

Date: April 17, 2019

Addendum Number: One

RFP Number: 002-19

RFP Title: Title III of the Older Americans Act, NSIP, Senior Community State Subsidy, and Alzheimer's Respite

Questions & Answers

Q1: Is this RFP for Emergency Response Systems? Is this for new companies trying to become providers, or do current providers need to bid?

A: The Title III RFP does not include Emergency Response Systems service. The Title III RFP is open to any bidder interested in becoming and or continuing to serve as a provider.

Q2: Is there a fillable Bidder's Information Form available?

A: Yes, a fillable Bidder's Information Form will be provided as an addendum to this RFP by 4/17/19.

Q3: I am unable to open or save Attachment One and have made several attempts. Can you help with this?

A: COA will forward Attachment One to the designated contact checked on the Bidder's Meeting Registration Form.

Q4: Just clarifying this is NOT for Home Health Aide Services for Hamilton County correct?

A: The Title III RFP does not include home health aide services for Hamilton County.

Area
Agency
on Aging

Serving
Butler, Clermont,
Clinton, Hamilton,
and Warren counties

Administering federal,
state and local programs
to enhance quality of life
for adults and caregivers

Established 1971

Q5: I am not sure what kind of proposal do we need to submit. Can you please elaborate?

A: Please refer to Title III RFP 002- 19, Section Two for an overview of services and Section Three for proposal submission requirements.

Q6: Is there a difference between the New Evaluation Responses vs. Past Narratives?

A: Evaluation responses are not limited to narratives but could include exhibits, examples, and lists to demonstrate compliance with service expectations.

Q7: How is this RFP different from previous RFPs?

A: Differences for this RFP are as follows:

- The prioritization of services differs as a result of data collected.*
- There is no bid bond requirement*
- Evidence-based program funding is not part of this RFP, but will have a separate funding application for providers and locations to receive funding.*
- Bidders are required to complete the free SAM Database registration.*
- Service Specifications updated.*

Q8: Can County ersi data from the US Census Bureau be used to help evaluate current and future needs instead of the 2010 Census provided?

A: Bidders may use County ersi data for responses to the RFP. COA will utilize the 2010 Census data for the RFP Funding Formula. COA's Funding Formula is only updated with decennial census data.

Q9: Do we know when the 2020 Census information will be available and will this be able to be used and adjusted during this contract on the future funding awards?

A: The 2020 Census data will be available in 2021. The 2020 Census data will be used in the next RFP cycle.

Q10: In reference to the Socialization/Visitation activity, does this have to take place in home or can it take place at the office/center, can it be a group setting?

A: Supportive Services such as socialization/visitation is a new and distinct service designed to be completed in the client's home. Recreation activities are designed for group activities at the center.

Q11: In the document: Title III Congregate Nutrition Program Sept. 1, 2016 it states: (C) (3) Carry out meals: The provider may not use Title III funds to pay for regularly provided carry-out meals, but may bill for meals sent home with consumers to prepare them for anticipated closing of congregate dining locations due to weather related emergencies. Please clarify: How do we determine who gets a meal. How do we bill for this? Can we use shelf stable meals for this?

A: An example would be to provide a meal to clients who are attending a meal site on Tuesday to use for Wednesday if there is an expected weather (snow) emergency for the next day with the understanding that if there is not a weather emergency- that they would not be able to attend a meal site on Wednesday since they have already received a meal.

- Meals are billed to the individual client.*
 - Shelf stable meals can be used for emergencies.*
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Q12: In the document: Title III Congregate Nutrition Program Sept. 1, 2016 it states: (C) (10) Regardless of whether the food items are purchased or donated, the provider shall only use food items from a source approved by the AAA. Is there a list of approved vendors we could receive? How do we get a vendor approved?

A: There is not an approved vendor list. Each request is evaluated individually for approval. Please contact Jennifer Lake, Nutrition Business Relations Partner, if seeking to have a vendor approved.

Jennifer Lake
jlake@help4seniors.org
(513) 814-4226

Q13: Can "we" bill for Non-Physical games such as Scrabble, Bunco, or Yahtzee? If so what is the criteria for the billing unit? It is listed in the Wellness Dimension policy as billable. What would be the correct procedure?

A: Recreation units of service are defined as "One scheduled hour (billable in 15 minute increments) of structured group activity with two (2) or more consumers in attendance. The facilitator/activity leader is not included in the count." Documentation requirements to support units of service are outlined in the Recreation Service Specification. Excluded activities listed in the service specification include, but are not limited to: Bingo, gambling trips, and gatherings of consumers (for example card and board games)

that do not include a facilitator providing instruction.

Q14: What order do you want the background checks completed? To be specific the order of the websites that need to be checked for a new hire. To clarify when you audit what will you look for during compliance audit when reviewing background checks.

A: Free Database requirements are outlined in OAC Rule 173-9-03, Reviewing databases. Providers can, but are not required, to organize database checks in the order listed in Rule 173-9-03. Free database checks must be completed prior to running the BCII Criminal Records Checks as outlined in 173-9-04, When to check criminal records, inform applicants, charge fees, and use forms.

Q15: How long do we have to maintain initial background checks on terminated employees?

A: Provider shall insure that any records relating to costs, work performed, supporting documentation for payment of work performed, all deliverables, and any other records necessary to fully disclose the extent of services provided under this Agreement are maintained and made available at all reasonable times for auditing or monitoring by COA, ODA, the state auditor, the inspector general, duly-authorized law enforcement officials, and agencies of the United States government (or designees of any of these entities). The above listed records and documentation are to be retained for not less than three (3) years from the expiration of this Agreement or submission of final report (whichever is later). If a monitoring or audit is initiated within the three (3) year period, the Provider shall retain the records until the monitoring or auditing is concluded and all issues or exceptions are resolved, even if doing so requires the provider to retain records for more than three (3) years.

Q16: When we submit the proposal what is the order you want the proposal submitted? Do you want the agency section duplicated for each program section?

A: The proposal submission checklist is suggested for use in organizing the proposal document.

Q17: Will you share the rate caps for each service?

A: Rate caps for Title III Services are based upon bid responses and are not available at this time. During the evaluation process, the range of service rates will be reviewed to determine whether a cost cap is needed.

Q18: If an agency is submitting a proposal for more than one program, should the Required Forms & Documentation, Financial Stability, etc. information be submitted for each program or is one copy sufficient?

A: If an agency is submitting a proposal for multiple services only one set of the Required Forms and Documentation must be submitted within the proposal. The RFP requires that 5 copies of the proposal, and 1 flash drive, be included with the original bid.

Q19: Are there page limits for the service sections?

A: Yes, service delivery responses are not to exceed two (2) pages.

Q20: Fidelity Insurance: #3 & 8 on Insurance question, is there 2 different policies needed or a specific amount?

A: Bidders must meet the insurance coverages and BWC requirements listed on page 37 of RFP 002-19. We ask that you request your insurance broker/carrier to list coverage that covers the requirements be listed on one ACORD 24 form, whether it is covered in one policy or several. If you do not retain an agent that can do this for all of your policies, please submit copies of any policies that would show proof of carrying the coverages required within the RFP.

Q21: Can the Federal/National rate for any hour of volunteer service be used to calculate the value of volunteer match?

A: If are you multiplying the national rate by the federal wage rate then yes. Please be aware that as part of a recent study, Ohio's volunteer rate was calculated at \$24.05 per hour. We would recommend using that number.

Q22: What are the percentages, or the amounts, of funding available in each county for Title III contracting?

A: The current distribution of funding is:

*12% area wide contracts (service all five counties)
19% Butler County
9% Clermont County
4% Clinton County
45% Hamilton County
12% Warren County*

Total Funding - \$7.2 Million

Q23: Will the database requirements be based on the new standard that was just released this week?

A: Yes, the database requirements for this RFP are based upon Ohio Administrative Code Rule 173-9-03 effective March 1, 2019.

Q24: Please provide clarification on Evidence-based programs provided in this RFP and the one that will be offered at a later RFP. Why are they separated?

A: The evidence based program application is being separated out because the current contracts have been confusing and yielded unspent funding. We believe this new method will allow for greater flexibility for communities to participate in evidence based programs, and simplify the use and administration of the evidence based funding.

Q25: Can you please give some additional clarification on what nutritional services/programs are required to be offered in our congregate meal programs?

A: Nutrition Education is required two times per year for the congregate meal programs. Topics of nutrition education are flexible to meet the needs of your clients. Examples include a nutrition handout approved by COA Dietitian or class presentation by a Registered Dietitian. Contact Jennifer Lake RDLD for assistance with handouts or to schedule a nutrition program.

Q26: Should the program income reported monthly in the Zoomerang not be factored into the match? Should it be considered dollars above and beyond the match?

*A: Correct, Program income reported in Zoomerang does not count towards your required match
Correct, it is considered as additional dollars going towards the program.*

Q27: Should matching funds be allocated evenly throughout contract period or should we only report actual cash received each month within the contract period? For example: We have a 5K fundraiser in September. Should matching dollars from that fundraiser be reported all in September or 1/12 each month?

A: The money needs to be reported in the month received.

Q28: How much funding was allocated for transportation in 2018? Percent of total IIIB & SCS Funding?

*A: 19% of total Title III service funding was allocated to transportation
45% of Title III-B went towards transportation, 69% of SCS funding went to transportation.*

Q29: Can you use income from other sources as non-Federal matching funds?

A: Yes, you can use State and local funding just as long as it is not federal.

Q30: If contract is awarded, say for transportation, will you provide us with a list of consumers seeking transportation?

A: No, COA will not provide client referrals.

Q31: What is the allocated funding for transportation by county?

A: The current allocations of transportation funding is as follows:

*Butler: \$313,786
Clermont: \$295,806
Clinton: \$35,849
Hamilton: \$713,515
Warren: \$81,510*

Q32: How do we calculate voluntary services cost, is it on an hourly basis? How do we determine the amount? Is it based on their calculation?

A: The cost would be based on an hourly rate. For example, you could use the federal wage rate of \$7.25 times the national volunteer rate for Ohio of 26.61% to calculate a volunteer rate of \$9.20 per hour.

Q33: In the case of transportation services, who will be authorized to use this service? Anyone who is 65+?

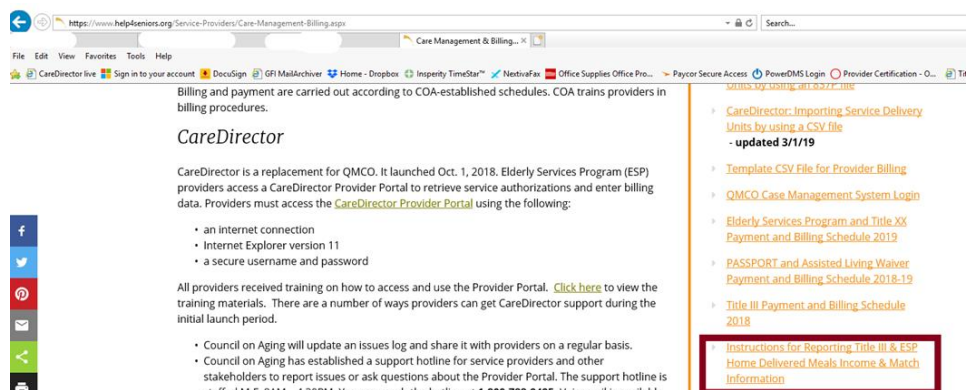
A: Individuals residing in Butler, Clermont, Clinton, Hamilton and Warren Counties age 60 and over are eligible to receive Title III transportation services. This contract is different from the ESP and PASSPORT contracts. COA will not provide client referrals. The provider is responsible for securing their clients.

Q34: Can we do both medical and non-medical transportation with this funding?

A: Title III Transportation can be provided for purposes of transporting an individual to a medical office, congregate nutrition program site, grocery store, senior center, or government office. These are only a few of the examples of locations for which transportation can be provided.

Q35: Can you provide a copy of what the monthly income reporting Zoomerang survey looks like?

*A: You can find the directions, which also contain the reporting survey web link and screenshots of the survey, on our website at: <https://www.help4seniors.org/Service-Providers/Care-Management-Billing.aspx>, in the right-hand margin under the **Related Information** section. Please see the screen shot below for reference.*



Q36: Can you provide a list of acceptable items to use as match?

A: Volunteer Hours, United Way Money, grant money from a City, grant money from the State.

Q37: What is the Title III distribution by county?

A: The current distribution of funding is:
12% area wide contracts (service all five counties)
19% Butler County
9% Clermont County
4% Clinton County
45% Hamilton County
12% Warren County
Total funding - \$7.2 Million

Q38: Do providers that are not bidding on Congregate Meals or Home Delivered Meals have to provide documentation for food safety?

A: No, only providers bidding on Congregate Meals or Home Delivered Meals are required to provide documentation for food safety in the 1st level evaluation.

Q39: Is the Adult Day Service covered in this RFP for Clermont County only?

A: Yes, the Adult Day Services and Home Delivered Meals covered in the federal funding for this RFP are for Clermont County only. There will be separate RFPs for the Adult Day Services and Home Delivered Meals for the remaining 4 counties.

Q40: Will the increase of database checks be in effect for this RFP?

A: Yes, all bidders must be in compliance with the 7 free database check requirement.

Q41: Can match money come from your own company?

A: Yes.

Q42: Can match money come from client voluntary contributions?

A: No.

Q43: How do we get clients for Title III?

A: This contract is different from the ESP and PASSPORT contracts. We do not give you client referrals. The provider is responsible for securing their clients.

Q44: Can we limit our service area and/or capacity?

A: Yes, and you would include that type of information in your response to the RFP.

Q45: Does Transportation have a flat rate and is there more than one vendor per county?

A: Yes, transportation is reimbursed at a flat rate per unit. There can also be more than one transportation vendor per county.

Q46: How do we budget?

A: Follow the directions when filling out Attachment One – Budget Worksheets of the RFP to determine your proposed budget.

Q47: What is the five year history of the amount of funds COA has to contract for these services?

A: The five year trend of funding availability is flat. The ten year trend of available funding has decreased by almost \$900,000.

Q48: Does COA retain any of this funding for programs it operates? What are those programs and what is the five year history of support for those?

A: COA has designated funding from the Department of Aging for Area Agency on Aging responsibilities. This funding is \$518,674 which has also declined over time.

COA uses some Title III funding to operate the Aging and Disability Resource center for information and referral as approved in the Area Plan. There is also some funding for caregiver care coordination and evidence based care transition services. You can find the area plan on COA's website.

Q49: Given that the number of senior centers is now lower due to many having closed, has there been a drop in the number of contracts for Title III? Are there any implications for current bidders?

A: From the 2015 RFP, only two providers (CERV and Senior Independence) have terminated their contracts. One of the two was a new provider that never started.

COA has sought new providers to cover congregate meals as senior centers have closed. We were successful in most communities to find a provider who was able to replace the congregate dining services that were lost with the senior center closure.

This RFP provides an opportunity to demonstrate ability to provide services to communities that are underserved.

Q50: What percentage of COA's Title III allocations have been drawn down by contracted units?

A: Approximately 85%

Q51: I am unable to locate the new State Plan on your website. Could you guide me to it or provide a link please?

*A: The 2019-2022 Strategic Area Plan can be found on our website here:
<https://www.help4seniors.org/Find-Resources/Document-Library/>, at the bottom of the web page under the Strategic Area Plan header.*

Q52: My question for you is about Home Delivered Meals and T3 billing. In the RFP packet it states we are required to bill HDMs in SAMS. My question is are we now supposed to bill HDMs through SAMS? We bill our HDMs through ESP, PASSPORT/MyCare Ohio, and private pay invoices through SSAID. Please clarify the requirement.

A: The Title III RFP includes the service of Home Delivered Meals for Clermont County only. For the purposes of this RFP, Home Delivered Meals for Clermont County are billed in SAMS. Providers contracted for Home Delivered Meals for the ESP and PASSPORT/MyCare Ohio programs will continue to bill via contractual requirements.

Q53: In submission requirement #3, it asks for the most current interim financial statements. Does that mean statements for the current year (e.g. 1/1/19 – present)?

A: If the financial year runs on a calendar year, then yes. The time period for the statements would be 1/1/2019 to present.

Q54: Do you have RFP Forms for Section Six of the RFP that can be filled out on the computer as a Word document?

A: All forms outlined in Section Six will be made available for bidders to insert text in required fields.

Q55: Does COA have a preferred method for receiving the original and five copies of the RFP? (Three-ring binder, etc.)

A: No, COA does not have a preferred method for receiving the proposal.

Q56: When requesting information on additional locations is it referring to the locations pertaining to this RFP or all locations run by the entity?

A: Additional locations will include the physical space where services are delivered and or business personnel with oversight of the services are located.

Q57: The application packet includes a notarized affidavit for personal property tax and a second about debarment, suspension, etc. Neither of these seems to apply to our non-profit corporation. May we write that at the top of a form that has not been completed for the submission requirement or must we complete the document with notarization?

A: Scoring plays a major factor in the evaluations of bids. Not submitting documentation counts as a negative which would lower your overall score and make your proposal incomplete. If the personal property tax form does not apply to your business, for example you lease your property and do not pay property taxes for it, then it would be in your best interest to submit the form noting that it is not applicable as a response. The remaining forms are required for all businesses, including not for profit entities.

Q58: Concerning the two types of Caregiver service, we have historically provided both types under the Counseling title. Is it necessary to separate these to be considered in this year's bid? Is it possible to submit one combine request, given that this is a small but important service that we have been successfully providing?

A: The RFP requires bidders to submit a rate and corresponding budget worksheet for each of the FCSP Caregiver Services outlined in this RFP.

Q59: What is our NPI# listed on the Bidders Information Form?

A: NPI = National Provider Identifier

A National Provider Identifier is a unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services. The NPI has replaced the unique physician identification number as the required identifier for Medicare services, and is used by other payers, including commercial healthcare insurers. The transition to the NPI was mandated as part of the Administrative Simplifications portion of the Health Insurance Portability and Accountability Act of 1996. Not all types of businesses are required to have an NPI #. If you are unsure if your company has been assigned an NPI # you may look this information up at <http://www.npinumberlookup.org/>. Please be aware

you cannot use punctuation in the search bar of this site or you will get an error.

Q60: Are there page parameters such as font size and margins?

A: No, the Proposal Submission Checklist only outlines page limits for bidder responses. COA would encourage bidders to use a reasonably sized font to allow for readability.

Q61: In reference to the Evaluation Responses page limitation, do you want copies of our procedures for areas such as Continual Quality Improvement Process, Staffing, Compliance with Service Delivery Specifications and NAPIS?

A: The intention of this question is for the bidder to provide a description of their agencies operations as it relates to this RFP versus including copies of your procedures. The evaluation team will review the bidder's response in order to assign a point value to the question. Copies of procedures are not required.

Q62: What financial information is required for the Title III RFP?

A: A Provider needs the following:

- 1. A full copy of the most recent audit report of the agency, or a complete copy of the latest tax return for the agency.*
- 2. The Balance Sheet and Income statement of your agencies current financials (interim reports) which has recently completed (certified as being true and correct by the chief financial officer)*
