



Solicitation Information
May 8, 2014

RFP # 7548738

TITLE: RI Aging and Disability Resource Center (ADRC) – THE POINT

SUBMISSION DEADLINE: Monday, June 9, 2014 at 11:00 AM (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE: No

MANDATORY:

If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents. A vendor's failure to attend and register at the mandatory Pre-Bid/ Proposal Conference shall result in disqualification of the vendor's bid proposals as non-responsive to the solicitation.

DATE:

LOCATION:

Questions concerning this solicitation must be received by the Division of Purchases at David.Francis@purchasing.ri.gov no later than **Monday, May 19, 2014 at 10:00 AM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

David J. Francis
Interdepartmental Project Manager

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed four-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

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SECTION 1: INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Rhode Island Department of Human Services, Division of Elderly Affairs (“DEA”), is soliciting proposals from qualified agencies to operate the main, statewide office of THE POINT, a key operating partner in Rhode Island’s Aging and Disability Resource Center (“ADRC”), in accordance with the terms of this Request for Proposals and the State’s General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases Home Page by Internet at www.purchasing.ri.gov.

The initial contract period will begin approximately on September 30, 2014 and end on September 29, 2015. Contracts may be renewed for up to four additional 12-month periods based on vendor performance and the availability of funds.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

1. Potential vendors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for these costs.
4. Proposals are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.
6. Proposals misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division.
7. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered. Subcontracts are permitted, provided that their use is clearly indicated in the vendor’s proposal and the subcontractor(s) to be used is identified in the proposal.
8. All proposals should include the vendor’s FEIN or Social Security number as evidenced by a W9, downloadable from the Division’s website at www.purchasing.ri.gov.

9. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
10. Vendors are advised that all materials submitted to the State for consideration in response to this RFP will be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island, without exception, and will be released for inspection immediately upon request once an award has been made.
11. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
12. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation.
13. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).
14. The vendor should be aware of the State’s Minority Business Enterprise (MBE) requirements, which address the State’s goal of ten percent (10%) participation by MBE’s in all State procurements. For further information visit the website www.mbe.ri.gov
15. Under HIPAA, a “business associate” is a person or entity, other than a member of the workforce of a HIPAA covered entity, who performs functions or activities on behalf of, or provides certain services to, a HIPAA covered entity that involves access by the business associate to HIPAA protected health information. A “business associate” also is a subcontractor that creates, receives, maintains, or transmits HIPAA protected health information on behalf of another business associate. The HIPAA rules generally require that HIPAA covered entities and business associates enter into contracts with their business associates to ensure that the business associates will appropriately safeguard HIPAA protected health information. Therefore, if a Contractor qualifies as a business associate, it will be required to sign a HIPAA business associate agreement.

SECTION 2: BACKGROUND

The Rhode Island Department of Elderly Affairs was established in 1977 (under Rhode Island General Laws Chapter 42-66) in response to the growing needs of Rhode Island’s older population. In 2011, DEA became a Division of the Rhode Island Department of Human Services (RIDHS) and continues to serve as the designated State Unit on Aging (“SUA”) for the State of Rhode Island. As the designated SUA for the State of Rhode Island, DEA is responsible for the development and implementation of a comprehensive coordinated system of community-based care for citizens sixty years of age and older. DEA is responsible for advocating for the rights of older individuals, operating services designed to assist

seniors to remain independent in the community and funding an array of community based services in effort to assist them with remaining in the home. DEA coordinates these efforts and activities of the State Aging Network in order to ensure the delivery of statewide, comprehensive, coordinated benefits and services.

The ADRC program is a collaborative, national effort of AoA and CMS. Today, there are ADRC programs in every state, and their purpose is to serve as “*one-stop shopping centers*” or “*no wrong door portals*” for community-based long-term care services for seniors, adults with disabilities, their families, and caregivers of all income levels, thereby eliminating the frustrations people experience in trying to understand and access available services and resources.

Rhode Island’s ADRC system is administered by DEA and has been in operation since 2005. Rhode Island’s ADRC is comprised of a network of state and local organizations, and its goal is to allow access to services to be seamless and well-coordinated for senior consumers, adults with disabilities, and their families and caregivers.

THE POINT is a key operating partner within the Rhode Island ADRC system and serves as an accessible walk-in and call-in portal for the ADRC. Access to THE POINT is primarily through a central call center and walk-in facility currently located in Providence and through regional “POINTS” situated at various non-profit organizations and local government agencies throughout the state that provide support to the central POINT and offer services with local community convenience. (The United Way of Rhode Island, Inc. currently serves as THE POINT’s central location.) THE POINT partners are staffed by benefits specialists with expertise in long-term care issues that impact seniors, adults with disabilities, their families, and caregivers.

THE POINT is operating in an environment affected by the following factors:

- An aging population and increases in survival rates for disabling conditions will increase the number of individuals requiring long term supports and increase the costs of these services.
- Pressure will increase to contain state and federal spending for these services.
- States will require greater ability to match individuals to the most cost-effective person-centered service plan and to collect and analyze data on the individuals they support in order to make informed policy decisions.

THE POINT is uniquely situated to serve as a primary portal to long term care supports and services. It is designed to be a principal mechanism for allowing Rhode Island to control costs by creating a well-informed populace aware of their long term care options to remain in the community and receive needed health care. DEA, through THE POINT, is committed to the empowerment of seniors and adults with disabilities to have greater control over their health and their lives by improving their ability to navigate the health care system and to make informed choices.

Initial contact with THE POINT begins the process to link consumers to a broad range of information, resources, options counseling and access to appropriate benefits and programs, often through referrals to other key ADRC partners, such as DEA’s case management agencies, and beyond to supporting ADRC partners in state agencies who provide eligibility determination and service authorization with completion of the loop through service delivery, client tracking and data collection.

As a central portal for Rhode Island’s ADRC, the main, statewide office of THE POINT serves as an intake portal for the Rhode Island Division of Elderly Affairs’ (DEA) Home & Community Care (H&CC)

Program. Referrals for H&CC Program services from THE POINT may be made to DEA for assignment to case management agencies. As of July 1, 2012, the DEA case management agencies became formal operating partners in the ADRC; currently, there are five (5) case management agencies, each assigned to cover a specific geographic region of the state so that Rhode Island has statewide case management coverage.

During the six (6) month period from period October 1, 2013 through March 31, 2014, at the main statewide office of The POINT:

- There were approximately 29,000 contacts (calls and walk-ins) and 19,000 unduplicated clients
- Approximately 10,000 clients received Options Counseling
- More than 14,000 individuals were assisted with long term care program enrollment
- Average call length was approximately 20 minutes

DEA anticipates funding one (1) grant in the amount of \$200,000 in federal Older Americans Act funds to operate the main, statewide office of THE POINT for the initial twelve (12) month contract period from September 30, 2014 through September 29, 2015. DEA anticipates that the amount of funding available for each of four (4) *one-year* renewal periods of September 30, 2015 through September 29, 2016 (if applicable), September 30, 2016 through September 29, 2017 (if applicable), September 30, 2017 through September 29, 2018 (if applicable), and September 30, 2018 through September 29, 2019 (if applicable) also would be equal to \$200,000 per grant period.

Such funding is subject to availability of funds allocated to DEA under the Older Americans Act of 1965, as amended (“OAA”) and/or changes in allocation of funds. In addition, all funding under this RFP is subject to changes in allocation of funding by DEA as a result of budgetary and/or program planning actions taken by DEA. DEA also reserves the right to reduce the number of grants made available for each period and/or to reduce the amount of any grant award(s). DEA also reserves the right to terminate this RFP at any time for any reason whatsoever and also reserves the right to not renew contract(s) for any renewal period(s).

SECTION 3: SCOPE OF WORK

The main, statewide office of THE POINT (references in this Section 3 to “THE POINT” mean the main, statewide office of THE POINT) will provide a comprehensive call and walk-in center that: 1) is centrally located within the State; 2) is accessible to an efficient system of public transportation; 3) is accessible to frail elders and individuals with disabilities; and 3) includes the following range of screening, assessment, counseling, and referral services, provided in a wraparound manner that promotes the dignity and independence of the client:

- *Intake*: The process through which inquiries are initially answered with the goal of quickly and efficiently routing the individual to the most appropriate information source or type of service.
- *Benefits Counseling*: Benefit Specialists will be available to ensure that individuals receive assistance in navigating a complex system and in applying for public and private benefits for which they are eligible.
- *Options Counseling/Person-Centered Counseling*: Options counselors will be available to provide this service, an interactive decision-support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long-term care choices in the context of the consumer’s needs, preferences, values, and individual circumstances.
- *Care Transitions*: Assistance with the transition from a hospital or long term care institution to the community.

- *Linkage to Health Care and Chronic Long Term Care:* THE POINT will establish and maintain effective working relationships with the provider community in order to efficiently connect individuals in need of support and services with the appropriate providers of these services.

THE POINT will serve as a portal to all publicly and privately administered chronic/long term care supports.

The contractor selected shall work in collaboration with DEA, regional offices of THE POINT, Department of Human Services (DHS), Department of Behavioral Healthcare, Developmental Disabilities and Hospitals (BHDDH), Executive Office of Health and Human Services (EOHHS), RI Department of Health (HEALTH), DEA-certified case management agencies, any other community agencies within the Aging and Disability Resource Center (ADRC) partnership network, and such other agencies as shall be designated by DEA.

The contractor will provide all services and materials to support this project. To be considered, offerors must demonstrate proven experience in the following areas:

- Ability to develop materials for all levels of education/understanding.
- Provision of information to multi-cultural populations (at least two languages, in addition to English).
- Capacities to recruit, hire, train and sustain a qualified work force.
- Identify all staff and/or subcontractors proposed as members of the project team and the duties, responsibilities and concentration of effort which apply to each, as well as resumes, curricula vitae, or statements of prior experience and qualifications with complex public sector programs and/or benefit programs.
- Ability to generate sophisticated data driven reports on all program activities, as required by DEA and the U.S. Administration on Aging.
- Commitment of resources and staff to a social services and advocacy mission to link elders, adults with disabilities, their families and caregivers to information, services and support to ensure better health outcomes and choices for long term care.

In addition to the above, the contractor selected is required to:

- Intervene with individuals at risk of entering an institution, regardless of income, with the goal of providing them with information, screening, non-clinical assessment and counseling that will allow them to make informed choices about the long term supports they need.
- Facilitate care transitions efforts; develop and enhance ADRC participation in evidence-based care transitions models.
- Collect and disseminate timely and accurate information to clients of ADRC about the availability of services supporting seniors and adults with disabilities.
- Facilitate the intake, non clinical assessment, and eligibility determination process for long term support services funded through Medicaid, Medicaid Waiver, the Older Americans Act or state revenue to maximize the likelihood that individuals will be able to receive the support they need as quickly as possible.
- Follow-up to ensure that appropriate linkages are successful for clients of THE POINT.

- Collect, organize and manage comprehensive information about services that seniors and adults with disabilities need or desire and identify gaps in available services.
- Assist the state by matching needs and preferences of seniors and adults with disabilities to the most cost effective setting.
- Establish effective partnerships with the health care community that will assist ADRC clients with access to appropriate services and resources for better health outcomes.
- Collaborate with RI Department of Human Services (RIDHS) and RI Executive Office of Health and Human Services (EOHHS) staff to support Medicaid recipients who wish to live in the community and receive needed health care services at home.
- Collaborate with DEA and its designee(s) to establish a system of formal linkages with the RI healthcare community.
- Work with DEA and its designee(s) to provide required data and/or reports for an analysis of ADRC program effectiveness.
- Provide DEA with formal monitoring reports in a manner and at intervals required by contractual agreements.
- Collect and synthesize all required data in a manner and format as required by DEA.
- Provide ongoing promotional activities and materials in both customary and creative ways, and in collaboration with other state agencies and community partners, to engage the RI community in contacting THE POINT for assistance in making informed choices about health care and long term care services for themselves and their families.
- Counsel and intervene with individuals at risk of entering an institution with the goal of providing them with information, screening, assessment and counseling that will allow them to make informed choices about the long term supports they need.
- Collect and disseminate timely and accurate information about the availability and quality of services supporting seniors and adults with disabilities.
- Facilitate the intake, assessment, and eligibility determination process for long term support services funded through Medicaid, the Older Americans Act or state revenue to maximize the likelihood that individuals will be able to receive the support they need as quickly as possible.
- Follow-up with clients of THE POINT to ensure that appropriate linkages have been made and that needed services have been provided.
- Collect, organize and manage comprehensive information about services that seniors and adults with disabilities need or desire and identify gaps in available services.
- Assist consumers with application to the Rhode Island Pharmaceutical Assistance to the Elderly (RIPAE) program ensuring receipt of complete application documentation and working collaboratively with DEA to guarantee appropriate processing of documentation, program access, and enrollment.

- Promote the Senior Health Insurance Program (SHIP) and provide SHIP assistance to consumers, as necessary.
- Collaborate with SHIP volunteers, DEA and other ADRC partners in Medicare Part D annual Open Enrollment events.
- Promote the SMP (Senior Medicare Patrol) program to Medicare eligible consumers, as necessary.
- Assist the state in maximizing the benefit of limited resources by matching needs and preferences of seniors and adults with disabilities to the most cost effective setting.
- Establish effective partnerships with the health care community to ensure that individuals have access to the appropriate services and resources for better health outcomes.
- Assist all partners, other community agencies and individuals with inquiries about federal and state rules and regulations for government benefits and programs.
- Field basic inquiries and detailed questions from individuals regardless of age or income to facilitate navigation through the long term care system.
- Implement I&R/A and “Options Counseling/Person-Centered Counseling” programs that address the needs and preferences (cultural and linguistic characteristics)of seniors, their families and caregivers in the service region, including consumers in long term care facilities who seek to return to the community – regardless of income level.
- Serve as a resource to family members and caregivers in gathering information and assisting in completing applications for the client.
- Identify systems barriers for individuals and bring those issues to the attention of DEA.
- The contractor will continue to provide appropriate ADRC services to an individual with no limit on the number of times an individual may reasonably contact THE POINT for assistance.
- Establish and maintain effective working relationships with the RI health care community in order to ensure better health outcomes for clients.
- Collaborate with RIDHS and EOHHS staff to expand supportive counseling and intervention for those Medicaid recipients who wish to live in the community and receive needed health care services at home.
- Coordinate and provide all required data and/or reports for analysis of ADRC program effectiveness.
- Provide DEA with formal monitoring reports in a manner and at intervals required by contractual agreements.
- Collect and synthesize all required data in a manner and format as required by DEA.
- Services must be provided to individuals of all income levels.

The contractor also will be responsible for the following tasks and deliverables:

- The contractor will establish a call and walk-in center;
- The contractor will install a phone system, computer system and all furnishings and office equipment necessary to accomplish the goals of THE POINT.
- The contractor shall develop a plan to implement the AIRS (Association of Information and Referral Specialists) Standards for Information, Referral and Assistance. These Standards include, but are not limited to the following:
 - THE POINT will act as a knowledgeable and courteous initial client contact that sets the tone for successful consultation or referral.
 - THE POINT will provide the public with a toll-free number, TTY and email capabilities.
 - THE POINT will answer all inquiries with a system that ensures that a client speaks directly with a person, as opposed to an answering machine or voicemail, where practicable.
 - THE POINT will have a mechanism for routing after hour inquiries through a staffed answering service, either privately or publicly run, including 2-1-1 services; this provision must be included in this proposal.
- The contractor must work in partnership with all walk-in sites or “regional POINTs”. This partnership will include, but not be limited to the following:
 - Scheduling appointments for home visit services throughout the state.
 - Coordinating and organizing training events, staffing trade shows and development of public relations materials.
 - Participating in workgroup and advisory committee meetings.
 - Ongoing training and interaction with benefit specialists in regional POINTs within the community.
- The contractor must have the capacity to provide the following:
 - Meet physical accessibility requirements, in accordance with all state/federal laws and regulations, and be able to provide information and assistance to walk-ins in a location that offers privacy and is easily accessible by public transportation.
 - Identify the problem leading to the inquiry, the knowledge and capacities of the inquirer, and the urgency of the problem, to determine how to approach the information-giving service.
 - Provide information, which is updated through continual revision at intervals sufficiently frequent to ensure accuracy of information and comprehensiveness of content, about services, resources, providers and programs related to long term or chronic care and community services and benefits.
 - Indicate to the client those agencies or providers that may be capable of meeting the client’s need(s). Assist in linking clients to those resources and organizations. Resources may include, but are not limited to:
 - Adult Protective Services for abuse, neglect and exploitation
 - Transportation
 - Health and nutrition service providers
 - Legal and financial issues advisors
 - Employment, training and vocational rehabilitation programs
 - Education, recreation, and volunteerism opportunities
 - Housing Agencies
 - Long-Term Care Ombudsman Program and other advocacy groups
 - Related health and social service hotlines
 - Licensing and quality monitoring agencies for health care services
 - Healthsource RI
 - Managed care organizations

- Refer calls with defined legal issues to the proper authorities. These include calls that must, by law, be handled by DEA Adult Protective Services (APS), the police department, the fire and emergency medical services, and any agency responsible for serving specific populations.
- Refer all inquiries for urgent or emergency service or in which the client's needs cannot be determined to the coordinator of THE POINT. The coordinator will determine the urgency of the call and the appropriate course of action.

Staffing Requirements

The contractor will employ one full time coordinator to manage, coordinate and organize all activities and responsibilities within this solicitation. The scope of work described within does not exceed one full time coordinator.

The contractor will employ and train benefit specialists and Options/Person-Centered Counselors to staff THE POINT during hours of operation. The workforce must include, at a minimum, bilingual capacity in Spanish during all operating hours. THE POINT must establish links to provide service capacity in other languages, common to the RI population.

The contractor will employ and train a sufficient number of benefit specialists and Options Counselors to staff THE POINT. **Staffing levels are expected to be such that at least 75% of calls will be returned in the same day and 100% of calls will be returned by the next business day. See Section 2 above for current call volumes.** The contractor shall make every effort to respond to inquiries directly as opposed to callers being transferred to a voicemail system.

Benefit specialists/Options Counselors should demonstrate a working knowledge of no less than the following topics:

- RI Medical Assistance: eligibility guidelines, programs and products
- Medicare: eligibility guidelines, programs and products
- Long Term Care financial planning
- Social Security: SSI, SSDI
- RI Pharmaceutical Assistance for the Elderly
- Federal Health Promotion programs: SHIP, SMP, MIPPA
- Resources for individuals with dementia, and their caregivers
- Housing issues, including tax sales and Homestead Tax Credits
- Information on age discrimination
- Supportive home services, home modifications, DME
- Heating assistance
- Reverse mortgages, Long Term Care financial planning
- General relief
- Legal services referrals
- Community-based services, such as: home care, adult day care, respite, assisted living, transportation, senior centers, PERS, etc.
- Nutrition services: congregate and home-delivered meals, SNAP
- Federal programs, including: Senior Companion Program, National Family Caregiver Support Program
- Programs and benefits for veterans
- Protective services
- Mental health/behavioral health resources
- Patient Coaching models

- Hospital discharge planning resources
- Health Insurance, Affordable Care Act, Healthsource RI, managed care services

Required Technology/Data Collection/Reporting Capacity

- Install and maintain adequate telephone lines.
- Install and maintain computer(s) that (a) are running the Windows operating system; (b) have broadband connection to the Internet; (c) utilize the Microsoft Internet Explorer browser; and (d) have the ability to send and receive e-mail, secured, as necessary.
- Use a database of caller information to determine if a caller has previously contacted THE POINT.
- The contractor will collect and report all information as required by DEA. Examples of such information will include but not be limited to:
 - sufficient demographic information (name and address) and applicable data concerning the client's condition, setting or need for information, counseling or a direct link to the most appropriate individual or agency
 - number of contacts by type (e.g., consumer, caregiver, professional, etc.; phone or in-person) and by referral source
 - collect client demographic data (e.g., age, disability type, race/ethnicity, income level, etc.)
 - keep track of the types of services provide to clients (e.g., prescription assistance, transportation, housing, options counseling, etc.) and how services were provided (e.g., in person or by telephone)
 - clients assisted with transition from hospital or long term care facility
 - clients assisted with accessing long term care programs
 - client referrals to services (by service type)
 - unduplicated clients
 - ability to follow up with clients to ensure that needed services have been obtained
 - topics covered
 - units of service for one-on-one outreach; group outreach events and clients served; as well as a breakdown of the costs of the various services provided.
- The contractor will complete and submit all required reporting to DEA. Reports will include, but not be limited to, the following:
 - Call Tracker Reporting
 - ADRC Monthly Report
 - ADRC Semi-Annual Report
 - SHIP Talk
 - SMP Smart Facts
 - All required federal and state grant reports
 - Financial Monthly Report
- The contractor will develop and implement a system of customer satisfaction tracking for clients of THE POINT and will provide a written report on the results to DEA once a year or at other intervals as required by DEA.

Required Operating Hours and After-Hours/Emergency Services

- The main, statewide office of THE POINT will be open during customary business hours, with extended hours, as required by DEA, in response to increases in the volume of contacts. Currently, DEA anticipates such hours to be as follows: Mondays, Wednesdays and Fridays from 8:00 a.m. to 4:00 p.m., Tuesdays and Thursdays from 8:00 a.m. to 8:00 p.m., and Saturdays from 8:00 a.m. until noon; with extended hours, as required by DEA, in response to increases in the volume of contacts. THE POINT may be closed on the following observed State holidays: New Year's Day, Dr. Martin Luther King, Jr. Day, Memorial Day, Independence Day, Victory Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving Day, and Christmas Day; if any of such holidays falls on a Saturday, and if the State observes the day off on the following Monday, THE POINT may be closed on both the Saturday and the following Monday; if any of such holidays falls on a Sunday, and if the State observes the day off on the following Monday, THE POINT may be closed on the following Monday.
- The contractor will have a mechanism for routing after hour inquiries through a staffed answering service, either privately or publicly run, including 2-1-1 services.
- The contractor shall have THE POINT phones answered during emergencies, such as winter storms, power outages and hurricanes, by reasonable method such as emergency generators, forwarding of calls to staff working from one or more remote locations, and/or forwarding calls to 2-1-1 services, or other reasonable method.

General Requirements

The main, statewide office of THE POINT currently is administered by United Way of Rhode Island, Inc. ("UWRI") for a grant period that will expire September 29, 2014. In the event that the contractor selected is other than UWRI, the contractor must coordinate the transition of the main, statewide office of THE POINT from UWRI to the contractor, so that the main, statewide office of THE POINT will be fully operational under the contractor on September 30, 2014 and so that there will be no interruption in the operation of the main, statewide office of THE POINT. This transition includes causing THE POINT telephone line (401-462-4444) to be operational at the contractor. DEA will be responsible for causing UWRI to cooperate with the contractor in this transition; however, it is the contractor's responsibility to coordinate with UWRI prior to September 30, 2014 to ensure that this transition occurs without interruption in the operation of the main, statewide office of THE POINT. The contractor will not receive any additional funding or other compensation with respect to the obligations set forth in this paragraph.

DEA may explore ways that services provided by THE POINT may receive sustainable Medicaid funding for services provided, such as Options Counseling and assistance with Medicaid applications. The contractor shall cooperate in these efforts and may be required to enroll as a Medicaid provider with the State Claims Processing contractor (currently Hewlett Packard or "hp") in order to bill electronically for Medicaid-reimbursable services for clients.

The contractor shall comply with all DEA and federal program requirements, data collection requirements and reporting requirements related to the project within the required time frames, including without limitation the following:

- attend all required meetings, trainings, webinars, teleconferences, and conferences as required by the DEA project manager;

- maintain effective communication regarding grant activities with the DEA project manager and with other grant partners, when appropriate;
- clearly identify all personnel from the contractor who will work on this project;
- provide information requested by the DEA project manager in order to prepare all required reports;
- submit quarterly program reports and all other required project-related reports and other work products. Examples of required information will include, but not be limited to: unduplicated counts of clients served, service units provided, and documentation that the grantee has contributed its required matching share to the project.

SECTION 4: PROPOSAL

Narrative and format: The proposal should include specifically each of the following required elements:

A) **Technical Narrative** describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation (**the narrative is limited to ten (10) pages**, excludes any appendices and, as appropriate, resumes of key staff that will provide services covered by this request). The Narrative should describe the applicant's understanding of the State's requirement and a work plan for accomplishing the results proposed, including the following:

1. **Organizational Description, Capacity, Staffing** – Describe the organizational history, services and programs provided by the agency. Include here the agency's ability to work with the target populations identified in this RFP. Describe the qualifications, functions and responsibilities of staff members who will be involved with the program. Including, but not limited to, the following:
 - a. Articles of Organization of the Applicant; List of Board of Directors, By-Laws (or other appropriate ownership agreement, such as a partnership agreement, if applicable); &
 - b. Demonstration of Board (or partnership) endorsement, if applicable, supporting the organization's commitment to undertake the proposed project.

In this section the applicant also should demonstrate its proven experience in the following areas:

- Ability to develop materials for all levels of education/understanding.
- Provision of information to multi-cultural populations (at least two languages, in addition to English).
- Capacities to recruit, hire, train and sustain a qualified work force.
- Identify all staff and/or subcontractors proposed as members of the project team and the duties, responsibilities and concentration of effort which apply to each, as well as resumes, curricula vitae, or statements of prior experience and qualifications with complex public sector programs and/or benefit programs.
- Ability to generate sophisticated data driven reports on all program activities, as required by DEA and the U.S. Administration on Aging.
- Commitment of resources and staff to a social services and advocacy mission to link elders, adults with disabilities, their families and caregivers to information, services and support to ensure better health outcomes and choices for long term care.

2. **Project Plan** - Present a clear outline of the plan of work. Outline the overall goals of the project; the specific objectives; activities and services planned to meet the goals and objectives. Include an organizational plan that will ensure proper and efficient administration of the project, including the proposed location(s) and start-up date.

In this Section, the applicant also should address its ability to comply with **all** Section 3 Scope of Work requirements, including, but not limited to: Staffing Requirements, Required Technology/Data Collection/Reporting Capacity, Required Operating Hours and After-Hours Emergency Services, and ability to cause the main, statewide office of THE POINT to be fully operational on September 30, 2014 with no interruption in service.

Include an Evaluation Plan as to how the project will measure compliance with the required objectives.

3. **Budget and Financial Capacity**, including 1) the completion of the form which begins on page 12 of this application and 2) a budget narrative (**not to exceed three (3) pages**) which explains, in reasonable detail, the budget for the proposed project and which discloses all other sources of funding for the project. Including, but not limited to, the following:
- a. Most recent audited financial statements of the applicant. For agencies under \$250,000, either unaudited statements or a copy of agency 990 tax statement;
 - b. Current year operating budget including revenue sources and expenses;
 - c. If applicable, copy of 501 (c) (3) tax exempt IRS Letter, or that of the fiscal sponsor; &
 - d. If applicable, documentation of the applicant's federally approved indirect cost rate.

DIRECT/INDIRECT COSTS: In developing proposals, applicants should maximize the use of grant funds for the direct provision of services. In addition, the indirect cost rate for the proposal cannot exceed the lesser of fourteen percent (14%) or the applicant's current federally approved indirect cost rate; if the applicant has no current federally approved indirect cost rate, then indirect costs will not be permitted (the indirect cost rate is calculated by dividing the indirect costs of the project by its direct costs). For applicants that have no federally approved indirect rate, such applicants may propose to include in their budgets administrative costs that are directly attributable to the project which is the subject of this RFP; in such case applicants should include these costs as direct costs and should provide an explanation of the calculation of such costs. The Technical Review Committee may contact applicants to request clarification when there is a question as to whether it is appropriate for a proposed line item to be part of the budget.

SECTION 5: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. The proposal must receive a minimum of 70 (70%) out of a maximum of 100 technical points to be considered responsive. Any proposals scoring less than 70 points will be dropped from further consideration. Proposals will be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Organizational Capacity/Staffing Levels	30
Project Plan Quality	35
Budget Proposal	35
Total Possible Points	100

Points will be assigned based on the applicant’s clear demonstration of its abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal. Applicants may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in their proposal.

The Department of Human Services/ Division of Elderly Affairs reserves the exclusive right to select the applicant(s) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

SECTION 6: PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at David.Francis@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. Please reference **RFP # 7548738** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 574-9709.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties will be permitted.** Interested offerors may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases will not be considered.

Responses (**an original plus four (4) copies**) should be mailed or hand-delivered in a sealed envelope marked “**RFP# 7548738 RI Aging and Disability Resource Center (ADRC) – THE POINT**” to:

RI Dept. of Administration
 Division of Purchases, 2nd floor
 One Capitol Hill
 Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses shall include the following, in addition to the Proposal:

1. One (1) completed and signed four-page R.I.V.I.P generated bidder certification cover sheet (include in the original copy only) downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov.
2. One (1) completed and signed W-9 (include in the original copy only) downloaded from the RI Division of Purchases Internet home page at www.purchasing.ri.gov (included in the original proposal).
3. **A signed and sealed Proposal** including the **Technical Narrative** (describing the qualifications/background of the applicant and experience with and for similar projects) and **Budget and Financial Capacity** (reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project), as described in **Section 4** of this solicitation.
4. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in **electronic format (CD-Rom, disc, or flash drive)**. Microsoft Word /Excel OR PDF format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked "original".

APPENDIX A - BUDGET FOR 9/30/2014 – 9/29/2015

PROJECT COSTS

COST CATEGORY	TOTAL AMOUNT OF EACH COST (including DEA funding)	DEA FUNDING ALLOCATED TO EACH COST
<i>DIRECT PROGRAM COSTS:</i>		
PERSONNEL	\$	\$
FRINGE BENEFITS	\$	\$
CONSULTANTS	\$	\$
IN-STATE TRAVEL	\$	\$
OUT-OF-STATE	\$	\$
PRINTING	\$	\$
SUPPLIES	\$	\$
EQUIPMENT	\$	\$
EDUCATION MATERIALS	\$	\$
OTHER	\$	\$
TOTAL DIRECT CHARGES:	\$	\$
INDIRECT CHARGES (only may be requested if Provider has a federally approved indirect rate and not to exceed the lesser of (a) 14% or (b) Provider's federal approved indirect rate; to the extent funded by DEA funds, only can be requested on the DEA-funded portion of the direct charges):*	\$	\$
TOTAL PROJECT COSTS: *	\$	

* If Indirect Charges are being requested, a copy of the Provider's Federal Indirect Rate agreement must be included with this application and will not count toward any page limitation.

* The Total Project Cost, as well as all resources being applied to the total Project Cost, must be disclosed in this budget.

PROJECT RESOURCES

RESOURCES CONTRIBUTED BY AGENCY:	
USED AS MATCH:	
CASH	\$
IN KIND	\$
NOT USED AS MATCH:	
CASH	\$
IN KIND	\$
TOTAL REQUEST FROM DEA :	\$
TOTAL PROJECT RESOURCES (must equal total Project costs):	\$

BUDGET JUSTIFICATION

DIRECT PROGRAM COSTS - DETAIL OF PERSONNEL

NAME POSITION TITLE DESCRIPTION OF GRANT DUTIES	TOTAL ANNUAL SALARY \$	TOTAL ANNUAL FRINGE \$	TOTAL ANNUAL COMPENSATION \$	PERCENTAGE OF TIME DEVOTED TO PROJECT %	TOTAL AMOUNT (\$) CHARGEABLE TO DEA GRANT AWARD
TOTAL REQUEST FROM DEA FOR PERSONNEL					\$

DIRECT PROGRAM COSTS - DETAIL OF CONSULTANTS

NAME	POSITION TITLE	HOURLY RATE \$	NUMBER OF HOURS	TOTAL COST \$	TOTAL AMOUNT (\$) CHARGEABLE TO DEA GRANT AWARD
TOTAL REQUEST FROM DEA					

EXPLANATION OF ALL OTHER DIRECT EXPENSES

EXPENSE CATEGORY	<i>DESCRIPTION</i>	TOTAL COST \$	TOTAL AMOUNT (\$) CHARGEABLE TO DEA GRANT AWARD
TOTAL REQUEST FROM DEA			

EXPLANATION OF INDIRECT EXPENSES

EXPENSE CATEGORY	<i>DESCRIPTION</i>	TOTAL COST \$	TOTAL AMOUNT (\$) CHARGEABLE TO DEA GRANT AWARD
TOTAL REQUEST FROM DEA			

EXPLANATION OF OTHER RESOURCES APPLIED TO TOTAL PROJECT COST

DESCRIPTION	AMOUNT