnosis, John and Brittany are learning about Early Steps and community supports to help her development.
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[Explore more family stories](#)



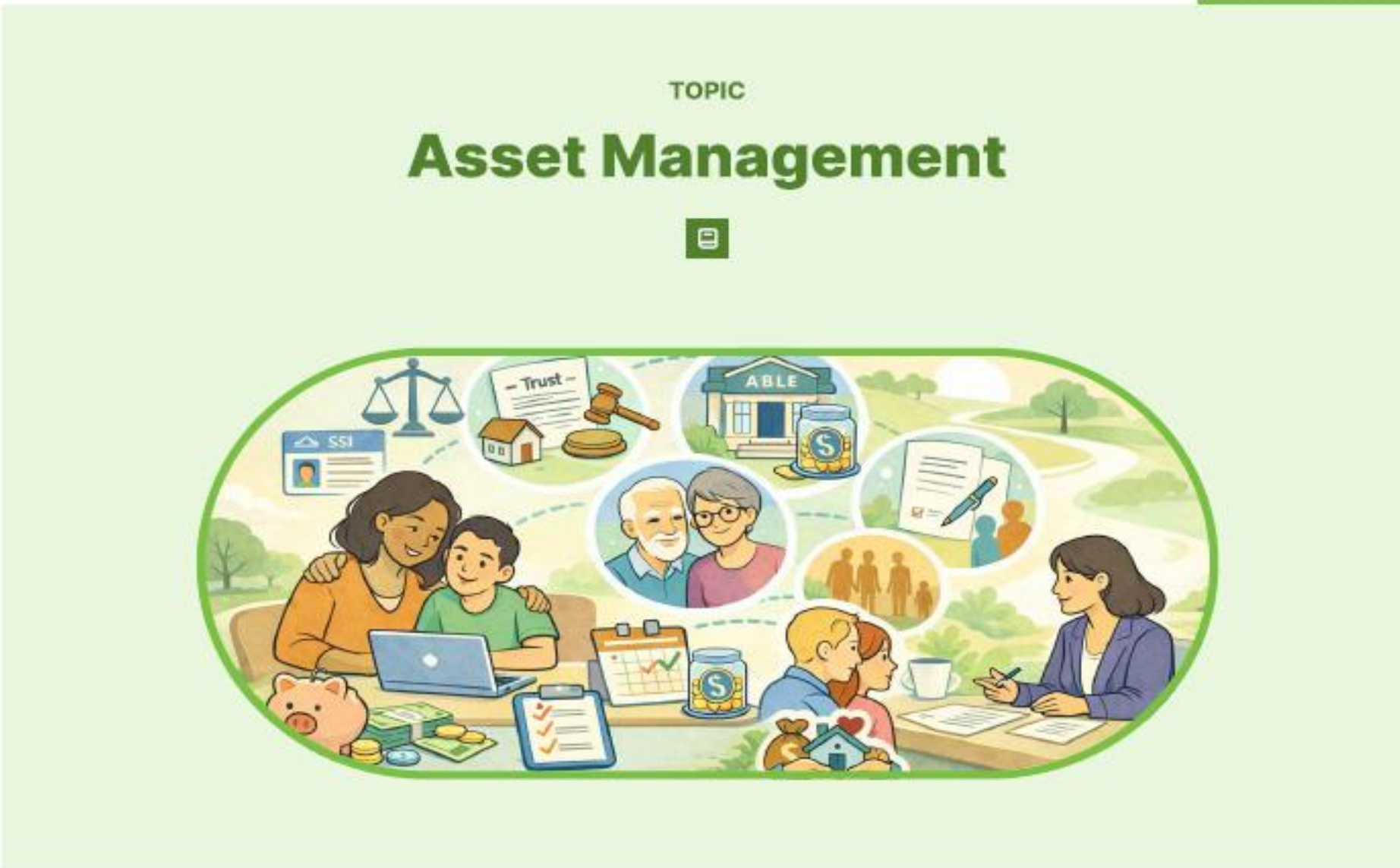
Information by Life Stage

Prefer to explore by life stage? Select one below to find resources that relate to it.

Early Childhood 0-5 years old	Childhood 6-12 years old	Teens and Young Adults 13-25 years old	Adults 26-49 years old	Older Adults 50+ years old
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Example of how to navigate website by TOPIC



Families often start looking for asset management information when they apply for benefits with asset limits, like SSI or Medicaid, and want to understand how to save or plan without putting eligibility at risk. You might be ready to think ahead about how to protect your child's benefits, plan for the future, or manage money after a major life change. Explore options like everyday banking, ABLE accounts, special needs trusts, and estate planning tools that can help protect benefits while supporting your family's long-term goals.

Use the links below to explore specific topics within Asset Management.

Money management options


- [Checking or savings accounts](#) →
- [Able Accounts](#) →
- [Special needs trusts](#) →

Long-term financial planning

- [Deciding how to protect your family's long-term financial well-being](#) →
- [Wills](#) →
- [Designating a beneficiary](#) →

Family Stories

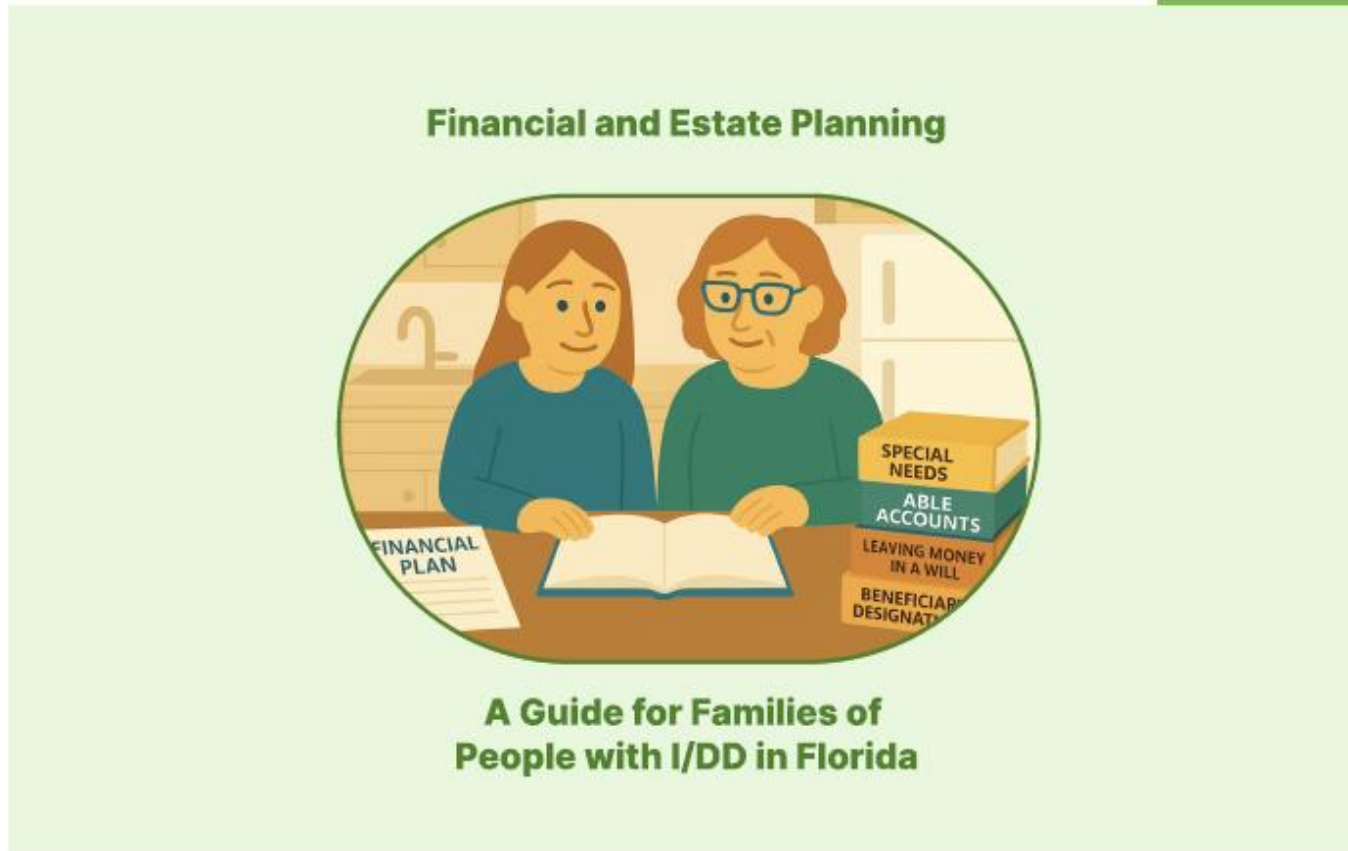
Use the links below to explore stories of other families and caregivers of people with I/DD who have navigated asset management related challenges



Dakota, Grant, and Daniel

Dakota and Grant are the parents of 17-year-old Daniel. Daniel has Level 3 Autism Spectrum Disorder, meaning he needs significant help with communication and daily living skills. As Daniel approached his 18th birthday, Dakota and Grant were faced with a big decision. In Florida, turning 18 means Daniel would be considered a legal adult, with the right to make his own decisions about things like medical care, education, money, and housing.

← [Back to all topics](#)



Why planning matters

If your family plans to leave money or property to a loved one with a disability, it's important to plan carefully. Many people with intellectual or developmental disabilities (I/DD) need lifelong support for health care, housing, and daily living. A good financial plan helps make sure your loved one continues to get the care they need—even after you're no longer able to help.

Without the right protections, giving your loved one money through an inheritance, life insurance, or a financial gift could accidentally cause them to lose important benefits like SSI (Supplemental Security Income) or Medicaid. These programs have strict limits on how much money or property a person can have.

Planning tools that can help

There are a number of financial or estate planning tools that you can use to transfer money or assets while protecting the person's eligibility for benefits like SSI or Medicaid. Use the chart below to explore what may be right for you and your family.

Click an option below to see more details.

COLLAPSE ALL

Special Needs Trust (SNT)

A legal arrangement that holds money for your family member without affecting their eligibility for government benefits. The trust can pay for things your loved one needs, like medical expenses, education, or recreation.

ABLE account

A special savings account for people with disabilities. Money in an ABLE account can be used for qualified expenses like housing, health care, or transportation. It doesn't count against SSI or Medicaid asset limits (up to a certain amount).

Wills

Your will explains how you want your property or money to be handled after your death. It's an important part of any estate plan.

Beneficiary designations

When you open a life insurance policy, retirement account, or bank account, you can name who should receive the money after you pass away.

Tips for transferring assets

- Use a combination of financial tools: Many families use both a Special Needs Trust and an ABLE account to meet different needs.
- Don't name your loved one directly as a beneficiary unless it's through an ABLE account or a trust.
- Work with a lawyer or financial planner who has experience with disability-related planning.
- Review your will and accounts regularly to make sure they still meet your family's needs.

When to create or update your financial or estate plan

Life changes—and your financial plan should change with it. Here are some important times to review or update your documents:

- When your loved one is diagnosed with a disability
- When your family goes through a major change (such as a move, divorce, marriage, or new diagnosis)
- When your loved one turns 18 and becomes a legal adult
- When your family gains or loses assets (such as inheriting property or selling a home)

Even if you already have a plan, review it every few years to make sure it still fits your wishes and your family's needs.

For more information

If you're thinking about long-term planning and aren't sure whether a **Special Needs Trust**, **ABLE account**, or other financial planning tool is the right fit, it's worth speaking with a **lawyer** or a **financial planner** who has experience with financial and estate planning for people with disabilities and their families. They can help you understand how specific policies, like Florida's Medicaid recovery system, can affect money put into the trust.

Check out [this guidance from the Arc Center for Future Planning](#) on choosing the right lawyer or [this guidance from Arc Minnesota](#) on choosing a financial planner. You can search for Florida lawyers and financial planners on the Arc Center for Future Planning's resource directory, or you can find more options on the [Special Needs Alliance's list of Florida lawyers](#) or the [Florida Bar's Elder Law Section](#).

Example Decision Aid - Expanded

Financial and Estate Planning



A Guide for Families of People with I/DD in Florida

Why planning matters

If your family plans to leave money or property to a loved one with a disability, it's important to plan carefully. Many people with intellectual or developmental disabilities (I/DD) need lifelong support for health care, housing, and daily living. A good financial plan helps make sure your loved one continues to get the care they need—even after you're no longer able to help.

Without the right protections, giving your loved one money through an inheritance, life insurance, or a financial gift could accidentally cause them to lose important benefits like SSI (Supplemental Security Income) or Medicaid. These programs have strict limits on how much money or property a person can have.

Planning tools that can help

There are a number of financial or estate planning tools that you can use to transfer money or assets while protecting the person's eligibility for benefits like SSI or Medicaid. Use the chart below to explore what may be right for you and your family.

Click an option below to see more details.

COLLAPSE ALL

Special Needs Trust (SNT)

A legal arrangement that holds money for your family member without affecting their eligibility for government benefits. The trust can pay for things your loved one needs, like medical expenses, education, or recreation.

How it works

A legal trust holds assets for the person's benefit without counting against SSI/Medicaid limits. Managed by a trustee.

Pros

- Can hold unlimited assets
- Doesn't affect benefits
- Funds can be used for many disability-related expenses

Things to watch out for

- Must follow strict legal rules
- Can be expensive to set up and manage
- Requires choosing a reliable trustee

LEARN MORE

ABLE account

A special savings account for people with disabilities. Money in an ABLE account can be used for qualified expenses like housing, health care, or transportation. It doesn't count against SSI or Medicaid asset limits (up to a certain amount).

How it works

Tax-advantaged savings account for people whose disability began before age 26 (or 46 if federal law changes). Doesn't count toward SSI/Medicaid limits (up to \$100K).

Pros

- Easy to open and use
- Allows individual control (with support)
- Doesn't require a lawyer

Things to watch out for

- Total contribution limits
- Must be used for "qualified disability expenses"
- May not fully protect large gifts or inheritances

LEARN MORE

Wills

Your will explains how you want your property or money to be handled after your death. It's an important part of any estate plan.

How it works

A will explains who receives your assets, including your loved one.

Pros

- Simple to create
- Ensures your wishes are known

Things to watch out for

- Money left directly to a person with a disability **can cause loss of SSI/Medicaid**
- **Beneficiary designations override your will**, so you must update both.
- Should combine with a **SNT** or **ABLE account** for protection

LEARN MORE

Beneficiary designations

When you open a life insurance policy, retirement account, or bank account, you can name who should receive the money after you pass away.

How it works

Naming someone as a direct beneficiary of an account.

Pros

- Avoids court proceedings
- Quickly transfers funds

Things to watch out for

- Naming the person with a disability **directly** as a beneficiary can cause loss of benefits
- Consider naming an **ABLE account** or **SNT** as the beneficiary instead

LEARN MORE

Not for distribution



Special Needs Trusts (SNTs)

What is a Special Needs Trust?

A **Special Needs Trust**, or **SNT**, is a legal tool that allows families to set aside money or property to support a person with a disability—without putting their eligibility for essential benefits like **Medicaid** or **Supplemental Security Income (SSI)** at risk. These benefits programs have strict rules about how much money someone can have in their name, and even a modest inheritance or gift can push someone over the limit and cause them to lose coverage. A Special Needs Trust helps prevent that. If your child gets SSI and Medicaid and you want to leave them \$100,000 in your will, putting that money in a Special Needs Trust means they can still qualify for those programs. The trust might pay for a wheelchair, a support worker, or a trip to visit family—all without reducing their benefits.

The money in a Special Needs Trust is only for the person with a disability. It can be used to supplement—but not replace—public benefits. It can pay for things that improve quality of life: services like therapy, transportation, education, recreation, or personal support needs that aren't fully covered by Medicaid or SSI.

It's important to understand that Special Needs Trusts are relatively complex and expensive to set up and maintain. For that reason, they're usually best suited for situations involving larger sums of money, such as a lawsuit settlement, inheritance, or long-term family financial planning. You wouldn't typically create a Special Needs Trust to handle a \$500 birthday gift or small one-time contribution—there are simpler and more affordable options for those situations, like an [ABLE account](#).

How do Special Needs Trusts work?

Creating a Special Needs Trust usually requires help from an attorney who specializes in disability or elder law. Once the trust is established, it's managed by a **trustee**—a person or institution legally responsible for handling the funds. The trustee could be a parent, a sibling, a professional fiduciary, a bank, or even a nonprofit trust organization. Trustees are responsible for keeping good records and may need to report spending to government programs like SSI or Medicaid.

The money in the trust is used to pay for a wide range of expenses that support the person with a disability. These are often called “**supplemental needs**,” and they include things like assistive technology, home modifications, dental or vision care, education, vocational training, entertainment, or travel. The key is that the trustee—not the individual—controls the money and pays service providers directly. That's what helps keep the trust from interfering with eligibility for public benefits.

Comparing types of SNTs

There are different types of Special Needs Trusts, and which one you use depends on where the money is coming from. If the funds are contributed by the person with a disability (such as from a settlement or back-pay), the trust is called a **first-party trust**. If the money is from someone else (like a gift or an inheritance from a parent or grandparent), that's a **third-party trust**. An important thing to note about first-party trusts is that any money left when the person with a disability dies is used to pay back Medicaid for services they received. This rule, however, doesn't apply to third-party trusts.

Another option is a **pooled trust**, which is managed by a nonprofit organization and combines funds from multiple people with disabilities for investment purposes. Each person still has their own sub-account, and this structure can make trusts more affordable—especially for families who don't have hundreds of thousands of dollars to set aside but still want the benefits of a trust.

For more information

To learn more about how Special Needs Trusts work and whether one is right for your family, visit [The Arc's Center for Future Planning](#), which offers practical guidance and planning tools for caregivers.

If you're looking into more affordable pooled trust options, several nonprofits in Florida—such as [Guardian Trust](#) or the [Arc of South Florida](#)—offer accessible trust services and walk families through the enrollment process.

→ Quick Review

First-party trust

Best when there's a lawsuit, back pay, or inheritance in their name

Who puts in the money?	Who gets the leftover money when the person dies?
The person with a disability	Medicaid may be paid back first

Third-party trust

Best when family is doing long-term planning

Who puts in the money?	Who gets the leftover money when the person dies?
Someone else (like a parent)	Goes to other family members as stated in the trust

Pooled trust

Best when family wants a lower-cost option or help managing funds

Who puts in the money?	Who gets the leftover money when the person dies?
It varies	Depends on the nonprofit's rules

Tips for families with SNTs

- Choosing the right trustee is a big decision. You can name a **backup trustee** in case your first choice isn't available later, or even name a **co-trustee** to share the responsibility. A lawyer can help you build a plan that works for your family.
- If you're using an SNT as part of your estate plan, it's important to make sure your **will or life insurance policy lists the trust—not your loved one directly—as the beneficiary**. This keeps the money protected and ensures it goes into the trust when you pass away.
- If a person with disabilities receives a **retroactive Social Security payment**, it's excluded as an asset for 9 months—but after that, any remaining funds may disqualify them from SSI or Medicaid. Placing the payment into a Special Needs Trust (SNT) or [ABLE account](#) within that window protects the funds and preserves eligibility for benefits.