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Date: February 25, 2022
Addendum Number: One
RFP Number: 001-22
RFP Title: ESP Independent Living Assistance Services

Questions & Answers

Q1: Where can I find more information about the independent living assistance program?

A1: Please review the RFP for more information regarding this service.

RFP 001-22 can be found on the COA website here <https://www.help4seniors.org/Service-Providers/Elderly-Service-Program/ESP-Request-Proposals.aspx>.

Q2: We no longer have Independent Living Services so I do not believe this would pertain to us, correct? Please advise.

A2: Due to the competitive nature of the RFP process we cannot advise if your agency should or should not consider this RFP.

We would recommend reviewing the Service Specification listed within the RFP and make a decision on the ability and desire to provide the Independent Living Assistance (ILA) service based on that service description.

Q3: Is the Personal Emergency Response Systems and Service included in this RFP for these three Counties?

A3: Please review RFP 001-22: ESP Independent Living Assistance (ILA) on our website to see more details about the service involved. Per the service specification, Personal Emergency Response Systems is not a part of this service.

You can find RFP 001-22 on the COA website here - <https://www.help4seniors.org/Service-Providers/Elderly-Service-Program/ESP-Request-Proposals.aspx>.

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Council on Aging is designated by the state of Ohio to serve older adults and people with disabilities within a multi-county region. We are experts at helping people with complex medical and long-term care needs, offering a variety of services via publicly funded programs. Our mission: *Enhance lives by assisting people to remain independent through a range of quality services.*

Q4: I did not file taxes in 2020-2021 for my business because I just started operations late in 2021. My question is what type of documentation would I need to show the taxes portion of the proposal?

A4: Please provide a balance sheet and income statement from day 1 of your business to December 31, 2021.

Q5: We currently are a provider as a home delivered meal provider serving members in the Hamilton, Warren, and Butler area. I am new in my role and want to ensure that I am correct with the below information. According to the RFP 001-22 ESP Independent Living Services this is not related to home delivered meals.

Can you assist in clarifying?

A5: Please review the Service Specification listed within RFP 001-22 for clarification to help you understand what Independent Living Assistance services consist of. Per the Service Specification, meals are not a part of this service.

You can find RFP 001-22 on the COA website here - <https://www.help4seniors.org/Service-Providers/Elderly-Service-Program/ESP-Request-Proposals.aspx>.

Q6: I am working on our proposal for ESP and for our first level evaluation what should we submit since last year was our first year in business and we have not done our taxes yet?

A6: Please provide a balance sheet and income statement from day 1 of your business to December 31, 2021.

Q7: Once I click on the link above, it is only taking me to the screen for Elderly Services Program – Independent Living Assistance.

Does this apply to our agency?

A7: Please read the original email carefully as it explains why your agency is receiving the notice of an RFP being posted on COA's website.

Q8: I am inquiring about the RFP for elderly services program independent living assistance. Where do I locate the bid sheet on excel?

A8: Thank you for your interest in RFP 001-22: ESP Independent Living Assistance Services.

You can find RFP 001-22, and all Attachments referenced in the RFP, on the COA website here - <https://www.help4seniors.org/Service-Providers/Elderly-Service-Program/ESP-Request-Proposals.aspx>.

Q9: As far as putting in a bid for elderly services, Should I print the form out in order to get the document notarized before sending it in?

A9: Documents that require notarization will have to be notarized either electronically or physically and included in proposal submission.

Q10: I read over the requirements needed, should I resend proof of my documents, or would that already be in the system since I'm already a passport provider?

A10: All Bidders interested in providing the service listed in RFP 001-22: Independent Living Assistance Services must submit a complete proposal which includes all documents requested in the RFP.

Q11: Can you provide the previous bid rate information for providers operating this program currently?

A11: All Bidders should provide a rate reflective of the skills necessary in meeting the service specifications. The service specifications can be found in RFP 001-22: Independent Living Assistance Services.

Q12: Can you share on average what is the typical caseload of clients providers work with?

A12: Caseloads vary depending on the county, the number of active providers within that county, and the client ILA service needs (Refer to Section Four of the RFP - Independent Living Assistance Service Specification Section 3.0).

Q13: Is there a sample of a completed rate bid sheet, as we are new to the RFP Independent Living Assistance bid proposal?

A13: Please refer to Attachment 1- Bid Rate Sheet for Independent Living Assistance for instructions on how to complete the bid rate sheet.

Q14: Pages 7 - 10 of the RFP indicate the number of clients receiving Independent Living Assistance in January of 2022. Could you please share the approximate number of total Elderly Services Program clients in each zone and county during the same period?

*A14: The number of ESP clients varies per county.
Data from the COA FY2020 Annual County Reports lists the approximate number of ESP clients per county to be as follows:*

*Butler - 4,317
Hamilton – 9,159
Warren – 2,466*

Q15: On average, how many clients are referred for Independent Living Assistance by Council on Aging per month?

A15: The average of ESP referrals varies per county, per month.

Q16: Are providers awarded the bid required to accept all referrals for ILA services? If no, please describe any exceptions.

A16: Bidders awarded a contract are awarded counties and zones dependent on their proposed region. They are eligible for accepting referrals in the counties and zones they have been awarded.

Q17: Per page 11 of 64, Service Specification Section 2.0, "A unit of service is equal to 15 minutes." On average, how many units are authorized for ILA services per client in total? How many units per week? Per month?

A17: The number of units varies depending on the client need. Based on the client service data from the COA FY2020 Annual County Reports the annual average ILA units per client are:

*Warren County: annual average of ILA units per client = 44 units
Hamilton County: annual average of ILA units per client = 48 units
Butler County: annual average of ILA units per client = 56 units*

Q18: Per page 11 of 64, Service Specification Section 2.0, "A unit of service is equal to 15 minutes." Could you please clarify if a minimum of one (1) unit is billed for any time spent between 1-15 minutes? In other words, if an ILA worker spends 25 minutes completing an authorized task, would the provider bill one (1) or two (2) units?

A18: Please reference the grid below on how to round unit amounts for billing.

Rounding to the proper quarter hour

To ensure consistent time entry, clock in and out times should be rounded to the nearest quarter hour based on 7-minute time increments.

Clock time	Quarter Hour	Billable Units
:00 - :07 minutes	.00	0
:08 - :22 minutes	.25	1
:23 - :37 minutes	.50	2
:38 - :52 minutes	.75	3
:53 - :60 minutes	1.00	4

Time from 1 to 7 minutes should be rounded down to the nearest quarter hour; time from 8 to 14 minutes should be rounded up to the nearest quarter hour.

Q19: Acknowledging the ILA services listed in Section 3.0 on pages 11 - 12 of the RFP, could you please clarify if the units billed for time spent on these activities must be for direct service provided to the client (i.e., phone conversations and/or in-person meetings with the client) or if

time spent indirectly addressing these needs is also permissible for billing? Examples include, but are not limited to:

- o Attempted contacts to the client (unsuccessful contact).
- o Communication with approved team members and/or COA Case Manager.
- o Research and/or completing tasks on the client's behalf.
- o Documentation of activities.
- o Travel.
- o Initial home visit completed by the ILA Supervisor per Section 7.0 on page 14 of 64 of the RFP.
- o Training.
- o Startup activities.
- o Administrative activities.

A19: Only direct services completed are billable units per the grid in Answer #18.

Q20: Acknowledging the ILA services listed in Section 3.0 on pages 11 - 12 of the RFP, could you please clarify if time spent on related activities that do not fit these specifications is also permissible for billing? For example, advocating on the client's behalf to prevent utility shutoffs may not fall directly within "Completion of Applications and Program Review", "Bill Pay" or "Banking".

A20: Per the cited example this would fall under the Service Specification. Please reference the Service Specification for further clarity.

Q21: Page 13 of 64, Section 5.0 describes the qualifications of ILA worker. Could you please clarify if there are minimum requirements for education and/or years of experience for this position, in addition to the necessary skills and knowledge?

A21: The required qualifications for the ILA worker are outlined in the Service Specification found within the RFP.

Q22: In reference to page 14 of 64 of the RFP, "The Supervisor must complete and document an initial home visit to develop the client's task sheet to meet the needs of the client, assuring consistency with the Care Manager's authorized care plan." Are there any exceptions to completing the home visit in-person? Is a telephonic appointment permissible if requested by the client?

A22: Due to the nature of ILA services the initial in-home visits are required.

Q23: Per page 18 of 64, the RFP indicates Council on Aging reserves the right to award this bid to multiple providers. How many providers are furnishing the Independent Living Assistance service today?

A23: The number of providers varies per county. The current provider average is 3.

Q24: Can you share the names of the current providers/incumbents?

A24: Due to the competitive nature of the RFP process this information is not vital for a bid submission. Current ESP ILA Providers are not guaranteed a contract outside of the RFP process but must submit a proposal to try to be awarded a new ILA contract.

Q25: Since more than one provider will receive the award, how will clients be assigned to providers? What criteria will be used to make such determination?

A25: Clients have self-determination to choose a provider from those contracted in their region.

Q26: If provider receives funds from a levy that overlaps the Independent Living Assistance in a county, can the provider proceed with submitting a proposal for that county and other counties if there are no conflicts or duplication of services?

A26: Due to the unknown factors required by "other" funders we are unable to provide clarity for this question.

Q27: If I submit a proposal for an RFP, will I automatically receive a contract?

A27: Being a current COA provider, or submitting a proposal to an RFP, does not guarantee a contract as this is a competitive process in which the proposals are evaluated and scored/ranked. That score/rank helps to determine if your company would be awarded a contract.

Q28: Section Three: Demographics

- How many ILA providers are there presently providing ILA services in Butler and Warren County? Are these the providers that are providing these approximate number of ILA clients? How come there are so few Warren County clients? Did Warren County just recently receive this service?

A28: Currently COA has one provider in Warren County, two providers in Butler County, and one provider in Hamilton County. Some ILA providers are experiencing staffing and capacity issues. COA desires to procure providers for Independent Living Assistance (ILA) services to meet the needs of the clients and the ILA service. This is not a new service for Warren County ESP clients.

Q29: Section Four: Service Specifications

- What are the qualifications for the ILA Worker? Are there any schooling or past experience needed?

- After the ILA Supervisor does the initial home visit and develops a list of needs of the client, should they assure consistency with the care manager?

A29: Please refer to Answer #21 above.

Please refer to section 7.0 (C) ILA Supervision of the ILA Service Specification listed within the RFP.

Q30: Section Seven: Proposal Evaluation

- Can you elaborate on, "this may determine where specific contract awards are made with respect to multiple variables?"

- Initial and Annual Assessments, are these the ones the ILA Supervisor is supposed to complete on the needs for the clients?

A30: Multiple variables means the evaluation process reviews several factors as listed in the Evaluation grid of the RFP to help determine how bids are ranked and contracts are awarded.

Yes, this is referencing the Initial and Annual Assessments conducted by the ILA Supervisor as outlined in the Service Specification in the RFP.

Q31: Section Ten: General Terms and Conditions

- What are examples of products and services to be used for ILA services?

A31: Product and services in this context is referring to the ILA service under bid for contract with this RFP.

Q32: Appendix A: Emergency Preparedness Plan

- Can you elaborate on #8? What are the readiness activities such as planning for emergencies, tabletop and other exercises, and providing contact and other organization information?

A32: Any ESP contracted Provider must be willing to participate in any emergency preparedness activities COA may choose to conduct to ensure that the Provider Network is prepared to operate through an emergency.

Q33: Appendix B: Computer Hardware and System Requirements

- Is the software that is referenced, Care Director? If not, what is the software that is referenced?

A33: Yes, this is referring to CareDirector.
