



Santee-Lynches Regional Council of Governments
Santee-Lynches Area Agency on Aging

Veteran-Directed Care Assessment and Options Counseling Services

Request for Proposals

RFP #2026-002

Proposal Due Date and Time: October 30, 2026 @ 12:00PM

Submit Proposals To: 3219 Broad Street, Sumter, SC 29150

ACKNOWLEDGEMENT OF CONDITIONS

for RFP #2026-002

PROJECT: Veteran-Directed Care Assessment and Options Counseling Services

REQUIREMENTS: ENCLOSED

SCOPE OF WORK: Veteran-Directed Care (VDC) assessment, options counseling, intake, enrollment-support, and related participant-centered services.

QUESTION DEADLINE: ANY QUESTIONS MUST BE RECEIVED BY
October 15, 2026 @ 12:00PM
QUESTIONS MUST BE DIRECTED IN WRITING TO:
elevy@slcog.org

RFP SUBMISSION: SANTEE-LYNCHES REGIONAL COUNCIL OF GOVERNMENTS
PHYSICAL AND MAILING ADDRESS:
3219 BROAD STREET
SUMTER, SC 29150

OUTSIDE OF ENVELOPE MUST BE MARKED:
“RFP 2026-002 Veteran-Directed Care Assessment and Options Counseling Services”

BID SUBMISSION DEADLINE: October 30, 2026 @ 12:00PM

THE INFORMATION BELOW MUST BE FULLY COMPLETED AND SIGNED FOR A PROPOSAL TO BE VALID

By signing this Statement, I certify that we (firm) will comply with all requirements contained within the RFP.

AUTHORIZED SIGNATURE		PRINTED NAME		DATE
FULL LEGAL COMPANY NAME			DUNS NUMBER	
MAILING ADDRESS				
CITY	STATE	ZIP CODE	PHONE	
EMAIL				

1. Purpose

The Santee-Lynches Regional Council of Governments, through the Santee-Lynches Area Agency on Aging (“Santee-Lynches” or “SLRCOG”), is soliciting proposals from qualified firms, organizations, or independent contractors to provide **Veteran-Directed Care (VDC) assessment, options counseling, intake, enrollment-support, and related participant-centered services.**

The successful proposer will support Santee-Lynches in delivering timely, Veteran-centered, and compliant assessment services for eligible Veterans referred through the VDC program. Services must be performed in accordance with applicable requirements of the U.S. Department of Veterans Affairs (“VA”), Bay Aging, Santee-Lynches, and all applicable federal and state laws, regulations, policies, and confidentiality requirements. This RFP is intended to identify one or more qualified contractors capable of conducting assessments and completing required intake and enrollment documentation for Veterans participating in the VDC program within the Santee-Lynches service area.

2. Background

The Veteran-Directed Care program is designed to help eligible Veterans remain safely in their homes and communities rather than entering or remaining in institutional long-term care settings. The program provides Veterans with a flexible budget that may be used to hire workers—including family members, neighbors, or other individuals selected by the Veteran—to assist with personal care and activities of daily living.

VDC is a participant-directed model of care. Veterans, or their authorized representatives, have meaningful control over the selection and management of their caregivers and the use of their authorized service budget. The program relies on coordinated support from the VA, fiscal management entities, community-based providers, and options counselors to ensure that Veterans receive services in a manner that is safe, responsive, financially responsible, and consistent with program requirements.

Santee-Lynches currently participates in the VDC program through a collaboration agreement with Bay Aging. Under that agreement, Santee-Lynches provides options counseling and related support services for referred clients. These services include completing employer and employee packets, submitting required assessment packets for VA authorization, maintaining secure records, participating in training, providing backup coverage, conducting client satisfaction activities, and complying with all requirements of the underlying VA agreement and VDC policies and procedures.

The VA has identified programmatic competence, financial competence, implementation readiness, operational readiness, and sustained participant-directed service delivery as essential elements of a successful VDC program.

3. Service Area

Services will be provided within the VA Dorn area, including in-person services at Veterans’ homes, community locations, Santee-Lynches offices, and other approved locations as necessary.

The successful proposer must be able to provide services throughout the assigned service area and have the capacity to conduct home visits when required.

4. Scope of Services

The selected contractor shall provide assessment and options counseling services for Veterans referred to Santee-Lynches under the Veteran-Directed Care program. The contractor shall work collaboratively with Santee-Lynches staff and the VA, Veterans, caregivers, and other authorized program partners.

A. Referral Response and Scheduling

The contractor shall:

- Receive and acknowledge referrals from Santee-Lynches or its authorized VDC partner.
- Contact referred Veterans or their authorized representatives in a timely manner.
- Schedule assessment and enrollment meetings at a location convenient and appropriate for the Veteran.
- Conduct home visits when required to complete assessments, gather documentation, and support enrollment.

- Maintain communication with Santee-Lynches regarding referral status, scheduling barriers, incomplete documentation, and required follow-up.

B. Veteran Assessment and Options Counseling

The contractor shall:

- Conduct Veteran-centered assessments consistent with VDC program requirements, approved assessment tools, and applicable policies and procedures.
- Assess the Veteran's strengths, needs, preferences, natural supports, caregiving needs, and ability to direct services.
- Discuss available home- and community-based service options, including the participant-directed nature of the VDC program.
- Explain the roles and responsibilities of the Veteran, authorized representative, caregiver, options counselor, fiscal-management entity, Santee-Lynches, Bay Aging, and VA.
- Help the Veteran or authorized representative make informed decisions regarding services, caregivers, budget use, and ongoing participation.
- Identify barriers that could affect successful enrollment or continuation in the VDC program and communicate those barriers to Santee-Lynches promptly.
- Provide services in a manner that respects Veteran choice, dignity, independence, culture, privacy, and self-direction.

C. Employer and Employee Enrollment Packets

The contractor shall:

- Schedule and meet with referred Veterans and prospective caregivers to complete required employer and employee enrollment packets.
- Assist with the accurate completion of all forms and documents required to establish the Veteran or authorized representative as an employer entity and to enroll workers for payroll processing.
- Review submitted packets for completeness, accuracy, required signatures, and supporting documentation.
- Submit completed employer and employee packets to Santee-Lynches, as directed, in sufficient time to meet payroll-processing schedules.
- Maintain a tracking system for packet status, missing information, required corrections, and final submission.

D. VA Authorization Assessment Packets

The contractor shall:

- Complete all assessment packets and supporting documents required for VA review and authorization of VDC services.
- Ensure that assessment packets are complete, accurate, timely, and consistent with VDC policies and procedures.
- Assessment packets will need to be uploaded both electronically and mailed to Bay Aging with wet signatures within 2 weeks. Respond promptly to requests for clarification, corrections, additional information, or resubmission.
- Maintain documentation demonstrating the date of referral, date of contact, date of assessment, date of submission, and final disposition of each referral.

E. Ongoing Options Counseling and Participant Support

The contractor shall:

- Provide ongoing options counseling and support to enrolled Veterans as assigned.

- Assist Veterans and authorized representatives in understanding participant-directed services, employer responsibilities, caregiver selection, and use of the authorized budget.
- Help identify concerns related to caregiver availability, changing needs, budget utilization, worker documentation, or continuation of services.
- Coordinate with Santee-Lynches, Bay Aging, and authorized partners to resolve operational issues affecting the Veteran's services.
- Provide follow-up contact and reassessment support when requested or when a significant change in circumstances is identified.
- Conduct or assist with required participant satisfaction surveys and submit completed surveys to Santee-Lynches in the required format and timeframe.

F. Documentation, Data, and Reporting

The contractor shall:

- Maintain complete, accurate, current, and secure records of all assessment and options counseling activities.
- Document Veteran contacts, home visits, assessments, outcomes, referrals, services, barriers, and follow-up activities.
- Use program forms, systems, procedures, and reporting formats required by Santee-Lynches, Bay Aging, or the VA.
- Submit activity reports, invoice support documentation, program data, and other required reports on the schedule established by Santee-Lynches.
- Participate in quality-assurance reviews, file reviews, monitoring, corrective-action activities, and program-improvement efforts.
- Retain records for a minimum of ten years, or longer if required by applicable law, the underlying VA agreement, or Santee-Lynches policy.

G. Training and Coordination

The contractor shall:

- Participate in all required orientation, training, technical assistance, and staff-development activities.
- Maintain knowledge of VDC program requirements, participant-directed services, options counseling, confidentiality, fraud prevention, documentation, and applicable policies.
- Attend meetings requested by Santee-Lynches, Bay Aging, the VA, or other authorized program partners.
- Coordinate all external outreach, public communications, media materials, and public presentations related to the VDC program with Santee-Lynches in advance.
- Refrain from representing itself as an agent of Santee-Lynches, Bay Aging, or the VA unless expressly authorized in writing.

H. Backup Coverage

The contractor shall maintain sufficient staff capacity to provide continuity of services when an assigned assessor or options counselor is unavailable because of leave, illness, vacancy, workload, emergency, or other operational circumstances.

5. Required Qualifications

Proposers must demonstrate that they possess the organizational, professional, financial, and operational capacity necessary to provide high-quality VDC assessment and options counseling services.

At a minimum, the proposer must demonstrate:

- Experience providing assessments, case management, options counseling, social services, long-term services and supports, home- and community-based services, or participant-directed services.

- Experience serving older adults, adults with disabilities, Veterans, family caregivers, or individuals requiring long-term care support.
- Knowledge of person-centered and participant-directed service models.
- Ability to conduct respectful and effective in-home assessments.
- Capacity to complete and submit accurate, time-sensitive intake, assessment, employer, employee, and authorization documentation.
- Capacity to maintain secure electronic and/or paper records.
- Ability to comply with HIPAA, 45 C.F.R. requirements, and other applicable privacy and confidentiality obligations.
- Ability to provide services throughout the required geographic area.
- Adequate staffing, supervisory oversight, backup coverage, and quality-control procedures.
- Financial stability sufficient to perform the contract requirements.
- No current exclusion, suspension, debarment, or other prohibition from participation in federal health care programs or federally funded programs.

Preference may be given to proposers with direct experience in Veteran-Directed Care, self-directed care, fiscal-management services, Veterans services, aging and disability services, or comparable participant-directed programs.

6. Compliance Requirements

The selected contractor shall comply with all applicable federal, state, and local laws, regulations, standards, policies, and contractual requirements. The selected contractor shall also comply with all relevant terms of the agreement between Santee-Lynches and Bay Aging and any applicable VA requirements communicated by Santee-Lynches.

The contractor shall, at a minimum:

- Protect the privacy and confidentiality of Veteran and caregiver information.
- Comply with HIPAA and applicable privacy and security requirements.
- Maintain all records in a secure environment.
- Maintain records and supporting documentation for at least ten years.
- Cooperate with monitoring, audits, reviews, and inspections by Santee-Lynches, Bay Aging, the VA, and other authorized governmental entities.
- Promptly report suspected fraud, waste, abuse, improper billing, privacy breaches, conflicts of interest, or other compliance concerns.
- Notify Santee-Lynches within two business days of learning of any exclusion, suspension, debarment, adverse action, investigation, or other circumstance that may affect eligibility to perform services.
- Avoid conflicts of interest and disclose any actual, potential, or perceived conflict promptly in writing.
- Not subcontract or assign any portion of the contract without prior written approval from Santee-Lynches.

The VA's VDC framework emphasizes the need for providers capable of sustaining participant-directed services, demonstrating readiness to implement services, maintaining financial and operational competence, and supporting Veterans in receiving care in their homes and communities.

7. Insurance Requirements

Before beginning work, the successful proposer shall provide certificates of insurance acceptable to Santee-Lynches. Coverage must remain in effect throughout the contract term.

At a minimum, the successful proposer shall maintain:

Coverage	Minimum Requirement
Workers' Compensation	As required by applicable law
Commercial General Liability	\$1,000,000 per occurrence and aggregate
Professional Liability / Errors and Omissions	\$1,000,000 per occurrence

Santee-Lynches, its officers, employees, and agents may be required to be named as additional insureds where applicable. The contractor must provide at least 30 calendar days' advance written notice of cancellation, nonrenewal, or material reduction in coverage.

These requirements are based on the insurance standards applicable to Santee-Lynches' VDC collaboration agreement.

8. Contract Term

The initial contract term is anticipated to begin on or about **January 1, 2027** and continue through **January 1, 2028**, subject to the availability of funding, satisfactory contractor performance, and approval by Santee-Lynches.

Santee-Lynches may, at its sole discretion, renew the contract for additional one-year terms, subject to continuing program need, funding availability, contractor performance, and mutual agreement.

The contract may be terminated for convenience with 30 days' written notice or immediately for material breach, noncompliance, loss of required insurance, loss of eligibility, or circumstances that jeopardize Veteran safety, confidentiality, or program integrity.

9. Compensation and Pricing

Santee-Lynches anticipates compensating the successful proposer on a **per-completed assessment, per-completed enrollment packet, per-Veteran monthly support basis, hourly basis, or another negotiated payment methodology** that is consistent with available VDC funding and the services actually authorized.

Proposers must submit a detailed pricing schedule that identifies all anticipated costs, including:

- Initial Veteran assessment and options counseling.
- Employer packet completion.
- Employee packet completion.
- VA authorization packet completion.
- Follow-up or reassessment services.
- Ongoing monthly participant support or oversight, if applicable.
- Home visits and travel, if proposed as a separate reimbursable expense.
- Administrative, supervisory, documentation, reporting, and quality-assurance costs.
- Training, technology, or other fees.
- Any proposed minimum monthly charge, cancellation fee, or additional service rate.

Santee-Lynches reserves the right to negotiate final pricing, payment terms, performance standards, and the number of assignments based on program needs, funding availability, and the selected proposer's qualifications. No work may begin and no costs will be reimbursed without written authorization from Santee-Lynches.

10. Proposal Submission Requirements

Proposals should be clear, complete, and organized in the following order:

A. Cover Letter

Include:

- Legal name of proposer.
- Business address.
- Primary contact person.
- Telephone number and email address.
- Federal Employer Identification Number.
- Statement that the proposer is authorized to submit the proposal and enter into a contract if selected.
- Signature of an authorized representative.

B. Organizational Information

Provide:

- Description of the organization, ownership structure, and years in operation.
- Description of services currently provided.
- Geographic area served.
- Number and qualifications of staff who would perform services.
- Organizational chart showing supervisory structure.
- Identification of any subcontractors or partner organizations proposed.

C. Relevant Experience and Qualifications

Describe:

- Experience with Veteran services, aging services, disability services, home- and community-based services, case management, assessments, options counseling, or participant-directed care.
- Experience conducting in-home assessments and assisting individuals with complex care needs.
- Experience completing time-sensitive intake, enrollment, authorization, or service-planning documentation.
- Experience with HIPAA-protected information and secure data management.
- Experience coordinating with health care providers, public agencies, fiscal-management entities, or other community partners.

D. Staffing Plan

Provide:

- Names, titles, resumes, licenses, certifications, and relevant experience of key personnel.
- Number of staff available to perform services.
- Plan for training, supervision, staff retention, workload management, and backup coverage.
- Estimated maximum number of referrals, assessments, and ongoing cases the proposer can manage each month.
- Expected response time from referral receipt to initial Veteran contact and assessment completion.

E. Technical Approach

Describe the proposer's approach to:

- Receiving, tracking, and responding to referrals.
- Scheduling and completing in-home assessments.

- Conducting person-centered options counseling.
- Completing employer, employee, and VA authorization packets.
- Meeting required submission timeframes.
- Maintaining communication with Santee-Lynches, Bay Aging, Veterans, caregivers, and other authorized partners.
- Protecting confidentiality and securing protected health information.
- Managing incomplete documentation, missed appointments, difficult-to-reach Veterans, caregiver concerns, and changes in Veteran needs.
- Quality assurance, performance monitoring, and corrective action.
- Maintaining services during staff absences, turnover, emergencies, or increased referral volume.

F. Pricing Proposal

Provide a complete pricing schedule with all proposed rates and cost assumptions.

G. Required Certifications

Include signed certifications confirming:

- The proposer is not suspended, debarred, or excluded from participation in federal programs.
- Must be registered with Sam.gov
- The proposer will comply with all applicable laws, regulations, confidentiality requirements, and contract terms.
- The proposer will maintain required insurance.
- The proposer will disclose conflicts of interest.
- The proposal is true, complete, and accurate.

11. Evaluation Criteria

Proposals will be evaluated using the following criteria:

Evaluation Criterion	Maximum Points
Relevant experience with assessments, options counseling, aging/disability services, Veteran services, or participant-directed programs	25
Qualifications and capacity of proposed staff	20
Technical approach and ability to meet VDC service requirements	20
Ability to serve the required geographic area, conduct home visits, and provide backup coverage	10
Data security, HIPAA compliance, documentation, reporting, and quality-assurance processes	10
Pricing, cost reasonableness, and clarity of proposed fee structure	10
References and past performance	5
Total	100

Santee-Lynches may request interviews, clarification, additional information, best-and-final offers, or presentations from one or more proposers. Santee-Lynches reserves the right to waive minor irregularities, reject any or all proposals, negotiate with any proposer, award a contract to one or more proposers, or cancel this solicitation if it is in the best interest of Santee-Lynches.

12. Anticipated Procurement Schedule

Activity	Date
RFP issued	September 29, 2026
Deadline for written questions	October 15, 2026 @ 12:00PM
Responses to questions issued	October 16, 2026 @ 12:00PM
Proposal deadline	October 30, 2026 @ 12:00PM
Evaluation period	November 2 - 13, 2026
Interviews, if necessary	November 30 – December 4, 2026
Notice of intent to award	December 14, 2026
Contract execution	December 30, 2026
Anticipated service start date	January 1, 2027

Santee-Lynches may revise this schedule at its discretion.

13. Questions and Submission Instructions

Questions regarding this RFP must be submitted by **October 15, 2026 @ 12:00PM** in writing by email to:

Esmonde Levy
Santee-Lynches Regional Council of Governments
Email: el Levy@slcog.org

Written questions or requests for clarification must be received before the question deadline stated above. Any request received **after** the above stated deadline **will not** be considered. All requests received prior to the above deadline will be responded to in writing in the form of an addendum addressed and emailed to all prospective bidders.

Proposals must be submitted no later than **October 30, 2026 @ 12:00PM**. Late proposals may be rejected. To qualify for consideration, **one (1) original and three (3) copies** of your Proposal must be received by the office designated above by **the stated deadline**. It is the sole responsibility of the Proposer to see that the proposal is received before the submission deadline. The Proposer shall bear all risks associated with delays in the U.S. mail or delivery service. **Proposals shall be accepted in person, by U.S. Mail or by private courier service.** **NO** proposal shall be accepted via oral or email communication, telephone, or fax transmission.

*Outside of sealed bid envelope must be marked: **Veteran-Directed Care Assessment and Options Counseling Services**

Mailing Address:
Santee-Lynches Regional Council of Governments
3219 Broad Street
Sumter, SC 29150

14. General Terms and Conditions

- This RFP does not commit Santee-Lynches to award a contract, pay any costs incurred in preparing a proposal, or procure any services.
- Santee-Lynches reserves the right to accept or reject any proposal in whole or in part.
- All submitted proposals become records of Santee-Lynches and may be subject to applicable public-records laws.
- The selected contractor shall be an independent contractor and not an employee, agent, or representative of Santee-Lynches, Bay Aging, or the VA.
- The selected contractor shall not make public statements, use logos, issue press releases, distribute outreach materials, or represent the VDC program externally without prior written approval from Santee-Lynches.
- The selected contractor shall indemnify and hold harmless Santee-Lynches, its officers, employees, and agents from claims arising from the contractor's negligent, intentional, improper, or nonconforming acts or omissions, subject to the final negotiated contract.
- The final contract will include all required provisions related to confidentiality, HIPAA, records retention, insurance, monitoring, termination, compliance, conflicts of interest, and access to records.

Attachment A
Proposed Pricing Schedule

Service	Unit of Service	Proposed Rate	Notes/Assumptions
Initial Veteran assessment and options counseling	Per completed assessment	\$	
Follow-up assessment/reassessment	Per completed service	\$	
Ongoing options counseling/support	Per Veteran/month	\$	
Training/orientation	Per hour or included	\$	

Attachment B
Required Certifications

The undersigned certifies that:

1. The proposer is legally authorized to conduct business in South Carolina.
2. The proposer is not currently suspended, debarred, or excluded from participation in any federal health care program or other federally funded program.
3. The proposer will comply with all applicable federal, state, and local laws, regulations, policies, and contractual requirements.
4. The proposer will protect Veteran and caregiver information and comply with applicable HIPAA and confidentiality requirements.
5. The proposer will maintain the insurance required by this RFP and the final contract.
6. The proposer will disclose actual, potential, or perceived conflicts of interest.
7. The proposer understands that selection does not create a contract until a written agreement is fully executed by Santee-Lynches.
8. All information contained in the proposal is true, complete, and accurate.

Organization Name: _____

Authorized Representative: _____

Title: _____

Signature: _____

Date: _____