FAMILY ELDERCARE — RFP ADDENDUM NO. 1

Issued By	Key Dates	
Family Eldercare 1700 Rutherford Lane, Austin, TX 78754 www.familyeldercare.org	Addendum issued: Vendor questions due: Proposals due: Anticipated contract start:	September 17, 2026 September 22, 2026 October 23, 2026, 5:00 PM CT February 1, 2027

Purpose

Family Eldercare ("the Organization") issues this addendum in response to written questions received regarding the Request for Proposals ("RFP") Section 4: *Minimum Vendor Qualifications*. It aims to:

- Clarify how the Minimum Vendor Qualifications are applied (§1):
  a. to the responding legal entity, including time operating under a predecessor entity and the operating history of a franchisee (§1.1);
  b. in a prime and subcontractor arrangement—including which qualifications the prime must meet independently, and terms covering on-site capability, disclosure and substitution, the portions of the RFP Section 3 scope a subcontractor may perform, and subcontractor requirements (§1.2);
  c. where a respondent offers alternative evidence of organizational or delivery-team experience, and how the corporate experience and client references of a disclosed teaming partner are treated for scoring (§1.3); and
  d. to subcontracts, to which the federal requirements identified in Section 10 of the RFP apply (§1.4);
- Insert a measurement date, not stated in the original solicitation, by which years in operation are determined (§2); and
- Specify requirements on personnel location and remote administrative access that the original solicitation did not address (§3).

All other terms and conditions of the original RFP remain in full force and effect; except as expressly stated herein, this addendum does not alter the scope of services, the evaluation criteria, the pricing requirements, or the procurement schedule.

Respondents must acknowledge receipt of this and any subsequent addenda in their proposal.

1. Application of the Minimum Vendor Qualifications

1.1 Application to the Responding Legal Entity

The RFP Section 4 requirement of three (3) years of continuous operation addresses continuity of the operating business rather than continuity of a legal entity name. Accordingly:

- **Predecessor entities:** Time operating under a predecessor entity, a prior trade name, or pre-acquisition ownership counts toward the three years *where the same operational business and personnel continued without interruption*.
- **Disclosure:** A respondent relying on predecessor time must describe the relationship and the continuity of operations in its Company Overview under RFP Section 5.
- **Franchisees:** A franchisee respondent counts its own operating history at the local level. The operating history of a franchisor or of other franchisees does not count toward the requirement.

1.2 Teaming, Subcontracting, and On-Site Capability

Prime and subcontractor arrangements are permitted: a firm that does not independently meet the requirements of RFP Section 4 may participate in this engagement as a subcontractor to a prime respondent that does. **The qualifications of a teaming partner or subcontractor are not attributed to the prime.** RFP Section 4 is applied to the prime respondent, which must independently meet each minimum qualification—except On-site Capability, as provided below—and which remains solely responsible to the Organization for all performance and obligations under the resulting agreement, including work performed by a subcontractor. The prime is the signatory to the Organization's HIPAA Business Associate Agreement, and the three (3) client references required under RFP Section 5 must be clients the prime respondent itself has served within the last three years. A respondent that does not independently meet the three (3) year requirement in RFP Section 4 as of the measurement date in Section 2 of this addendum is not a responsive prime respondent, regardless of the experience of its proposed team.

On-site Capability: A respondent may meet the On-site Capability qualification through a named Austin-area subcontractor identified in the proposal; the prime remains accountable for the response times in RFP Section 3.3.

Disclosure and Substitution: Proposals must identify, in the Company Overview under RFP Section 5, each proposed subcontractor, the scope of work it will perform stated at the task level, and the location from which that work will be performed. The Organization's written consent is required before a subcontractor's scope is added to or expanded after award. Before substituting that subcontractor, the prime must provide written notice, identify a replacement of equal or greater capability, and obtain the Organization's written consent, which will not be unreasonably withheld.

Scope of subcontracted work: A disclosed subcontractor may perform portions of on-site support, Tier 3 escalation, network and server administration, cybersecurity monitoring and incident response, backup and disaster recovery, and transition services. The prime must nonetheless perform a material portion of the RFP Section 3 services with its own personnel, including the account-management and escalation functions in RFP Section 3.1; a proposal in which the prime serves principally as a contracting intermediary for another firm's delivery organization does not meet the requirements of RFP Section 4 and will be found nonresponsive.

Subcontractor requirements: A subcontractor is not required to register with SAM.gov or to execute the Organization's Business Associate Agreement directly. Each subcontractor must, however:

- Not be suspended, debarred, or otherwise excluded from participation in federal awards, as required by 2 CFR Part 180 and Section 4 of the RFP; the prime must verify each subcontractor's status against the SAM.gov exclusions list before the subcontractor performs any work under this engagement and at each contract anniversary thereafter;
- Be covered by the prime's Commercial General Liability and Cyber Liability/Errors & Omissions insurance, which must extend to work performed by subcontractors and is evidenced by the prime's certificates (the Organization will not require separate certificates from subcontractors), and carry Workers' Compensation coverage as required by Texas law where it employs personnel on this engagement;
- Comply with the criminal background screening requirement in RFP Section 4, which applies to every individual assigned to this engagement regardless of employer; and
- Execute a HIPAA-compliant subcontractor Business Associate Agreement with the prime where its personnel may create, receive, maintain, or transmit protected health information, a copy of which must be furnished to the Organization on request.

1.3 Alternative Evidence of Organizational or Delivery-Team Experience

Family Eldercare will not accept alternative evidence in substitution for the three (3) years of continuous operation required by RFP Section 4. The requirement addresses attributes of the responding firm itself—financial and operational continuity across a multi-year contract term, insurance renewal history, and the capacity to return data and administrative credentials in an orderly manner at the conclusion of the engagement—which individual or team experience acquired at other organizations does not establish. Neither that threshold nor the client reference requirement may rest on a subcontractor or teaming partner, per Section 1.2 of this addendum.

Relevant experience nonetheless carries weight: the experience of a respondent's principals and personnel, and the corporate experience and client references of a disclosed teaming partner, are each evaluated under the scored criteria for *Technical capabilities and service levels*, *Cybersecurity, privacy, and compliance safeguards*, *Nonprofit and co-managed experience*, and *Transition and onboarding plan*, provided the proposal identifies the entity or individual that performed the work and the role it will hold on this engagement. Respondents are encouraged to present that experience as a supplement to, rather than a substitute for, the prime's own qualifications and references.

1.4 Federal Flow-Down Requirements

This procurement is funded in part by federal grant funds, and the provisions of 2 CFR Part 200, Appendix II identified in RFP Section 10 of the RFP apply to subcontracts at every tier. The prime must include in each subcontract for work under this engagement the Equal Employment Opportunity, debarment and suspension, and records retention and access provisions identified in the RFP Section 10, the Byrd Anti-Lobbying certification where the subcontract exceeds $100,000, and the prohibition on obligating funds for covered telecommunications equipment or services in 2 CFR 200.216. Each subcontractor must make its records relating to this engagement available to the Organization, its federal awarding agencies and pass-through entities, and their respective auditors on the same terms as the prime. Where subcontracted work is allocated to the Lyons Gardens network administration line item required under Section 3.5 of the RFP, the respondent's pricing must identify the subcontracted component separately so that allocated costs remain auditable.

2. Measurement Date for Years in Operation

The RFP Section 4 requires a minimum of three (3) years of continuous operation as a managed service provider but does not state the date on which that period is measured. Minimum vendor qualifications are conditions of responsiveness and are therefore determined as of the submission deadline, not as of the anticipated contract commencement date.

Therefore, the RFP Section 4 is amended to read, in relevant part:

> **Years in Operation:** at minimum three (3) years of continuous operation as a managed service provider, measured as of the proposal submission deadline stated in Section 9.

As of the publication of this addendum, the proposal submission deadline remains as initially posted: October 23, 2026, 5:00 PM Central Time; thus, prime respondents must have operated continuously as a managed service provider since on or before October 23, 2023—including qualifying predecessor time under Section 1.1 of this addendum—to qualify for response under this requirement.

3. Personnel Location and Remote Administrative Access

The RFP does not address the geographic location of vendor personnel or the origin of remote administrative access. The following requirements are added and apply to the prime, to each subcontractor, and to all personnel of either who hold or exercise administrative access to Organization systems, including personnel performing supplemental help desk services under the RFP Section 3.2.

United States access requirement: All remote administrative access to Organization systems must originate from within the United States, and personnel holding standing administrative access must be based in the United States. No geographic proximity to Austin is required beyond the On-site Capability qualification outlined in the RFP Section 4.

Scope of administrative access: For this purpose, administrative access includes password and multi-factor authentication resets, account creation and modification, endpoint and server administration, network and firewall administration, and any access to the credential repository required under the RFP Section 3.1. Respondents should note that password resets in the Organization's hybrid identity environment constitute administrative access.

Continuity of coverage: Respondents must maintain sufficient United States-based staffing to meet the response times in the RFP Section 3.3 and the escalation obligations in the RFP Section 3.1 at all times. Travel or absence of individual personnel does not excuse performance.

Temporary travel exception: Where a named individual requires administrative access while temporarily outside the United States, the prime must request written approval in advance, identifying the individual, the dates of travel, the country, and the business reason. Approval is at the Organization's sole discretion. Absent written approval, that individual's administrative access must be suspended for the duration of the travel.

Disclosure and attestation: Proposals must state, in the Approach to Co-Managed Service Delivery required by the RFP Section 5, each country from which services under this engagement will be performed—including help desk, monitoring, and subcontracted work—and must attest that remote administrative access will originate solely from within the United States.