

REQUEST FOR QUALIFICATION
FOR
FOCAL POINT SERVICES
FOR FISCAL YEAR 2016-17

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Responses must be received at the Social Services Division office; Aging and Disabilities Services Unit no later than 4:00 pm, February 2, 2016

SECTION I

A. General Information

Clackamas County Social Services Division, Aging and Disability Services (SSD-ADS) is holding a competitive procurement process for federal Older Americans Act (OAA) funded services for seniors in Clackamas County.

1. Contracts will go to contractors in the following Clackamas County service areas: Canby, Estacada, Gladstone, Hoodland/Welches, Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, West Linn, and Wilsonville. Contractors will provide the following OAA funded services.
 - Focal Point –Client Assessment, Information and Assistance, limited Case Management, Outreach, Health Promotion and Transportation;
 - Meal Site Management; and
 - Meal Preparation/Food Service (Canby, Hoodland/Welches, Lake Oswego, Milwaukie and Wilsonville areas only).
 - Family Caregiver Day respite services (Currently Lake Oswego, Milwaukie & Sandy areas only)
2. A contract will be awarded to one contractor to provide County-wide the services of Guardianship/Conservatorship and Guardianship Diversion.
3. A contract will be awarded to one contractor to provide legal services throughout Clackamas County to the most vulnerable seniors, age 60 and over, to protect their health, welfare, independence and security. These services will be provided where other legal services are not available, targeting those in greatest social and economical need, minority, institutionalized, isolated, rural and/or homebound.

SSD-ADS has the responsibility to plan, develop, support, and coordinate services for a comprehensive service delivery system for citizens age 60 and older, or for people with disabilities. SSD-ADS receives federal Older Americans Act (OAA) funds and state funds to help support this system. The delivery of services is mainly by contracting with service providers.

The funding sources to be utilized in these contracts are: OAA Title III-B – Access/Supportive Services, Title III-C – Nutrition Services, Title III-D - Health Promotion Services, and Title III-E – Family Caregiver Support Services/Day Respite; and State and Federal Transportation funds. These funds may not cover the total cost for services being provided, so contractors are encouraged to develop other resources, as appropriate, to supplement contract funds.

There are no limits on resources or assets that an individual client receiving OAA funded services may have. OAA funded service providers must allow, and may solicit, voluntary contributions from recipients for all services under the Act, as long as the method of solicitation is non-coercive. Services that require a fee from the participant are not eligible under the OAA guidelines.

This preliminary Request for Qualification (RFQ) will determine which contractors are qualified to make an offer to provide services. If competition exists in any area, the qualified providers will participate in a subsequent Request for Proposal (RFP) process.

The RFQ/RFP process will result in contracts being awarded for fiscal year 2016-17 (July 1, 2016 - June 30, 2017). With satisfactory performance, the contracts may be renewed annually for four additional years.

The population served by contractors will be 60 years of age or older. This does not imply a reduction of services to the disabled population, who are primarily served through the mechanism of federal Title XIX (Medicaid) funding.

There must be recognition of, and agreement with, the Clackamas County Policy on Aging which states: "It is only just that our older citizens be assisted by appropriate means in maintaining their independence and their dignity." All services must adhere to all applicable Federal and State laws, rules and regulations, as well as related County requirements.

B. Service Definitions

1. Focal Points - Criteria for Focal Point Designation

- a. A response to an RFQ or RFP or submission of a formal letter which shall be sent to Clackamas County Social Services Division, Aging and Disabilities Unit which establishes:
 - 1) How the entity was identified locally as a candidate for Focal Point status, and the area to be served;
 - 2) How the entity proposes to provide and/or co-locate the following services:
 - a) Nutrition
 - b) Information and Assistance
 - c) Client Assessment
 - d) Limited Case Management
 - e) Outreach
 - f) Transportation
 - g) Legal Services
 - h) Referral to local DHS/APD offices, including referrals for disabled adults in need of long term care
 - i) Recreational and educational programs

- j) Volunteer programs
 - k) Other (may be specified);
- 3) Recognition of, and agreement with, the Clackamas County Policy on Aging; and
 - 4) Sufficient hours of operation, which will be a minimum of four days, 32 hours per week.
- b. The development of a contract or letter of agreement which identifies the role of each party including:
- 1) Services to be provided by the responding Contractor;
 - 2) Technical assistance to be provided by the Social Services Division Aging and Disability Services;
 - 3) A client confidentiality statement;
 - 4) An outline of how the responding Contractor will be identified locally and county-wide including efforts to work with local "gatekeepers" and the "natural network" within the community; and
 - 5) The time period covered by the agreement or contract.
2. The following are OAA reimbursable services for responding Providers:

Public Outreach/Education: Is a service or activity to provide information to groups of current or potential clients and/or aging network partners and other community partners regarding available services for the elderly. A Unit of service is one documented contact.

Reassurance: Regular friendly telephone calls and/or visits to physically, geographically or socially isolated registered clients that are receiving services to determine if they are safe and well, if they require assistance, and to provide reassurance. A unit is one contact.

Case Management/Client Assessment: Is an in-depth interview with a client to provide access to an array of service options to assure appropriate levels of service and to maximize coordination in the service delivery system. Case management must include four general components: access, assessment, service implementation, and monitoring. A Unit of service is one hour.

Information and Assistance: A service for that provide current information on opportunities and services available within the inquirer's communities; assesses the problems and capacities of the individuals; links individuals to the opportunities and

services; to the maximum extent feasible, ensures the individual receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures. A Unit of service is 1 contact.

Transportation: Scheduling and/or providing rides for older persons who are unable to manage this situation independently. A Unit of service is one one-way ride.

Meal Site Management: Meal Site Management includes such tasks as: supervising final on-site preparation and serving/delivery of meals to eligible congregate and home delivered participants; recruiting, training, scheduling and monitoring program volunteers; determining eligibility of participants; collecting and accounting for participant donations; completing and submitting required budget and program reports, providing events and activities for congregate meal participants; and publicizing meal program in the community to enhance visibility and encourage participation. A unit is one meal served/delivered.

Legal Assistance: Legal advice or representation provided by an attorney to older individuals with economic or social needs, including counseling or other appropriate assistance by a paralegal or law student acting under the direct supervision of an attorney, or counseling or representation by a non-lawyer where permitted by law. Unit of service is one hour.

Physical Activity/Falls Prevention: The provision of physical fitness programs that include a focus on strength, balance, and flexibility exercise to promote physical activity and/or prevent falls, which have been demonstrated through rigorous evaluation to be evidence-based and effective with older populations. A unit is one class.

Preventative Screening, Counseling, and Referral: Education about the availability, benefits and appropriate use of Medicare preventive health services or other preventive health programs. Health risk assessments and screenings, and preventive health education provided by a qualified individual, to address issues including hypertension, glaucoma, cholesterol, cancer, vision, hearing, diabetes, bone density and nutrition screening. Health information on on-going and age-related conditions including osteoporosis, cardiovascular diseases, diabetes, and Alzheimer's disease and related disorders. A unit is one client served.

Caregiver Day Respite: Services that provides respite by attendance of the care recipient at a senior center or other non-residential day program. A unit of service is one hour of services.

Guardianship/Conservatorship: Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservator-ship. A unit is one hour of service.

Guardianship Diversion Program: Providing services for clients and/or families intended to help insure all possible alternatives are explored before the step of Guardianship is taken. A unit of service is one hour.

C. Current Funding Level

The dollar figures below reflect the current OAA funding for the period of July 1, 2015 through June 30, 2016.

Current Focal Point Contractors

<u>Location</u>	<u>Services Provided</u>	<u>Total OAA Dollar Amount</u>
Canby Adult Center	Limited Case Management Transportation Reassurance Info & Assistance Outreach Food Service Meal Site Management Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral	\$116,718
Friends of Estacada Community Center	Meal Site Management Info & Assistance Limited Case Management Reassurance Transportation Outreach Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral	\$31,954
City of Gladstone	Info & Assistance Limited Case Management Meal Site Management Transportation Reassurance Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral	\$16,384
Hoodland Senior Center <i>Access Point – no senior center available. Activities “outstationed.” Admin. office</i>	Reassurance Limited Case Management Transportation Info & Assistance	\$25,812

*for centralized service/program
coordination and implementation.*

Outreach
Meal Program
Physical Activity/Falls Prevention
Preventative Screening, Counseling, and Referral

City of Lake Oswego	Info & Assistance Limited Case Management Transportation Reassurance Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral Alzheimer's Day Respite Program	\$45,858
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North Clackamas Parks and Recreation District as Milwaukie Center	Info. & Assistance Limited Case Management Reassurance Outreach Transportation Food Service Meal Site Management Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral Alzheimer's Day Respite Program	\$239,953
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Molalla Adult Comm. Ctr.	Info & Assistance Limited Case Management Reassurance Outreach Transportation Meal Site Management Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral	\$34,833
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City of Oregon City as Pioneer Comm. Ctr. (and services for West Linn)	Info & Assistance Limited Case Management Transportation Reassurance Meal Site Management Physical Activity/Falls Prevention Preventative Screening, Counseling, and Referral	\$39,203
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City of Sandy	Info & Assistance Limited Case Management Reassurance Transportation Meal Site Management	\$37,752
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Physical Activity/Falls Prevention
 Preventative Screening, Counseling, and Referral
 Alzheimer's Day Respite Program

City of Wilsonville	Case Monitoring	\$51,872
	Transportation	
	Client Assessment	
	Info & Assistance	
	Meal Site Management	
	Physical Activity/Falls Prevention	
	Preventative Screening, Counseling, and Referral	

<u>County Wide Services</u>	<u>Total OAA Dollar Amount</u>
Guardianship/Conservatorship and Guardianship Diversion,	\$48,696
Legal Assistance Services	\$21,633

SECTION II
Response to The Request for Qualification

The following items must be submitted with your response:

1. Evidence of your legal power to contract for service, be incorporated and have legal authority to operate in Oregon and enter into contracts or other legal agreements.
2. A description of Insurance and Bonding procedures. (Note: Clackamas County requires a \$1,000,000 general liability per occurrence and \$1,000,000 automobile liability policies each occurrence for Bodily Injury and Property Damage which hold Clackamas County harmless and name as co-insured – Clackamas County, Ride Connection, TriMet and State of Oregon.)
3. A statement of fiscal solvency. (Note: You must be able to ensure working capital to cover program expenses for at least 60 days.)
4. A certified audited financial statement, performed during calendar year 2014.
5. A statement that you adhere to Equal Opportunity Employer Affirmative Action standards, Americans with Disabilities Act standards, and have adequate personnel policies in effect.
6. A brief description and history; include relevant experience of contractor and staff providing the services proposed for funding.
7. A current organizational chart of existing personnel structure.
8. A brief explanation of how you will coordinate services to ensure meeting needs of seniors in the community.

SECTION III

A. Final Notes

Agencies currently providing services **need not** submit a response to this Request for Qualification (RFQ). They have been accepted as qualified to participate in the Request for Proposal (RFP) process.

Sections II and III in this RFQ must be followed. Social Services Division reserves the right to reject responses which are late or incomplete.

All questions after the release of the RFQ must be submitted in writing to ADS Contract Specialist by 5:00 PM, January 21, 2016. Written responses to questions will be made to all providers requesting RFQs.

Provider RFQ responses must be received at the Social Services Division office no later than 4:00 pm, February 2, 2016. Responses must be addressed to the attention of ADS Contract Specialist, may be hand delivered or mailed to – 2051 Kaen Road, P.O. Box 2950, Oregon City, OR 97045.

The response to the RFQ will indicate your participation and act as a "letter of intent" in the RFP process. Thank you for your interest in providing services for older citizens in Clackamas County.

B. RFQ/RFP TIMELINES**2015 - 2016 Older Americans Act Funded Services**

Date	Task	Action By
12/23/15	Approval of RFQ Packet	SSD-ADS Staff
12/30/15 - 1/14/16	Advertise RFQ	ADS Contract Specialist
12/30/15 - 1/14/16	Distribute RFQ	ADS Contract Specialist
01/18/16	Last day to request RFQ packet	
01/21/16	Deadline for written questions @ RFQ	Submitting Contractors
02/02/16	RFQs due in to SSD by 4:00 pm	Submitting Contractors
02/03/16 - 2/9/16	Development of RFP packets	ADS Contract Specialist
02/03/16	Review RFQs - develop list of qualified applicants. Approve RFP.	Review Committee
02/10/16	Mail out RFPs to qualified applicants	ADS Contract Specialist
03/09/16	RFPs due to SSD by 4:00 pm	Submitting Contractors
03/10/16	Review of RFPs, selections made	Review Committee
03/14/16	Approval of selections; Successful offeror announced	Aging Services Advisory Council
03/15/16	Award letters issued	ADS Contract Specialist
03/16-28/16	Appeal Period	
03/28/16- 04/07/16	Draw up agreements with selected agencies, send out for signatures	ADS Contract Specialist
06/06/16	Signed agreements due back to SSD from agencies	Selected Contractors
06/23 & 30/16	Contracts signed/approved at BCC meeting	Board of County Commissioners
07/01/16	Effective date of contracts	
07/07/10	All fully executed agreements sent to agencies	ADS Contract Specialist