



## ERIE COUNTY

### REQUEST FOR PROPOSAL (RFP) TO PROVIDE LIVE WELL ERIE INITIATIVES 2025

**RFP # 2025-034VF**



Erie County Department of Social Services

**EDWARD A. RATH COUNTY OFFICE BUILDING  
95 FRANKLIN STREET  
BUFFALO, NEW YORK 14202**

**COUNTY OF ERIE, NEW YORK**  
**REQUEST FOR PROPOSALS (“RFP”) # 034VF**  
**TO PROVIDE LIVE WELL INITIATIVES 2025**

**I. INTRODUCTION**

The County of Erie, New York (the “County”) is currently seeking proposals from qualified not-for-profit agencies (“Proposer”) interested in providing Live Well Initiatives. Proposers interested in providing a transformational project that aligns with Live Well Erie’s goals are invited to respond to this request. We will favor projects that create long-term change.

It is the County’s intent to select the Proposer(s) that provides the best solution for the County’s needs. Erie County Department of Social Services (ECDSS) is a trauma-informed organization and believes in the power of its principles when serving the citizens of Erie County. ECDSS incorporates the five principles of trauma informed care (collaboration, safety, trustworthiness, empowerment, and choice) throughout its services to promote resilience and healing.

The County reserves the right to amend this RFP, reject any or all of the proposals, or any part thereof, submitted in response to this RFP, and reserves the right to waive any irregularities or informalities, if such action is deemed to be in the best interest of the County. The County reserves the right to request additional information from any Proposer, and to award negotiated contracts to one or more Proposers.

This RFP is not intended and shall not be construed to commit the County to pay any costs incurred in connection with any proposal or to procure or contract with any firm.

The County will only contract with firms that do not discriminate against employees or applicants for employment because of race, creed, color, national origin, sex, age, disability, marital status, sexual orientation, citizenship status or any other status protected by New York State and Federal laws.

**II. FUNDING AND BUDGET**

Funding amounts may range from \$5,000 to \$40,000. The performance period for funded projects will be limited to 3 years. The start date of the project must fall after the funding decisions are announced. These funds are for a one-time grant and will not be sustained for future years. All contract appropriations are subject to Legislative approval.

*Note: By Executive Order from the NYS Governor and the Erie County Executive, administrative costs may not exceed 15% of the requested funds. Lower Administrative costs will be favored when rating proposals.*

**III. PROPOSAL TIMEFRAMES**

The following schedule is for informational purposes only. The County reserves the right to amend this schedule at any time.

Issue RFP: May 12, 2025

RFP Informational Meeting: 5/21/25, at 10AM via Webex

Join the meeting link

<https://erie.webex.com/erie/j.php?MTID=m43aff5d6f9af46c33f938667c59ef77c>

**Join by meeting number**

Meeting number (access code): 2484 087 0304

Meeting password: p3pDeScwM79

**Tap to join from a mobile device (attendees only)**

[+1716-858-2250](tel:+1716-858-2250) [,24840870304##](tel:+1716-858-2250) United States Toll (Buffalo)

[+1-415-655-0003](tel:+1415-655-0003) [,24840870304##](tel:+1415-655-0003) United States Toll

**Join by phone**

+1 716-858-2250 United States Toll (Buffalo)

+1-415-655-0003 United States Toll

[Global call-in numbers](#)

**Join from a video system or application**

Dial [24840870304@webex.com](tel:+1716-858-2250)

You can also dial 173.243.2.68 and enter your meeting number.

Register for the Informational Meeting  
by contacting:

Talisa.king@erie.gov by May 21, 2025

Proposals Due:

June 10, 2025

Selection Made by:

July 10, 2025

Contract Signed:

Following all necessary County approvals.

#### **IV. GENERAL REQUIREMENTS**

1. Each proposal shall be prepared simply and economically, avoiding the use of elaborate promotional materials beyond what is sufficient to provide a complete, accurate and reliable presentation.
2. Your proposal must be comprised of 3 sections, presented as separate documents:
  - a. Appendix A
    - i. Proposal to Provide Service
    - ii. Technical and Organization
    - iii. Signed Schedule A
  - b. Appendix B
    - i. Signed Fiscal Form
    - ii. Budget Form
  - c. Appendix C
    - i. Most recent Audit report prepared by an independent CPA<sup>1</sup>
    - ii. Most recent Management Letter
    - iii. Listing of Officers and Board of Directors
    - iv. Copies of the IRS federal tax exemption determination letters.

Failure to follow the prescribed format for responses may result in disqualification.

3. Submission of the proposals shall be emailed as three separate PDFs (Appendix A, B and C) Talisa King at [Talisa.King@erie.gov](mailto:Talisa.King@erie.gov)

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<sup>1</sup> If not available, the latest tax return may be submitted in lieu of the audit report and/or management letter.

4. If unable to email the proposal, a printed submission may be submitted to: Erie County Executive's Office, Attn: Talisa King, 95 Franklin Street, 13<sup>th</sup> Floor, Buffalo, NY 14202.
5. All proposals must be delivered to the above office on or before June 10, 2025, at 4:00 p.m. Proposals received after the above date and time will not be considered. The County is under no obligation to return proposals.
6. Requests for clarification of this RFP must be written and submitted to Talisa King at the above address, or at [Talisa.king@erie.gov](mailto:Talisa.king@erie.gov) no later than 4:00 pm on May 19, 2025. A list of questions and answers will be posted on the County website by May 23, 2025. No communication of any kind will be binding against the county, except for the formal written responses to any request for clarification.
7. Proposers may be required to give an oral presentation and/or additional information to the County to clarify or elaborate on the written proposal. Those Proposers will be notified to arrange specific times.
8. No proposal will be accepted from nor any agreement awarded to any Proposer that is in arrears upon any debt or in default of any obligation owed to the County. Additionally, no agreement will be awarded to any Proposer that has failed to satisfactorily perform pursuant to any prior agreement with the County.
9. Information on the Standard Insurance Provisions required by agencies selected as a contractor for this service is included in this RFP. This document is for informational purposes only and is not to be submitted by the Proposer for the purposes of this RFP.
10. All potential contract-holders with Erie County shall agree to comply with Executive Order 13 (2014), and the Agency shall make such records available, upon request, to the County's Division of Equal Employment Opportunity for review. All contract holders will be required to sign the Erie County Equal Pay Certification (attached). The County shall have the right, upon reasonable notice and at reasonable times, to inspect the books and records of the Agency, its offices and facilities, for the purpose of verifying information supplied in the Erie County Equal Pay Certification and for any other purpose reasonably related to confirming the Agency's compliance with Erie County Executive Order No. 13 (2014). Violation of the provisions of Executive Order 13 (2014), which is attached hereto and made a part hereto and made a part hereof, can constitute grounds for the immediate termination of a contract, and may constitute grounds for determining that a bidder is not qualified to participate in future county contracts.
11. Certified Minority Business Enterprise/ Women's Business Enterprise (MBE/WBE) proposers should include the Erie County MBE/WBE Certification letter with their proposal.
12. A business that is a certified Service-Disabled Veteran Owned Business (SDVOB) under the New York State Service-Disabled Veteran-Owned Business Act should include the letter indicating their company is 51% or more veteran-owned with their proposal.
13. All proposers must disclose the name, title, and department of any employee or officer who was an employee or officer of Erie County within the 12 months immediately prior to the proposal.
14. If requested, proposers must provide a list of at least three references from community partners and collaborators or an individual with knowledge of and experience with the specific services being offered.
15. All proposers must provide a list of all prime contractors and subcontractors that their agency does business with related to the service in this RFP.

## **V. SCOPE OF PROFESSIONAL SERVICES REQUIRED**

### **A. Introduction:**

Projects that may be funded include, but are not limited to, are:

- Community Innovation Projects: Projects used to increase collective understanding of an issue, generate ideas, and/or test and implement solutions.
- Capacity Building Projects: Projects that strengthen an organization's ability to fulfill its mission.
- Facilities and Equipment Grants: Projects for purchase or improvements to long-lasting physical assets, such as building, vehicle or computer equipment.
- Start-Up Grants: Funding awarded to help launch a specified new project, program or initiative.

Grants for the following will not be considered:

- Lobbying and activities to influence specific legislation
- Conference fees and scholarships
- For-profit Businesses
- Churches (Faith-based human service organizations are welcome to apply.)
- Individuals

### **B. Program Information:**

The Live Well Erie effort is an approach for Erie County that incorporates collective impact and results-based management. Live Well Erie has identified nine different areas of focus to improve the health and well-being of Erie County residents in or at risk of falling into poverty separated into three population categories. All proposals must address one (or more) of the following priority areas:

#### **Give Every Child a Chance to Succeed:**

- Children will grow up in a stable, safe, and supportive community.
- Children will achieve comprehensive health (physical, mental, social and emotional).
- Children will realize their greatest potential.

#### **Empower Working Families:**

- Families in Erie County will have safe, affordable housing.
- Families in Erie County will have greater financial security.
- Families in Erie County will have access to quality, affordable childcare.
- Improve transportation and mobility for all people

#### **Support for our Seniors**

- Older Adults will be able to maintain an active and stimulating social life as they age.
- Erie County will be accessible to people of all ages.
- Older Adults will be able to maintain financial security throughout their lives.

In alignment with the Live Well Erie effort, proposers must incorporate one or more of the following five principals into their proposals:

- Social Determinants of Health: Improving the conditions in which people are born, grow, live, work and age.
- Race and Rural Equity: Reducing disparities of disempowered individuals and/or groups, specifically racial minorities and rural residents.
- Collective Impact: Collaboration between non-traditional partners on a common agenda to foster mutually reinforcing activities.
- Innovative Approaches: Implementation of unconventional strategies, from policy design to service delivery, to improve outcomes for residents.
- Modernization of Service Delivery: Using information and communication technology to easily and efficiently deliver services.

### **C. Expectations:**

- Grantees are expected to participate in the ongoing Live Well Erie effort.

- Grantees are expected to brand any materials that result from the project with “Live Well Erie” branding.
- Grantees are expected to provide quarterly reports of their progress.

**D. Eligibility:**

To be eligible for Erie County funding your organization must:

- Be located and provide services in Erie County; AND
- Be determined by the Internal Revenue Service to be tax-exempt under Section 501(c)(3) of the Internal Revenue Code; AND
- Have its mission statement in alignment with the priority areas of Live Well Erie; and
- Be actively enrolled as a Live Well Erie Partner

**E. Application:**

Your proposal must be comprised of 3 sections, presented as separate documents:

- Appendix A
  - Proposal to Provide Service
  - Technical and Organization
  - Signed Schedule A
- Appendix B
  - Signed Fiscal Form
  - Budget Form (“RFP Fiscal Calculations”)
- Appendix C
  - Most recent Audit report prepared by an independent CPA<sup>2</sup>
  - Most recent Management Letter
  - Listing of Officers and Board of Directors
  - Copies of the IRS federal tax exemption determination letters.

**VI. STATEMENT OF RIGHTS**

**UNDERSTANDINGS**

**Please take notice**, by submission of a proposal in response to this request for proposals, the Proposer agrees to and understands:

- that any proposal, attachments, additional information, etc. submitted pursuant to this Request for Proposals constitute merely a suggestion to negotiate with the County and is not a bid under Section 103 of the New York State General Municipal Law.
- submission of a proposal, attachments, and additional information shall not entitle the Proposer to enter into an agreement with the County for the required services.
- by submitting a proposal, the Proposer agrees and understands that the County is not obligated to respond to the proposal, nor is it legally bound in any manner whatsoever by submission of same;
- that any and all counter-proposals, negotiations or any communications received by a proposing entity, its officers, employees or agents from the County, its elected officials, officers, employees or agents, shall not be binding against the County, its elected officials, officers, employees or agents unless and until a formal written agreement for the services sought by this RFP is duly executed by both parties and approved by the Erie County Legislature and the Office of the Erie County Attorney.

In addition to the foregoing, by submitting a proposal, the Proposer also understands and agrees that the County reserves the right, and may at its sole discretion, exercise the following rights and options with respect to this Request for Proposals:

<sup>2</sup> If not available, the latest tax return may be submitted in lieu of the audit report and/or management letter.

- To reject any or all proposals.
- To issue amendments to this RFP.
- To issue additional solicitations for proposals.
- To waive any irregularities or informalities in proposals received after notification to Proposers affected.
- To select any proposal as the basis for negotiations of a contract, and to negotiate with one or more of the Proposers for amendments or other modifications to their proposals.
- To conduct investigations with respect to the qualifications of each Proposer.
- To exercise its discretion and apply its judgment with respect to any aspect of this RFP, the evaluation of proposals, and the negotiations and award of any contract.
- To enter into an agreement for only portions (or not to enter into an agreement for any) of the services contemplated by the proposals with one or more of the Proposers.
- To select the proposal that best satisfies the interests of the County and not necessarily on the basis of price or any other single factor.
- To interview the Proposer(s).
- To request or obtain additional information the County deems it necessary to determine the ability of the Proposer.
- To modify dates.
- All proposals prepared in response to this RFP are at the sole expense of the Proposer, and with the express understanding that there will be no claim, whatsoever, for reimbursement from the County for the expenses of preparation. The County assumes no responsibility or liability of any kind for costs incurred in the preparation or submission of any proposal.
- While this is an RFP and not a bid, the County reserves the right to apply the case law under General Municipal Law § 103 regarding bidder responsibility in determining whether a Proposer is a responsible vendor for the purpose of this RFP process.
- The County is not responsible for any internal or external delivery delays which may cause any proposal to arrive beyond the deadline stated. To be considered, proposals MUST arrive at the place specified herein and be time stamped prior to the deadline.

## **EVALUATION**

The following criteria, not necessarily listed in order of importance, will be used to review the proposals. The County reserves the right to weigh its evaluation criteria in any manner it deems appropriate:

- The Proposer's demonstrated capability to provide the services.
- Evaluation of the professional qualifications and experience of program staff.
- The Proposer's experience in performing the proposed services.
- The Proposer's financial ability to provide the services.
- Evaluation of the Proposer's fee submission. It should be noted that while price is not the only consideration, it is an important one.
- A determination that the Proposer has submitted a complete and responsive proposal as required by this RFP.
- An evaluation of the Proposer's projected approach and plans to meet the requirements of this RFP.
- The Proposer's presentation at and the overall results of any interview conducted with the Proposer.
- Proposers MUST sign the Proposal Certification attached hereto as Schedule "A". Unsigned proposals will be rejected.

- Proposers may be required to give an oral presentation to the County to clarify or elaborate on the written proposal.
- No proposal will be accepted from nor any agreement awarded to any Proposer that is in arrears upon any debt or in default of any obligation owed to the County. Additionally, no agreement will be awarded to any Proposer that has failed to satisfactorily perform pursuant to any prior agreement with the County.

## **EVALUATION PROCESS**

Each proposal will undergo an initial administrative review for completeness. For a proposal to be evaluated, it must include all required documents. Upon completion of the administrative review, and at the sole discretion of the Commissioner, the Department will request any missing documentation from the Proposer and will review all documents for completeness upon receipt of the missing documents. All required documents for a complete proposal, as set forth in this RFP, must be submitted and be completed to the satisfaction of the Department within forty-eight (48) hours of request for the proposal to be deemed responsive and eligible for Contract award.

Complete proposals will be judged by a scoring committee. The scoring committee will consist of individuals from the Department of Social Services, Senior Services, Environment and Planning, Public Advocacy, and the Office of Health Equity. The proposal should be written so as to clearly describe the services provided to someone not familiar with service delivery.

The proposals will be scored based on the overall proposal (30%), population and goals (30%), program plan and capacity (30%), MWBE/SDVOB participation (10%), and compliance with RFP requirements and fiscal components.

## **CONTRACT**

After selection of the successful Proposer, a formal written contract will be prepared by the County and will not be binding until signed by both parties and, if necessary, approved by the Erie County Legislature, the Erie County Fiscal Stability Authority and the Office of the County Attorney. NO RIGHTS SHALL ACCRUE TO ANY PROPOSER BY THE FACT THAT A PROPOSAL HAS BEEN SELECTED BY THE COUNTY FOR SUBMISSION TO THE ERIE COUNTY LEGISLATURE AND/OR IF NECESSARY THE ERIE COUNTY FISCAL STABILITY AUTHORITY FOR APPROVAL. THE APPROVAL OF SAID LEGISLATURE AND/OR AUTHORITY MAY BE NECESSARY BEFORE A VALID AND BINDING CONTRACT MAY BE EXECUTED BY THE COUNTY.

The award period will be for a three-year term. Initial award and renewals are subject to inclusion of funding in the County Executive Recommended Budget and as adopted by the Erie County Legislature, as well as, contingent upon availability of New York State funds appropriated for this purpose.

## **INDEMNIFICATION AND INSURANCE**

The Proposer accepts and agrees that language in substantially the following form will be included in the contract between the Proposer and the County:

“In addition to, and not in limitation of the insurance requirements contained herein the Proposer agrees:

(a) that except for the amount, if any, of damage contributed to, caused by or resulting from the negligence of the County, the Proposer shall indemnify and hold harmless the County, its officers, employees and agents from and against any and all liability, damage, claims, demands, costs, judgments, fees, attorneys' fees or loss arising directly or indirectly out of the acts or omissions hereunder by the Proposer or third parties under the direction or control of the Proposer; and



(b) to provide defense for and defend, at its sole expense, any and all claims, demands or causes of action directly or indirectly arising out of this Agreement and to bear all other costs and expenses related thereto.

Upon execution of any contract between the Proposer and the County, the Proposer will be required to provide proof of the applicable insurance coverage.

Insurance coverage in amount and form shall not be deemed acceptable until approved by the County Attorney.

## **INTELLECTUAL PROPERTY RIGHTS**

The Proposer accepts and agrees that language in substantially the following form will be included in the contract between the Proposer and the County:

All deliverables created under this Agreement by the Proposer are to be considered "works made for hire". If any of the deliverables do not qualify as "works made for hire", the Proposer hereby assigns to the County all right, title and interest (including ownership of copyright) in such deliverables and such assignment allows the County to obtain in its name copyrights, registrations and similar protections which may be available. The Proposer agrees to assist the County, if required, in perfecting these rights. The Proposer shall provide the County with at least one copy of each deliverable.

The Proposer agrees to defend, indemnify, and hold harmless the County for all damages, liabilities, losses and expenses arising out of any claim that a deliverable infringes upon an intellectual property right of a third party. If such a claim is made, or appears likely to be made, the Proposer agrees to enable the County's continued use of the deliverable, or to modify or replace it. If the County determines that none of these alternatives is reasonably available, the deliverable will be returned.

All records compiled by the Proposer in completing the work described in this Agreement, including but not limited to written reports, source codes, studies, drawings, blueprints, negatives of photographs, computer printouts, graphs, charts, plans, specifications and all other similar recorded data, shall become and remain the property of the County. The Proposer may retain copies of such records for its own use.

NOTE: All contracts executed by the Erie County Department of Social Services will be posted electronically on the Department's website.

## **NON-COLLUSION**

The Proposer, by signing the proposal, does hereby warrant and represent that any ensuing agreement has not been solicited, secured or prepared directly or indirectly, in a manner contrary to the laws of the State of New York and the County of Erie, and that said laws have not been violated and shall not be violated as they relate to the procurement or the performance of the agreement by any conduct, including the paying or the giving of any fee, commission, compensation, gift, gratuity or consideration of any kind, directly or indirectly, to any County employee, officer or official.

## **CONFLICT OF INTEREST**

All Proposers must disclose with their proposals the name of any officer, director or agent who is also an employee of the County. Further, all Proposers must disclose the name of any County employee who owns, directly or indirectly, an interest of ten percent (10%) or more in the firm or any of its subsidiaries or affiliates.

There shall be no conflicts in existence during the term of any contract with the County. The existence of a conflict shall be grounds for termination of a contract.

## COMPLIANCE WITH LAWS

By submitting a proposal, the Proposer represents and warrants that it is familiar with all federal, state and local laws and regulations and will conform to said laws and regulations. The preparation of proposals, selection of Proposers and the award of contracts are subject to provisions of all Federal, State and County laws, rules and regulations.

## CONTENTS OF PROPOSAL

The New York State Freedom of Information Law as set forth in Public Officers Law, Article 6, Sections 84 et seq., mandates public access to government records. However, proposals submitted in response to this RFP may contain technical, financial background or other data, public disclosure of which could cause substantial injury to the Proposer's competitive position or constitute a trade secret. Proposers who have a good faith belief that information submitted in their proposals is protected from disclosure under the New York Freedom of Information Law shall:

a) insert the following notice in the front of its proposal:

### **"NOTICE**

**The data on pages \_\_\_\_ of this proposal identified by an asterisk (\*) contains technical or financial information constituting trade secrets or information the disclosure of which would result in substantial injury to the Proposer's competitive position.**

**The Proposer requests that such information be used only for the evaluation of the proposal, but understands that any disclosure will be limited to the extent that the County considers proper under the law. If the County enters into an agreement with this Proposer, the County shall have the right to use or disclose such information as provided in the agreement, unless otherwise obligated by law."**

**and**

b) clearly identify the pages of the proposals containing such information by typing in bold face on the top of each page " **\* THE PROPOSER BELIEVES THAT THIS INFORMATION IS PROTECTED FROM DISCLOSURE UNDER THE STATE FREEDOM OF INFORMATION LAW."**

The County assumes no liability for disclosure of information so identified, provided that the County has made a good faith legal determination that the information is not protected from disclosure under applicable law or where disclosure is required to comply with an order or judgment of a court of competent jurisdiction.

The contents of the proposal which is accepted by the County, except portions "Protected from Disclosure", may become part of any agreement resulting from this RFP.

## EFFECTIVE PERIOD OF PROPOSALS

All proposals must state the period for which the proposal shall remain in effect (i.e. how much time does the County have to accept or reject the proposal under the terms proposed). Such period shall not be less than one hundred eighty (180) days from the proposal date.

### Erie County Equal Pay Certification

In order to comply with Executive Order 13 dated November 6, 2014, we hereby certify that we are in compliance with federal law, including the Equal Pay Act of 1963, Title VII of the Civil Rights Act of 1964, Federal Executive Order 11246 of September 24, 1965 and New York State Labor Law Section 194 (together "Equal Pay Law"). The average compensation for female employees is not consistently below the average compensation for male employees, taking into account mitigating factors. We understand that this certification is a material component of this contract. Violation of the provisions of Executive Order 13, which is attached hereto and made a part hereof, can constitute grounds for the immediate termination of this contract and may constitute grounds for determining that a bidder is not qualified to participate in future county contracts.

We have evaluated wages and benefits to ensure compliance with the Federal Equal Pay Law.

\_\_\_\_\_  
Signature

#### Verification

STATE OF \_\_\_\_\_ )  
COUNTY OF \_\_\_\_\_ ) SS:  
A)

\_\_\_\_\_, being duly sworn, states he or she is the owner of (or a partner in) \_\_\_\_\_, and is making the foregoing Certification and that the statements and representations made in the Certification are true to his or her own knowledge.

B)

\_\_\_\_\_, being duly sworn, states that he or she is the Name of Corporate Officer \_\_\_\_\_, of \_\_\_\_\_, Title of Corporate Officer Name of Corporation the enterprise making the foregoing Certification, that he or she has read the Certification and knows its contents, that the statements and representations made in the Certification are true to his or her own knowledge, and that the Certification is made at the direction of the Board of Directors of the Corporation.

Sworn to before me this \_\_\_\_\_  
Day of \_\_\_\_\_, 20\_\_  
\_\_\_\_\_

# Guidelines for Standard Insurance Provisions Required (for Informational Purposes Only)

LAW-1-INS (Rev. 6/19)



## County of Erie Standard Insurance Certificate

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME	
	PHONE (A/C, Hs, Ext)	FAX (A/C Hs)
	EMAIL ADDRESS	
	PRODUCER CUSTOMER ID #	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
INSURED	INSURER A:	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSUR LTR	TYPE OF INSURANCE	ADDITIONAL INSURER	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>GENERAL LIABILITY</b>					EACH OCCURRENCE \$
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY					DAMAGE TO RENTED PREMISES (Excludes auto)
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR					MED EXP (Any one person)
						PERSONAL & ADV INJURY
						GENERAL AGGREGATE
	GEN'L AGGREGATE LIMIT APPLIES PER:					PRODUCTS COMP/OP AGG
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC					
	<b>AUTOMOBILE LIABILITY</b>					COMBINED SINGLE LIMIT (Ex accident)
	<input type="checkbox"/> ANY AUTO					BODILY INJURY (Per person)
	<input type="checkbox"/> ALL OWNED AUTOS					BODILY INJURY (Per accident)
	<input type="checkbox"/> SCHEDULED AUTOS					PROPERTY DAMAGE (Per accident)
	<input type="checkbox"/> HIRED AUTOS					
	<input type="checkbox"/> NON-OWNED AUTOS					
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR					EACH OCCURRENCE \$
	<b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE					AGGREGATE \$
	DEDUCTIBLE					
	RETENTION \$					
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>					WC STATUS TORT LIMITS: <input type="checkbox"/> OTH ER: <input type="checkbox"/>
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<input type="checkbox"/> Y/N				E.L. EACH ACCIDENT \$
	If yes describe under DESCRIPTION OF OPERATIONS below	N/A				E.L. DISEASE - EA EMPLOYEE \$
						E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

### CERTIFICATE HOLDER

County of Erie  
95 Franklin St  
Buffalo NY, 14202

### CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

X. FOR COUNTY USE ONLY:

Name of County Dept. Requesting Certificate

Purchase Order or Contact Number

Vendor Insurance Classification

**RETURN TO: ECDSS OFFICE OF COUNSEL**

**95 Franklin St. ROOM 746**

**Buffalo, NY 14202**

# INSTRUCTIONS FOR COUNTY OF ERIE STANDARD INSURANCE CERTIFICATE

- I. Insurance shall be procured and certificates delivered before commencement of work or delivery of merchandise or equipment.
- II. CERTIFICATES OF INSURANCE
  - A. Shall be made to the "County of Erie, 95 Franklin St, Buffalo NY, 14202."
  - B. Coverage must comply with all specifications of the contract.
  - C. Must be executed by an insurance company, agency or broker, which is licensed by the Insurance Department of the State of New York. If executed by a broker, notarized copy of authorization to bind or certify coverage must be attached.
- III. Forward the completed certificate to: County of Erie, (Department or Division) responsible for entering into the agreement for construction, purchase, lease or service.
- IV. Minimum coverage with limits are as follows:

Vendor Classification	A Construction and Maintenance	B Purchase or Lease of Merchandise or Equipment	C Professional Services	D Property Leased To Others Or Use Of Facilities Or Grounds	E Concession-Aires Services	F Livery Services	G All Purposes Public Entity Contracts
Commercial Gen. Liab.	\$1,000,000 per occ.	\$1,000,000 CSL	\$1,000,000 CSL	\$1,000,000	\$1,000,000 CSL	\$1,000,000	\$1,000,000 CSL
General Aggregate	\$2,000,000						
Products Comp. Ops.	\$2,000,000						
Blanket Broad Form	Not Excluded or Limited		INCLUDE	INCLUDE	INCLUDE	INCLUDE	INCLUDE
Contractual Liability							
Broad Form P.D.							
X.C.U.							
Liquor Law				INCLUDE			
Auto Liab.	\$1,000,000 CSL		\$1,000,000 CSL	\$1,000,000 CSL	\$1,000,000 CSL	\$1,000,000 CSL	\$1,000,000 CSL
Owned	INCLUDE		INCLUDE	INCLUDE	INCLUDE	INCLUDE	INCLUDE
Hired	INCLUDE		INCLUDE	INCLUDE	INCLUDE	INCLUDE	INCLUDE
Non-Owned	INCLUDE		INCLUDE	INCLUDE	INCLUDE	INCLUDE	INCLUDE
Excess/Umbrella Liab.	\$5,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$5,000,000	\$1,000,000
Worker's Compensation & Employer's Liability	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY
Disability Benefits	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY	STATUTORY
Professional Liability			\$5,000,000				
Erie County To Be Named Add'l Insd.	Gen. Liab., Auto Liab., & Excess	Broad Form Vendors May Be Required	Gen. Liab., Auto Liab., & Excess	Gen. Liab., Auto Liab., & Excess	Gen. Liab., Auto Liab., & Excess	Gen. Liab., Auto Liab., & Excess	Gen. Liab., Auto Liab., & Excess

- V. Construction contracts require excess Umbrella Liability limits of \$5,000,000.
- VI. Coverage must be provided on a primary-non contributory bases.
- VII. Designated Construction Project General Aggregate Limit Per Location Endorsement CG 25 03 is Required.
- VIII. In the event the concessionaire is required to have a N.Y.S. license to dispense alcoholic beverages an endorsement for liquor liability is required.
- IX. Transportation of people in buses, vans or station wagons requires \$5,000,000 excess liability.
- X. Workers Compensation: State Workers' Compensation Board form DB-155 is required for proof of compliance with the New York State Disability Benefits Law.  
Locations of operation shall be "All locations in Erie County, New York."

For those entities who request permits, licenses, or contracts are required to provide either an Affidavit of Exemption (BP-1) or Certificate of Insurance 105.2, Certificate of Self Insurance SI-12, DB-155, or a Certificate of Attestation CE-200 to evidence exemption of coverage by statute. It will be necessary to require alternate coverage and limits which will be defined in the bid specifications, contract, lease or agreement. The alternative specifications should be evidenced on the certificate in lieu of the standards printed above.

- XI. The "ACORD" form certificate may be used in place of the County of Erie Standard Insurance Certificate, provided that all of the above referenced requirements are incorporated into the "ACORD" form certificate.

## **PROPOSAL REQUIREMENTS**

In order for Proposers to be considered for an award, the terms, conditions, and instructions contained in this RFP and attachments must be met. Any proposals which do not meet these criteria may be considered non-responsive.

Your proposal must be comprised of 3 sections, presented as separate documents:

- Appendix A
  - Proposal to Provide Service
  - Signed Schedule A
- Appendix B
  - Signed Fiscal Form
  - Budget Form ("RFP Fiscal Calculations")
- Appendix C
  - Most recent Audit report prepared by an independent CPA
  - Most recent Management Letter
  - Listing of Officers and Board of Directors
  - Copies of the IRS federal tax exemption determination letters.
- If not available, the latest tax return may be submitted in lieu of the audit report and/or management letter.

Submission of the proposals shall be sent as three separate documents (Appendix A, B and C) to: Talisa King at [Talisa.king@erie.gov](mailto:Talisa.king@erie.gov).

Electronic versions of Appendix A and B are available on the Erie County Purchasing website at: <https://www3.erie.gov/purchasing/requests-proposals-construction-bids>

By application, you certify that your agency can provide the following documentation at any time during the course of the selection process.

- Agency's most recent organizational chart and a letter of support signed by the CEO and the Board President.
- Resumes for all program staff, including administrators, program supervisors, direct service staff and aides.
- References or letters of testimony from other agencies for whom you have provided this or a similar service, with contact information.

Applications are expected to comply with stated guidelines including but not limited to desired program outcomes identified in the Request for Proposal (RFP). It will be the responsibility of the applicant to submit proposals consistent with the RFP requirements. By submitting an application, your agency asserts that the Request for Proposal document has been reviewed in its entirety and that, if selected, the agency will abide by the conditions for funding set forth therein.



## RFP Appendix A: Proposal to Provide Service

Department of Social Services

RFP #2025-034VF

**All fields must be completed. If not applicable, list "N/A". Incomplete proposals may be considered non-responsive.**

### AGENCY INFORMATION

<b>Agency Name</b> - List the official name of your organization.
<b>Agency Name</b> -List other name if used.
<b>Telephone Number</b> - List the main contact number for your agency.
<b>Address</b> - List the official mailing address of your agency; include city and ZIP code information.
<b>Website</b> - Provide your agency's website address (if applicable).
<b>Leadership</b> - List the name of your agency's Chief Executive Officer, Executive Director, or President.
<b>E-mail</b> - Provide the e-mail address for your agency's leader.
<b>Federal Employer ID# (FEIN)</b> - Please provide your agency's Employer Identification Number.
<b>DUNS #</b> - List your DUNS (data universal number system) Number assigned by Dun & Bradstreet, if applicable.
<b>501(c)(3) not-for-profit entity ID #</b> - If non-profit, please provide 501(c)(3) not-for-profit entity ID # and date established as such.
<b>MBE/WBE</b> - Indicate whether your agency is a Certified Minority Business Enterprise/ Women's Business Enterprise (MBE/WBE).
<b>Veteran-Owned Business</b> - Indicate whether your agency is a Veteran-Owned Business.
<b>Erie County Employees</b> - Name, title, and department of any employee or officer who was an employee or officer of Erie County within the 12 months immediately prior to the proposal.
<b>Subcontractors</b> - List all subcontractors that your agency does business with related to this service.

### CONTACT PERSON INFORMATION

<b>Name</b> - Please list the name of the person who should be contacted regarding your proposal.
<b>Telephone Number</b> - Please list the phone number of the person who should be contacted regarding your proposal.
<b>E-mail</b> - Please provide the e-mail address for the person to be contacted regarding your proposal.



## **RFP Appendix A: Proposal to Provide Service**

Department of Social Services

RFP #2025-034VF

### **APPENDIX A: TECHNICAL AND ORGANIZATION**

- I. Organization's background. (1 page)
- II. A summary of the organization's mission, goals, history, programs, major accomplishments and challenges. (1 page)
- III. Project Description (5-10 pages)
  - Briefly describe the proposed project.
  - Explain the significance of the project.
  - Describe the expected outcomes and the indicators of those outcomes.
  - Describe who and how will benefit from the project. (Please include percentage urban, suburban and rural.)
  - Outline the strategy and timeline to be used in the development and implementation of the project.
  - Describe how this project aligns with Live Well Erie priority areas and priority areas.
  - Describe how the project will be evaluated.
- IV. Recommended attachment(s):
  - Letter(s) of support from Erie County Department Heads and/or Erie County Legislators.



**SCHEDULE A**  
**PROPOSER CERTIFICATION**

The undersigned agrees and understands that this proposal and all attachments, additional information, etc. submitted herewith constitute merely an offer to negotiate with the County of Erie (the "County") and is NOT A BID. Submission of this proposal, attachments, and additional information shall not obligate or entitle the proposing entity to enter into a service agreement with the County for the required services. The undersigned agrees and understands that the County is not obligated to respond to this proposal nor is it legally bound in any manner whatsoever by the submission of same. Further, the undersigned agrees and understands that any and all proposals and negotiations shall not be binding or valid against the County, its directors, officers, employees, or agents unless an agreement is signed by a duly authorized County officer and, if necessary, approved by the Erie County Legislature, the Office of the County Attorney and/or the Erie County Fiscal Stability Authority.

It is understood and agreed that the County reserves the right to reject consideration of any and all proposals including, but not limited to, proposals which are conditional or incomplete. It is further understood and agreed that the County reserves all rights specified in the Request for Proposals (RFP).

It is understood and agreed that the undersigned, prior to entering into an agreement with Erie County, will properly execute the County of Erie Standard Insurance Certificate (example on pp. [ ] of this RFP), and that it will be complete and acceptable to Erie County.

It is represented and warranted by those submitting this proposal that except as disclosed in the proposal, no officer or employee of the County is directly or indirectly a party to or in any other manner interested in this proposal or any subsequent service agreement that may be entered into.

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*Proposer Agency Name*

By:

---

*Signature*

---

*Name and Title*



**RFP Appendix B: Fiscal**  
Department of Social Services  
RFP #2025-034VF

**FINANCIAL INFORMATION**

Payee Name of Agency (if different than Legal Name)
Financial Contact Person Name/Title
Street Address/City/State/Zip
Agency's Fiscal Year (Start date - End date)
Amount of Funding Request to ECDSS for this proposed contract
FY of Request (Start date - End date)

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**UNIT COST**

Unit of Service for this proposal (eg: hour):	
Number of units to be served	
Cost per unit of service for this proposal:	

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**CERTIFICATION**

The undersigned certifies that he or she is a principal officer of the applicant agency and has knowledge of, and certifies that the information contained herein is complete and accurate.

Furthermore, the undersigned certifies that the applicant sponsored programs, services and activities are available to the general public, advertised as such, and not subject to discrimination based on sex, race, creed, religion or national heritage.

---

**SIGNATURE**

---

**DATE**

---

**NAME/TITLE**



**RFP Appendix B: Fiscal**  
Department of Social Services  
**PROJECT BUDGET**  
RFP #2025-034VF

**Appendix B - RFP Fiscal Calculations**

AGENCY: \_\_\_\_\_

FUNDING PERIOD: \_\_\_\_\_

RFP # and NAME: \_\_\_\_\_

- The Budget Calculation pages request information in the following tables:
- 1) Summary Funding Request
  - 2) Direct Program Expense Budget - County Funded
  - 3) Administrative Overhead - County Funded
  - 4) Agency In-Kind or Indirect Service Contributions
  - 5) Revenue
  - 6) Staffing Review - Program Related County Funded
  - 7) Staffing Review - Administrative County Funded

Indicate in the following budget tables estimated program and administrative expense and revenue for the proposed fiscal year. Comparative current year funding information should be included if the agency is requesting a continuation of a program funded currently by the Department of Social Services.

**1) SUMMARY FUNDING REQUEST**

SUMMARY PROGRAM COST AND REVENUE	Current Contract	Proposed Budget
Total Direct Program Operating Expense		
Total Administrative Overhead Expense		
TOTAL COUNTY FUNDED PROGRAM EXPENDITURES		
In-Kind Agency Expenditures		
TOTAL PROGRAM EXPENDITURES		
REVENUE	Current Contract	Proposed Budget
County Funding		
Agency In-Kind Revenue		
TOTAL REVENUE (Should match total Program Expense)		

Agency In-Kind Revenue as % of Total Revenue		
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## Appendix B - RFP Fiscal Calculations

### 2) DIRECT PROGRAM EXPENSE BUDGET - County Funded

Indicate all expense items related to the direct provision of program services, including only cash expenditures that will be provided with County funds. Do not include Agency in-kind contributions.

DIRECT PROGRAM EXPENSE - County Funded	Current Contract	Proposed Budget
<b>Direct Program Staffing (from Staffing Table 6)</b>		
Total Salaries, Wages		
Total Fringe Benefits		
<b>Subtotal Salary and Fringe Benefits</b>		
<b>Direct Operating Expense:</b>		
Employee travel/mileage		
General program related supplies		
Postage		
Maintenance and repairs		
Phones		
Utilities		
Insurance (directly related to program)		
Lease/Rent Vehicle		
Equipment: (List items)		
Contracted Client Services: (List contracts)		
Contracted Services Not Client Related (List contracts)		
Other:		
<b>Subtotal Direct Operating Expense</b>		
<b>TOTAL DIRECT PROGRAM COSTS</b>		

## Appendix B - RFP Fiscal Calculations

### 3) ADMINISTRATIVE OVERHEAD - County Funded

County funded Administrative Overhead cannot exceed 15% of the total Direct Service Program Budget and must be consistent with the requirements of NYS Executive Order 38.

Administrative Overhead - County Funded	Current Contract	Proposed Budget
<b>Personal Services (From Staffing Table 7)</b>		
Total Salaries, Wages		
Total Fringe Benefits		
<b>Subtotal Administrative Salary and Fringe Benefits</b>		
<b>Administrative Operating Expense:</b>		
Please itemize below:		
Staff Development		
Public Relations		
Audit, Legal, Cons. Fees		
Dues, Licenses, Permits		
Other:		
<b>Subtotal Administrative Operating Expense</b>		
<b>Total Administrative Overhead</b>		
<b>Total Direct Program Costs (from table 2)</b>		
<b>Administrative Expense as Percent of Program Cost Not to Exceed 15%</b>		

## Appendix B - RFP Fiscal Calculations

### 4) AGENCY IN-KIND or INDIRECT SERVICE CONTRIBUTION

In-Kind donations, or indirect services, are defined as the provision of services by an agency for support of the program specified in this contract without charge to the county. Examples can be the use of space, equipment or the provision of staff time either program or administrative. The source of funds for these items may not be State, Federal or other County funded programs. In-Kind donations are not required but helps the Department of Social Services maximize revenue.

In-kind Donations (List type of in-kind or indirect service contributions specific to this proposal along with an estimated value)	Current Contract	Proposed Budget
Total In-Kind		

### 5) REVENUE

Detail below all revenue sources directly related to the total proposed program.

Revenue	Current Contract	Proposed Budget
Total Funds Requested from the County		
Source of Agency In-Kind services:		
Total Revenue		

## Appendix B - RFP Fiscal Calculations

### 6) STAFFING REVIEW PROGRAM RELATED - COUNTY FUNDED

In the following columns list all proposed direct program related staff. Indicate full or part time employees and the percent of time involved in the proposal. Comparative prior year staffing levels should be included if the agency is requesting a continuation of a program previously funded by the Department of Social Services.

Direct Program Related Staffing	Current Contract				Proposed Contract			
	# of Staff	% of Time	Annual Salary	Total Current Budget	# of Staff	% of Time	Annual Salary	Total Proposed Budget
Full Time Position Title:								
Part Time Position Title:								
	Total Salary:							
Direct Program Related Fringe	Rate			Total Current Budget	Rate			Total Proposed Budget
FICA								
Pension/Retirement								
Workers' Comp.								
State Disability Insurance								
Life Insurance								
Health Insurance								
Other:								
Total Fringe Benefit Cost:								
Fringe Benefits as percent of total salary:								
Please attach fringe benefit rate sheet and explanation if total fringe exceeds 35%								

## Appendix B - RFP Fiscal Calculations

### 7) STAFFING REVIEW ADMINISTRATIVE - COUNTY FUNDED

In the following columns list all administrative staff. Indicate full or part time employees. Include all Full and Part-Time Executive, Administrative Support and Clerical Staff who do not provide direct client service and service supervision. Comparative current year staffing levels should be included if the agency is requesting a continuation of a program previously funded by the Department of Social Services.

Administrative Staffing Detail	Current Contract				Proposed Contract			
	# of Staff	% of Time	Annual Salary	Total Current Budget	# of Staff	% of Time	Annual Salary	Total Proposed Budget
Full Time Position Title:								
Part Time Position Title:								
Total Salary:								
Administrative Fringe	Rate			Total Current Budget	Rate			Total Proposed Budget
FICA								
Pension/Retirement								
Workers' Comp.								
State Disability Insurance								
Life Insurance								
Health Insurance								
Other:								
Total Fringe Benefit Cost:								
Fringe Benefits as percent of total salary:								
Please attach fringe benefit rate sheet and detailed explanations if total fringe exceeds 35% of salary.								





## **RFP Appendix C: Supplementary Application Information**

Department of Social Services

PROJECT BUDGET

RFP #2025-034VF

### **SUPPLEMENTARY APPLICATION INFORMATION**

Provide a separate envelope or folder which includes one copy of the most current information as noted below. These materials cannot be returned.

- ☐ Most recent Audit report prepared by an independent CPA
- ☐ Listing of Officers and Board of Directors
- ☐ Most recent Management Letter
- ☐ Copies of the IRS federal tax exemption determination letters.

\*If not available, the latest tax return may be submitted in lieu of the audit report and/or management letter.