

REQUEST FOR QUALIFICATIONS

**FOR AN EXPERIENCED RESOURCE COORDINATOR/CASE
MANAGER TO ASSIST IN THE DELIVERY OF AGING SERVICES
FOR OLDER ADULTS**

**R F Q
SLAA-2010-1**

**Santee-Lynches Regional Council of Governments
Area Agency on Aging
36 West Liberty Street, P.O. Box 1837
Sumter, SC 29151**

**SANTEE-LYNCHES
REGIONAL COUNCIL OF GOVERNMENTS
AREA AGENCY ON AGING
Sumter, SC 29151**

**2010
FOR QUALIFICATIONS**

**For
Experienced Resource Coordinator/Case Manager to assist in the
delivery of aging services to older adults**

ISSUE DATE: March 8, 2010

REQUEST FOR PROPOSAL #: SLRCOG/AAA 2009-2

**BUYER: Santee-Lynches Regional Council of
Governments/Area Agency on Aging
36 West Liberty Street
Post Office Box 1837
Sumter, SC 29151**

TELEPHONE: (803) 775-7381

You are invited to submit a Proposal in accordance with the requirements of the solicitation contained herein. Because the Contract that may result from this solicitation is funded through a combination of Federal, State, and local funding sources, some uncertainty exists with respect to what level of funding may ultimately be made available to Offerers.

This solicitation does not commit the Santee-Lynches Regional Council of Governments (SLRCOG) or the Santee-Lynches Area Agency on Aging (SLAAA) to award a Contract, to pay the costs incurred in the preparation of a Proposal in response to this request, or to procure or contract for the articles of goods or services. The SLRCOG and/or the SLAAA reserve the right to accept or reject any or all Proposals received as a result of this Request for Qualifications, to negotiate with all qualified Offerers, or to cancel in part or in whole this Request, if it is deemed in the best interest of the SLRCOG/SLAAA to do so.

James T. Darby, Jr.
Executive Director
Santee-Lynches Regional Council of Governments

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I. GENERAL INFORMATION

A) KEY EVENTS

ACTIVITY	DATE	TIME
R F Q Advertised :	March 6, 2010	
R F Q Released:	March 8, 2010	
Deadline for Proposals:	March 26, 2010	12:00 P.M., EST
Anticipated completion date for Evaluation of Proposals:	April 12, 2010	
Anticipated date for posting of Awards:	April 13, 2010	
Effective date of Contract:	July 1, 2010	

B) DELIVERY OF PROPOSALS

One (1) typed, emailed, or faxed copy of the Proposal is required. Proposals in response to this RFO will be received by SLRCOG/AAA until 12:00 P.M. on Friday, March 26, 2010 regardless of delivery method. Proposals submitted after this time **will not** be considered for award in accordance with Santee-Lynches Regional Council of Governments and Santee-Lynches Area Agency on Aging Procurement Policy.

- Proposals may be mailed to: Santee-Lynches Regional Council of Governments
Area Agency on Aging
Post Office Box 1837, Sumter, SC 29151
- Hand Carried / Express Mailed to: Santee-Lynches Regional Council of Governments
Area Agency on Aging
36 West Liberty Street, Sumter, SC 29151
- Faxed: 803-773-9903
- Email: slaging@slcog.org

II. INTRODUCTION and BACKGROUND

The Santee-Lynches Regional Council of Governments Area Agency on Aging (SLRCOG/AAA), is the designated Area Agency on Aging serving the four (4) counties of Clarendon, Kershaw, Lee, and Sumter. In our efforts to provide quality services to seniors in Clarendon County, a Request for Qualifications (RFQ) is available to all Offerers who are interested in providing contracted services to SLRCOG/AAA for: resource coordination, case management, providing information concerning the availability of services, eligibility of services, and instructions on how to access those services in Clarendon County, SC.

The Resource Coordinator/Case Manager will primarily coordinate and facilitate access to supportive services and linkage to the communities' public and private resources. The need for these services are based on an individual's assessed needs and the development of a comprehensive service plan.

The Santee-Lynches Regional Council of Governments Area Agency on Aging (SLRCOG/AAA) is primarily looking for an all inclusive proposal that provides a cost analysis associated with case management per caseload. Cost should include, but is not limited to assessments, planning, monitoring, advocacy, time spent coordinating with other agencies and mileage accrued to perform case management functions.

III. SCOPE OF WORKS

PURPOSE:

To ensure that clients receive appropriate services through a process of comprehensive, ongoing assessment and coordination of resources.

ELIGIBLE PARTICIPANTS:

1. Persons age 60 or older who are at high risk of inappropriate institutionalization or loss of independence or loss of function (frail).
2. Persons age 60 or older who needs multiple in-home services to address their needs
3. Persons age 60 or older who have with highly complicated situations/needs/problems (vulnerable)

SERVICE ACTIVITIES:

The Contractor shall have the capacity for providing the following service activities:

1. Comprehensive face-to-face assessment of client needs.
2. Development of service plans and periodic updates.
3. Coordination of services received from multiple providers.
4. Ongoing monitoring of client's condition, face-to-face reassessment and changes in services as warranted.
5. Provide instructions on how to access services.

CONTRACT STANDARDS:

If awarded a contract, the Contractor shall comply with all requirements and standards set forth within the contract.

SERVICE ELIGIBILITY:

The Contractor shall prioritize prospective clients. Preference shall be given to:

- Those with little or no local family support
- Those at greatest risk of premature institutionalization
- Those in greatest economic need and/or living in rural areas

DOCUMENTATION

The Contractor shall comply with the following documentation requirements:

1. The contractor shall make information available in the format specified by the SLAAA that documents compliance with commitments made in the proposal.
2. The Contractor shall make available all data necessary for the SLAAA to enter information into a state-approved data collection system on the schedule provided by SLAAA.
3. Maintain at a central site documentation of initial assessments, priority ranking, on-going and annual information updates, nutrition risk

assessment, service plans and all other applicable case management information.

4. Provide the following service documentation: (a) records of daily contacts and documentation of daily follow-up; (b) records regarding number of appointments; (c) documentation of service management activities including an individual client file containing pre-screening data, completed client assessment, client consent for release of information, service plans, referral documents, on-going progress notes, re-assessments, and termination records when applicable.
5. Provide documentation of care management activities to support reimbursement requests.
6. Meet all reporting requirements of the State Unit on Aging and the Area Agency on Aging.
7. Maintain written waiting list for service.

IV. EVALUATION CRITERIA

The SLRCOG/AAA will take into consideration the following information in determining acceptance and approval of Proposals:

1. Qualifications

- a) Describe/explain your background, experience and training that enables you to perform case management functions.
- b) Describe/explain how you will ensure compliance with requirements outlined in the Scope of Work.
- c) Describe/explain any applicable licenses/accreditation that you obtained.
- d) Explain any experience you have with Medicare Part D, SHIP or I-CARE.

2. Past Experience/Past Performance

- a) Are you currently providing case management? Yes____ No____ If yes, please provide a narrative overview of programming including number of clients.
- b) Describe your experience in working with federal and/or state government funding sources.
- c) Identify any experience in providing human service programs or services to low income individuals, seniors, people with disabilities, people in rural areas, or people with low English proficiency.
- d) Provide at least three references/ letters of recommendation.

3. Service Delivery Plan

- a) List the methods to be used to assess the needs of individual clients, provide counseling, update and review the service strategy and provide services to the most in need.
- b) Currently the Santee-Lynches AAA has a waiting list of seniors in need of the services. List methods you will use to assess and prioritize the needs of current program participants as well as individuals on the waiting list.
- c) How will you respond to participants' requests for change(s) in the service?
- d) Describe how you will provide follow-up to clients receiving this service.

4. Cost

The Santee-Lynches Regional Council of Governments Area Agency on Aging (SLRCOG/AAA) is primarily looking for an all inclusive proposal that provides a cost analysis associated with case management per caseload. Cost should include, but is not limited to assessments, planning, monitoring, advocacy, time spent coordinating with other agencies and mileage accrued to perform case management functions. Negotiated cost will be an all-inclusive rate; i.e., mileage, meals or other incidentals will not be reimbursed separately.

Note: There are approximately 230 seniors currently receiving services (group dining, home delivered meals, transportation, home care, health promotions) through the Older Americans Act in Clarendon County. Depending on the needs of the senior, some seniors may require more contact than others (see below). Seniors may be added or terminated based on needs or funding availability. Also keep in mind that seniors may require referral services other than those identified above.

Seniors (230)	Frequent Visits Required	Infrequent Visits Required
Homebound	40%	60%
Not Homebound	20%	80%

Case Management Evaluation Criteria		Max Score	% of Service Total	Reference(s)/Comments
1	Qualifications	125	31%	
a	Background, experience and training	50		
b	Compliance with Scope of Work	25		
c	Applicable licenses/accreditation	25		
d	Medicare Part D, SHIP, I-CARE experience	25		
2	Experience/Past Performance	100	25%	
a	Currently providing the service	25		
b	Experience working with government etc.	25		
c	Experience with human services programs	10		
d	References/Recommendations	40		
3	Service Delivery Plan	100	25%	
a	Assessment methodology	25		
b	Waiting list methodology	25		
c	Request for change	25		
d	Follow-up	25		
4	Cost	75	19%	
	Total cost for case management	75		
Maximum Points		400	100%	

IV. SPECIAL INSTRUCTIONS AND CONDITIONS

A. TERMS OF CONTRACT

The terms of this Contract Agreement shall be for the period beginning July 1 2010, and continuing through June 30, 2011. The SLRCOG/AAA may, at its option, extend its Contract Agreement for up to twelve (12) months if it appears to be in the best interest of the SLRCOG/AAA and is agreeable with the selected Offerer. The specific Offerer will be notified in writing at least three (3) days prior to the expiration of the then current Contract Agreement as to the AAA's preliminary intent to exercise this option. Any request for an increase in the rate for the Contract extension period will be evaluated prior to exercise of the option to extend and will be based on the availability of funds, evidence of need for increase and the consumer price index (inflation adjustment) at the time of renegotiation.

B. POLICY OF COMPETITION

The SLRCOG/AAA staff conducts all procurement transactions in a manner providing full and open competition. This Request for Qualifications identifies all evaluation criteria and their relative importance. Technical evaluations will be made of all Proposals received. Awards will be made to the most responsive and responsible Offerers whose Proposal is most advantageous to the need of the Santee-Lynches Region.

C. RESPONSIVENESS OF PROPOSAL

1. Any Proposal received after the time and date indicated in Section I Sub-Part B will not be reviewed. The SLRCOG/AAA staff will document the date and time of receipt of all proposals.
2. Any Proposal that is submitted without supporting documentation will not be reviewed.
3. Proposals will be reviewed solely on the basis of the material they contain. No modifications, alterations, additions, or substitutions to any Proposal will be accepted from Offerers after the closing date indicated in Section I Sub-Part A.

The Offerer releases the Santee-Lynches Regional Council of Governments, Area Agency on Aging, of all liability associated with any injuries or accidents which may occur during the lease period.

D. CASE MANAGEMENT PROPOSAL REQUIREMENTS (Include)

Offerers must include a copy of current SLED background check.

E. Eligible Offerers

Any governmental, non-profit, individual or private for-profit organization may apply. Nothing herein is intended, or should be construed, to limit competition, but instead is for the purpose of meeting the needs of older adults in the Santee-Lynches Region using a fair, impartial, and open competition. It is the intent and purpose of the SLAAA that this RFQ permit and encourage competition.

F. Type of Contract to be Issued

A contract with a fixed reimbursement rate will be used. Reimbursement rate will include those areas outlined in Section IV Sub-Part 4.

G. Documentation, Reporting, and Accounting

The Offerer shall compile and maintain a record of each case management visit and will submit it to SLRCOG/AAA for reimbursement.

H. References

A minimum of three (3) business/personal references familiar with Offerer must be provided, including a Contact person, address, and daytime telephone number of each.

I. Right of Rejection

The SLRCOG/AAA has the right to accept or reject any or all Proposals received as the result of this RFQ.

J. Open Records

All Proposals shall become public documents of SLRCOG/AAA and shall be open for review by the Public. If any Offerer submits any information that is considered to be proprietary or confidential, so label it on each page so that proper privacy and confidentiality can be maintained.

K. Sub-Contracts

Sub-contracting for purposes of providing additional services or to promote coordination of service delivery must be approved by SLRCOG/AAA prior to executing.

L. Award Criteria

SLRCOG/AAA will award the contract to the reasonable and responsive party with the highest points indicated in the evaluation criteria.