

Request for Bids #2026-AF-9900

Title: Aging Families Future Planning

This is a request for bids to conduct an environmental scan of existing person-centered future planning tools available in Florida and at the national level and make preliminary recommendations for use in Florida. Included in this request for bids is information relating to the full Scope of Work of the project and how the bid information is to be submitted.

Date of Release: Tuesday, September 8, 2026

Due Date: Electronic bids will be accepted until 4:00 pm EDT on Friday, October 9, 2026.

All submissions must be marked with Request for Bids #2026-AF-9900. Please allow enough time to upload your bid into the FDDC's Dropbox. Depending upon the size of the bid, it may take additional time to upload. Any bids received after the date and time set forth above will be considered unresponsive and will not be considered by FDDC.

Bids shall be electronically submitted via FDDC's Dropbox at <https://www.dropbox.com/request/na9p64d5a0q0289zwcg3>

Contact: Questions regarding the requirements of the Request for Bids for the Aging Families Future Planning project may be emailed to proposal@fddc.org and must be received by 4:00 pm EDT on Friday, September 18, 2026.

QUESTIONS ARE TO BE SUBMITTED IN WRITTEN FORMAT ONLY. THIS IS A LEGAL PROCESS AND WE CANNOT ANSWER QUESTIONS VERBALLY.

Answers to the questions received will be posted on the Council's website (www.fddc.org) by Thursday, September 24, 2026.

Bid results will be posted on the FDDC website on Monday, October 26, 2026.

Protest Period: Any bidder who desires to protest either the content of this bid or the proposed ranking must do so in writing to at proposal@fddc.org within the 72-hour protest period. FDDC Protest Procedures will be made available upon written request. The protest period is within 72 hours of the posting of the Request for Bids or the posting of the selected bidder.

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

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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 **\$170,000** federal funds for a period not to exceed 10 months for fiscal support of this bid request. 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, and ending September 30, 2028, for annual continuation to convene the Stakeholder Workgroup, develop and/or update tools and toolkits, conduct pilot testing, and revise based on pilot findings.

Funding Source: 100% federal funds, CFDA #93.630 from the U.S. Department of Health & Human Services, Administration for Community Living, through FDDC.

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.

Background

A. Statement of Need

Florida has a growing population of aging family caregivers and aging adults with intellectual and developmental disabilities (I/DD) living in their family homes. Many family caregivers desire to remain in their family homes with continuity of care and services for the person with I/DD while facing their own health challenges. Florida has a need to identify and/or develop person-centered future planning tools for families that address long-term care planning in the domains of housing; legal; identification of primary caregiver(s); financial, including insurance options; day-to-day care, including daily activities and social connections, as well as employment; medical management, including medication; transportation; and technology solutions. This environmental scan and the resulting tools and toolkits identified and developed during future years of the Council's 5-Year State Plan may improve the ability of families/caregivers to better plan for and attain services and supports that assist this population in maintaining quality lives in their communities.

In future years of the 2027-31 State Plan, it is anticipated that the future planning tools and toolkit will be used for a Future Planning Educational Retreat or Conference for Aging Families.

Background on the Issue:

The Florida Developmental Disabilities Council (FDDC) contracted with the North Central Florida Health Planning Council dba WellFlorida Council in 2024 to conduct a Comprehensive Review and Analysis (CRA) of statewide and national data regarding issues facing individuals with I/DD and their families/caregivers. 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. FDDC members used the CRA findings to identify priority areas. The area of "Aging Families" was selected as a major priority area for the FDDC 2027–2031 State Plan.

About 21.6 percent of Florida's population is 65 years of age or older (United States Census Bureau. *American Community Survey 1-Year Survey*, Table DP05, 2019, 2021, 2022), with 18.8 percent of those aged 65 to 84 years of age and about 2.7 percent in the super senior age category of 85 years and older (Florida Department of Health, 2025).

About 75.0 percent of persons with I/DD in Florida (385,100 individuals) live with a family caregiver. In 2023 in Florida, there were more than 385,000 caregiving families with only about 5.0 percent receiving support from the state I/DD agency, that is, Florida's Agency for Persons with Disabilities (APD) (Tanis, E.S., et al., 2025).

The documented prevalence of I/DD in Florida is conservative and likely underestimated. Prevalence grows as Florida's population expands. In Florida, at the highest percentage in the U.S., about 33.0 percent of those living with family caregivers live with aging

caregivers aged 60 years and older (Perkins, End the Wait! Developmental Disability Policy Brief, 2021). As of 2023, 29.0 percent were living with aging caregivers 60 and older (State of the States in I/DD, 2025).

National Residential Information Systems Project (RISP) data indicated that in Florida from 2018 through 2022, most individuals with I/DD who received long-term supports and services (LTSS) resided in a family home. About 65.5 percent of persons with I/DD (41,333 persons) benefiting from LTSS in Florida in 2022 lived in a family home. [University of Minnesota, Residential Information Systems Project (RISP), Research and Training Center on Community Living, Institute on Community Integration, 2024].

Families with aging caregivers and aging persons with I/DD were also identified as being notably unserved or underserved through the CRA. Public input data clearly pointed to aging caregivers, aging persons with I/DD, and aging family groups as a population of special interest. Of the 461 caregivers and family members who completed the CRA survey, 21.4 percent were aged 70 and older with about 14.1 percent aged 65 to 69 years of age. More than half of family member/caregiver survey respondents (54.2 percent) said a critical issue they faced was worry about the future and nearly half (49.0 percent) cited fatigue, stress, and/or burnout among those critical issues. Nearly one-third (31.0 percent) were concerned about financial issues. Resource needs for aging caregivers were also reported by these survey respondents. Among the top service and resource needs of caregivers/family members as reported in the survey were qualified providers (32.3 percent), respite care (27.1 percent), local community-based services (22.8 percent), and assistance with daily caregiving tasks (21.9 percent). Focus groups articulated numerous concerns for aging persons with I/DD as well as the family members who care for them. These included continuity of care and services for the person with I/DD as the caregiver/family member faces their own physical health challenges, availability of ongoing program funding, and the service quality (FDDC Caregiver/Family Survey, 2024).

Florida participants in the National Core Indicators – Intellectual and Developmental Disabilities (NCI-IDD) survey point to inadequacies and challenges with current resources. Only 2.0 percent of Florida respondents reported having 24-hour remote supports (i.e., combined technology and direct care such as sensors, cameras, and other devices). One-quarter (25.0 percent) reported having daily on-site support, another 43.0 percent had 24-hour on-site support or supervision, 21.0 percent said they had scheduled but less frequent than daily support, while 8.0 percent indicated they had none of those options. About 37.0 percent of Florida NCI-IDD participants do not have paid community jobs and want those jobs, 22.0 percent report participating in no community activities while 38.0 percent do participate (both with paid support). While about two-thirds (66.0 percent) of Florida NCI-IDD participants said the services and supports they want to self-direct are always available, another third said this was only sometimes the case (23.0 percent) or not the case (11.0 percent). A little more than half (51.0 percent) said the information they get about budget and services from their benefits financial management services is easy to understand on their own and close behind, another 43.0 percent reported that some of this financial information is easy to understand or they understand with help from other; 6.0 percent find it not easy and do not get help to understand it. Only 27.0 percent of Floridians with I/DD who responded to the NCI-IDD survey reported having attended a self-advocacy

meeting or event or had the opportunity to and chose not to, and about 54.0 percent report having voted in a local or national election (National Core Indicators - Intellectual and Developmental Disabilities, 2023).

Aging families was rated as a priority key issue or theme by five of the seven CRA information sources, with only self-advocate focus group and survey respondents not prioritizing this issue. In further prioritizing key issues for goal areas, “Aging Families” was ranked by Council members in the top three priority issue areas for developing key goals for the 2027–2031 state plan.

In developing priorities for goals, objectives, and activities in 2025 for the FDDC 2027–31 State Plan, FDDC members’ priority issues within the realm of “Aging Families” included the need to consider the following pertaining to future planning: transition support for the family; burden and challenges of planning; advance care planning; financial planning; preparing and educating siblings who will have decision-making responsibilities; and creating a navigation map of planning options and checklist or “to do” list for advance planning.

The concerns and needs identified for the priority area of “Aging Families” through the CRA led the FDDC to develop the following goal, objective, and activity for the 2027–31 State Plan, which support work to be conducted under this request for bids:

Goal 3: Aging Families

By September 30, 2031, aging individuals with I/DD and their families will have increased availability of services and supports needed by an aging population that allows them to maintain quality lives in their communities.

Objective 3.1: By September 30, 2031, aging individuals with I/DD and their family members will have increased access to future planning resources and tools designed to improve attainment and delivery of services and supports that meet the needs of an aging population.

Key Activity 3.1.1: Identify, adapt with consent, and/or develop person-centered future planning tools for families to minimally address long-term care planning in the domains of housing; legal; identification of primary caregiver(s); financial, including insurance options; day-to-day care, including daily activities and social connections, as well as employment; medical management, including medication; transportation; and technology solutions.

B. Project Description

This project seeks to identify, adapt with consent, and/or develop person-centered future planning tools for families to minimally address long-term care planning in the domains of housing; legal; identification of primary caregiver(s); financial, including insurance options; day-to-day care, including daily activities and social connections, as well as employment; medical management, including medication; transportation; and technology solutions. The scope of work will include 1) convening and facilitating a stakeholder workgroup, 2) conducting an environmental scan of existing person-centered future

planning tools available in Florida (e.g., the Council’s Planning Ahead aging component) and at the national level (e.g., The Arc’s Center for Future Planning tools) and making recommendations for Florida, and 3) identifying, adapting with consent, and/or developing new person-centered future planning tool(s) specifically for Florida.

Scope of Work to Be Provided

1. Convene and facilitate a Stakeholder Workgroup for a minimum of four (4) meetings to provide input into all planned activities.
 - a. Select Stakeholder Workgroup with input from Council staff to minimally include people with I/DD, family members (i.e., parents, siblings, guardians) and selected local and state agency representatives. **(Within 45 days of contract execution)**
 - b. Provide a list of Stakeholder Workgroup members to be approved by Council staff that includes name, contact information, affiliation/role on the Stakeholder Workgroup, and demographic information for all members. **(Within 45 days of contract execution)**
 - c. Facilitate four (4) virtual Stakeholder Workgroup meetings with at least one held each reporting period. **(Quarters 1, 2, 3, 4)**
 - d. Submit agendas, PowerPoints, and minutes or reports with attendance to include name, role/affiliation, and member input and recommendations from each virtual Stakeholder Workgroup meeting. **(Quarters 1, 2, 3, 4)**
 - e. Conduct the FDDC social validity survey with the Stakeholder Workgroup members at the last virtual meeting. **(Quarter 4)**
2. Conduct an environmental scan of existing person-centered future planning tools available in Florida (e.g., the Council’s Planning Ahead aging component) and at the national level (e.g., The Arc’s Center for Future Planning tools) and make preliminary recommendations for Florida.
 - a. Identify Florida-based tools and initiatives including FDDC, Agency for Persons with Disabilities (APD) resources, Florida Department of Elder Affairs caregiver programs, University-based tools or extension programs, Local nonprofit and advocacy organization planning tools. **(Quarter 1)**
 - b. Identify national models and best practices such as The Arc’s Center for Future Planning tools, Administration for Community Living (ACL) caregiver planning resources, State DD councils, American Association of Retired Persons (AARP) caregiving and long-term care planning tools. **(Quarter 1)**
 - c. Submit draft environmental scan report. **(Quarter 1)**
 - d. Submit final environmental scan report. **(Quarter 2)**
3. Determine in conjunction with the Stakeholder Workgroup which person-centered future planning tool(s) will be used, adapted with consent, or if new tool(s) will be developed specifically for Florida.
 - a. Create a structured comparison tool to evaluate each resource across consistent domains (i.e., target population, planning domain, ease of use, accessibility, integration with state systems or pathways, evidence base). **(Quarter 3)**
 - b. Conduct an analysis of the missing elements in existing person-centered future planning tool(s) available and define the rationale for decision-making regarding new or existing tools recommended for Florida. **(Quarter 3)**

- c. Review tools and gaps with Stakeholder Workgroup members to determine which person-centered future planning tool(s) to use and/or if a tool(s) needs to be developed specifically for Florida. **(Quarter 3)**
 - d. Finalize and submit a summary report of person-centered future planning tool(s) that have been selected to be used, adapted, or developed for Florida. **(Quarter 4)**
4. Fulfill Council programmatic requirements as follows:
 - a. Complete and submit quarterly deliverables along with supporting documentation to also include an updated work plan each deliverable period. **(Quarters 1, 2, 3, 4)**
 - b. Participate in regularly scheduled meetings with program staff. **(Quarters 1, 2, 3, 4)**
 - c. 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). **(Quarter 4)**

Time frame

The time frame for the work for the Aging Families Future Planning project is December 1, 2026, through September 30, 2027. Quarters are defined by the following dates: Quarter 1: December 1, 2026 – February 15, 2027; Quarter 2: February 16, 2027–April 30, 2027; Quarter 3: May 3, 2027–July 30, 2027; and Quarter 4: August 1, 2027–September 30, 2027 with final deliverable due by September 20, 2027 and invoice submission by September 22, 2027. Anticipated continuation October 1, 2027 – September 30, 2028, *contingent* upon availability of funding.

Bid Submission Instructions

Interested individuals must submit the following Bid Information by 4:00 pm EDT on Friday, October 9, 2026.

- **The bid must include the following:**

- A signed Letter of Transmittal confirming that you understand the Scope of Work required; confirming that you will be able to perform all the work specified in the Scope of Work within the specified time frame; and providing your name, the name of your organization (if applicable), your address, phone number, email address, SAM Unique Entity ID (if available), and SAM.GOV registration status including expiration date or date registration was submitted.
- A completed FDDC Budget Request Form, which must include the requested FDDC budget funds, including FTE and/or hourly rate information for all personnel and/or consultants.
- A narrative description of your experience in conducting environmental scans and/or research, knowledge of and experience in Future Planning for individuals with intellectual and developmental disabilities and/or the aging population, and experience with stakeholder workgroups. Include information about the personnel and/or consultants who will be engaged in implementing all facets of the Aging Families Future Planning project.

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- A completed FDDC Aging Families Future Planning Bid Work Plan Template to include Person(s) Responsible and Bidder's Qualifications to Deliver Planned Scope of Work and Services.
- A sample of a professionally written work product (e.g., research report, journal article) that is related to the Scope of Work for this activity.

Bid Selection

The lowest and most responsive bid will be selected contingent upon a Letter of Transmittal confirming that the bidder can (1) perform all the work outlined in the Scope of Work within the specified time frame, and (2) demonstrate responsiveness in meeting the minimum requirements described within this bid request as indicated through the narrative description, Aging Families Future Planning Bid Work Plan Template, and sample research report and/or journal article. The Council reserves the right to select the next lowest bid if the lowest bid is not found responsive in meeting the minimum requirements. The FDDC reserves the right to reject any or all bids. Verification of mandatory terms and conditions must be met prior to contract execution. No work shall begin until a contract is executed by the FDDC.

Minimum Requirements to Determine Responsiveness

- **Budget narrative:** Sufficiently supports reasonable, allowable, and necessary use of FDDC funds.
- **Collaboration with diverse participants:** Identifies experience in collaborating with and facilitating diverse groups, including families/caregivers (e.g., parents, siblings, guardians) of individuals with I/DD.
- **Subject matter expertise:** Identifies knowledge of and experience in Future Planning for individuals with intellectual and developmental disabilities and/or the aging population.
- **Research experience:** Identifies experience conducting literature reviews and/or environmental scans.
- **Evaluation experience:** Provides evidence of experience in data analysis and presentation of results and findings.
- **Organizational capacity:** Identifies sufficient and qualified staff and resources to fulfill the Scope of Work as prescribed in the work plan and/or narrative.
- **Product review:** Submits a professionally written work product (e.g., research report, journal article) that is related to the Scope of Work for this activity.

Vendor Disqualification – Prior Participation

Any Vendor that participated in or assisted with the development, design, planning, or preparation of the work, specifications, requirements, or scope of work that is the subject of this Request for Bids (RFB) is ineligible to submit a bid or be awarded a contract resulting from this RFB.

Under the provisions of CFR § 200.319

(a) All procurement transactions under the Federal award must be conducted in a manner that provides full and open competition and is consistent with the standards of this section and § 200.320.

(b) To ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids must be excluded from competing on those procurements.

This prohibition applies whether the Vendor participated directly or through an affiliate, subcontractor, consultant, or other representative.

Vendor Responsibility and Past Performance

The Council may consider a Vendor's documented past performance under current or prior contracts, including instances of poor, delayed, or unsatisfactory performance, default, failure to meet contractual requirements or schedules, or unresolved material performance issues. The Council reserves the right to evaluate the overall responsibility and past record of the bidding entity before final award.

Under the Provision of CFR § 200.318(h): Responsible contractors. The recipient or subrecipient must award contracts only to responsible contractors that possess the ability to perform successfully under the terms and conditions of a proposed contract. The recipient or subrecipient must consider contractor integrity, public policy compliance, proper classification of employees (see the Fair Labor Standards Act, 29 U.S.C. 201, chapter 8), past performance record, and financial and technical resources when conducting a procurement transaction.