ST. LOUIS AREA AGENCY ON AGING

AMENDMENT # 1
REQUEST FOR PROPOSAL

SLAAA - All Services RFP (11/25/2014): Pages 1-41, including Exhibits A - DD and Attachments. This document constitutes an official amendment, dated **12/10/14**, to the said RFP and is considered to be part of the original.

Please follow the instructions below:

Remove - All Services RFP , dated 11/15/14, pgs 8 & 40 of 41
Insert - All Services RFP , dated 12/10/14. pgs 8 & 40 of 41

Remove - Exhibit R, dated 11/25/14.
Insert - Exhibit R, dated 12/10/14.

Remove - Exhibit W, dated 11/25/14
Insert - Exhibit W, dated 12/10/14

Insert - Exhibit X, dated 12/10/14 pg X-1
Insert - Exhibit X, dated 12/10/14 pg X-3

The BIDDER must respond to the Request for Proposal (RFP) by submitting all data required herein in order for the proposal to be evaluated and considered for award. Failure to submit such data shall be deemed sufficient cause for disqualification of a proposal from further consideration for award. Proposals may be delivered by mail or hand carried to the following address:

St. Louis Area Agency on Aging
Attn: All Services Bid
1520 Market St., Room 4086, St. Louis, MO 63103
Office Hours: 8:00 a.m. – 5:00 p.m.

No proposals will be accepted after 9:00 a.m. on Jan 30, 2015 for All Bidders.
Any RFP proposal received by SLAAA after the exact closing date and time will not be evaluated regardless of the reason related to its lateness.

David P. Sykora
Executive Director
St. Louis Area Agency on Aging

12 /11 /2014

PART SIX

ATTACHMENTS

Submit all Proposals in the following order:

COVER

Attachment A - Bid Cover Sheet

Attachment B - Completed RFP Checklist

Attachment C - Contractual Provisions

Attachment D - Bid Submission Sheets

Attachment E - Operational Plan/Scope of Work
~~(including Sealed Financial Statement)~~
- Bidder's Experience & Expertise
- Organizational Chart

Attachment F - MO Certificate of Corporate Good Standing
City Business License
Verification of Liability & Required Insurance
Employee Dishonesty Bonding

Attachment G - Latest Audit, IRS form 990

Attachment H - Assurance Certification

Attachment I - Statement of Liens & debts

Attachment J - Conflict of Interest Policy

Attachment K - Living Wage Documents
Certification; Acknowledgement & Acceptance Declaration
Articles of Incorporation; By-laws

Attachment L - Memo of Understanding Regarding Emergencies & Disasters Inclement Weather/Emergency Services Plan

Attachment M - ADA Compliance Form

Attachment N - Affirmative Action Form

Attachment O - Certification of Debarment

Attachment P - Lobbying Disclosure

Attachment Q - Affidavit of Work Authorization

Attachment R - Workers Compensation

EXHIBIT R

FREQUENTLY ASKED QUESTIONS AND ANSWERS

The following questions have been frequently asked in the past. Questions have been summarized to assist in understanding the question. The answers provided are considered to be the official answer from this agency. This Exhibit will be expanded throughout the process as needed.

1.) *Do attachments have to be on all six (6) copies or just the original?*

A: The Proposal must be received with one original and 6 copies with all Attachments and Exhibits that are requested. There are two reasons for this: 1) Each Committee member must receive a complete copy of the proposal in order to fairly evaluate the contents. 2) When the contract is awarded and the complete contract constructed for signature, it must go as a complete document with copies to the various departments within the City.

2.) *How much information should be included in our responses?*

A: Bidders should provide the amount of information that they feel is necessary for the CITY to make a positive determination on the proposal. At a minimum, the bidder MUST submit the specific information requested for the bid to be accepted.

3.) *If all of our insurance policies are listed in one letter from the agent, is this sufficient or do you need a separate one for each policy or just the front page from each policy?*

A: If all of the information requested is on one page, then that is sufficient. SLAAA must be listed as the Certificate Holder on all policies.

4.) *We have to give you 90 days notice to terminate our contract. You are only obligated to give us 30 days. A:* **Yes, that is correct.**

5.) *In Exhibit Ea, there is reference to "Contract Titles". Do employee resumes of key personnel get placed in this section?*

A: **Exhibit Ea is used to describe PAST experience in the service category that you wish to bid for. What was the Contract Title that you operated under? Who awarded you the contract? Who can we call for references, etc.? Resumes may be placed in Attachment E as you deem appropriate.**

On page 11 of the RFP document, it calls for "information related to previous and current contracts, which are considered identical or similar to the requirements of this RFP." Does this mean only SLAAA-related contracts—or all State, Federal, and Local contracts to provide services? For example, our agency administers an extensive Head Start contract, which has many similar financial, reporting, and legal requirements—should we provide SLAAA with information about that contract?

A: We mean all related contracts, not just SLAAA related contracts. We want to know your history of servicing similar contracts, their size, scope, etc. Please list all that you feel will help us determine your ability to satisfactorily meet our contract requirements.

6.) *Should I submit my bid in a binder or folder?*

A: We would prefer that you use the least amount of binding, covering, etc. as possible. We will have to remove all of the bids from the binders.

7.) *The RFP states- "The BIDDER should provide an "Organizational Chart" <Attachment >, showing staffing and lines of authority for the key personnel to be used…' Please elaborate on this item.*

A: We want a detailed chart delineating the Key Decision Makers, Lines of Authority and the Emergency Contact persons within the Agency. It is critical to have a Disaster Planning Procedures in place. We want to know who we must contact and deal with in the event of an emergency. We will work further with the bidder that is awarded the contract.

The Organizational Chart will serve as the focal point for the Disaster Plans that we want in place .We will work with the bidder that is awarded the contract to flesh out this requirement.

8.) *Please discuss the living wage requirement. Can it be waived?*

A: **The Living Wage Rate is NOT required for vendors. Not-for-Profit agencies are also exempt.**

9.) *In regards to case management, is a unit an older adult who receives case management or is a unit an hour of case management?*

A: A unit is an hour of case management.

10.) *What is the maximum number of case management hours that a client can receive within the time from of 07/01/15 to 6/30/16?*

A: Effective July 1, 2009, SLAAA reimburses providers for a maximum of 12 units of service for each new client added after July 1, 2009. This includes any combination of title III and/or FCG services.

11.) *Can you talk about the reporting that is required to become a contractor for case management services? Is there monthly reporting? Annual reporting? What specific kind of information needs to be tracked about the clients served?*

A: There is a monthly report required as well as an annual report. Regarding specific information needing to be tracked about clients served, please see a copy of the current assessment.

12.) *With the National Aging Program Information System (NAPIS), will an agency receive free access to this once an approved contractor? Can access to this database be given to multiple people who are providing services at the agency?*

A: There is a license and there are seat costs to have access to NAPIS. The cost for the license and one seat is $660 per fiscal year. This is subject to change. Multiple sign-ins can be provided to one agency, but only one user can be signed in at a time. If you want multiple staff to have access to the database at the same time, you will want to purchase an additional seat.

13.) *It states in the sample contract that 1/12 of the maximum reimbursement amount is given monthly to a contractor. Does a contractor submit information on units served to get this reimbursement monthly? If a contractor serves more units that month, can a contractor ask for a higher reimbursement amount?*

A: Yes, the contractor submits information on clients served to receive the monthly reimbursement. If a contractor serves in excess of the monthly allotment, those units are banked. They will be paid during those months that you do not reach your monthly maximum. Additionally, we analyze all utilization after 6 months and amend the contracts to either increase or decrease units so as to ensure maximum utilization of our funds. However, there is a set amount of units available as stated in the contract so if you exceed your allotment, you might have to scale back in later months.

14.) *Does SLAAA provide an agency with a specific assessment form that must be used when completing the initial in-home assessment? If so, how many pages is the form? Approximately, how long does it take a case manager to complete the form? If there is a specific initial assessment form used, can I receive a copy of this form?*

A: Yes, SLAAA provides the specific assessment form that agencies must use. The current assessment is 17 pages in length. This is subject to change. The time it takes to complete the assessment varies depending on the ability of the client and the ability of the Case Manager. Generally, the time ranges from 1 to 2 hours.

15.) *Are all adults that live in the City of St. Louis that are 60 years of age and older eligible for case management services? Are there any people who are not eligible? Are there any income guidelines? Are older adults living in subsidized senior apartment buildings with access to a service coordinator eligible for case management services?*

A: Yes, all adults 60 years of age or older living in the City of St. Louis are eligible for Case Management. SLAAA screens clients to help make sure the referral is appropriate. There are no income guidelines. Yes, persons 60 years of age and older living in subsidized senior apartment buildings are eligible.

16.) *Can you give me some examples of the definition of a unit and then unit cost in regards in providing case management services? Is a unit cost an hour of case management services? Could there be a unit cost for the time it takes to complete the initial in-home assessment? Could there be a unit cost for the time it takes to complete phone calls, follow up visits, etc. after the initial in-home assessment? For example, if I want to serve 40 clients through this contract, would there be one unit of cost per client?*

A: The definition of a unit is one hour of service. The accumulated time for follow-up, phone calls, etc. is paid in one (1) hour increments.

17.) *Can you please specify which RFP (or related) document(s) reference a required match and match ratio?*

A: ***Please see ALL Svcs RFP, Page 19/41, Para 9 Reimbursements subparas c & d***

If a match is required for this proposal, can the cash match be in the form of Employer's cash payment of employer taxes or salary for caregivers proving services under this program? A: ***YES***

Please clarify the matching ratio which states that contracts in the amount of 90% must have a 10% match.

A. This question is best answered with an example. If the amount approved to the contractor is $9,000, then the contractor needs to have matching resources in the amount of $1,000.00. The total amount used by the contractor to provide case management services for older adults would be $10,000. 30% of the match,$300, needs to be actual cash. 70% or $700 could be in-kind, such as volunteer time, space, equipment.

Any DONATIONS received from the client are considered "Program Income" by Federal law and must be reported as such. The "Program Income" must be spent first, before granted funds, on the case management service. In this example, the total amount used by the contractor to provide case management services for older adults would be $10,000 plus whatever Program Income is received.

SLAAA funds are NOT designed to cover the entire cost of ANY service.
Client Contributions must be solicited and the match must be provided by the CONTRACTOR.

18.) *In Exhibit B, the Request for Proposal Checklist, does the executive director initial all of these items or can another staff member do this?*

A. The Executive Director will sign all forms unless authority has been delegated to another person. Please include a letter, a memorandum, a copy of Board minutes, etc. that shows that the authority to sign has been delegated.

19.) *If an agency doesn't currently have a business license in the City of St. Louis, do we need to apply for one before it is determined whether a contract has been awarded to us? Can we wait to see if we are awarded a contract before applying for a business license?*

A. See the Page 14 of 41, Para 8 <u>NOTES TO BIDDERS</u>, sub-paragraph d.

20.) *If the Request for Proposal Checklist says Completed/Signed, do we need to provide additional documentation?*

A. This means that you must COMPLETE the Form and SIGN it.

21.) *If the Request for Proposal Checklist says Verification, does that mean we need to update or is what you have on file adequate?*

A. This means you must submit the document requested. No signature is required.

EXHIBIT R

22.) *We anticipate bidding and submitting rate sheets for services such as: Respite, Case Management, Caregiver Respite, & In-home Services - Are we to propose a unit rate or are the rates established by SLAAA for these services under this RFP? In other words, are we to submit our usual and customary rates for services per unit of care?*

A. You are to propose a unit price for each service. After receiving all bids, SLAAA will negotiate rates as necessary.

23.) *We understand that if selected as a CONTRACTOR, we would prepare an operating budget. Is this correct, that a budget would follow notification of an award?*

A. Yes, the BUDGET will be required after the award is made.

24.) *Will the SLAAA website post all the correspondence regarding this RFP?*

Yes, all correspondence (the original RFP w/exhibits and future Amendments), will be posted. All persons picking up an original bid packet will be notified by email that updated information is posted.

25.) *Page 40 of the RFP, "PART SIX, ATTACHMENTS", lists the order for proposal submittal. Attachment E Operational Plan/Scope of Work states "(including Sealed Financial Statement). However, the RFP makes no other mention of a requirement for this sealed statement. Please clarify what this requirement entails.*

This statement has been voided. Attachments G & I will suffice.

26.) *Can we attach or submit letters of support with the application? If so, where should we put them?*

We do NOT want Letters of Support. Your plan and related documents should be sufficient to help us determine the worthiness of the application.

27.) *How do you calculate the number of service days?*

The minimum number of service days is 248. This includes Monday through Friday, minus holidays. This can increase if senior centers choose to serve meals on Saturdays, etc.

28.) *Where can we find the questions originally submitted for the 2016 RFP cycle? How long are questions allowed?*

The questions found in Exhibit R, # 28 to #33, were submitted by December 5, 2014. Questions may be submitted until the bid submission deadline (January 30, 2015 at 9:00 am).

29.) *When does our liability insurance need to be in place?*

A contractor's liability insurance and performance bond are due June 15, 2015, fifteen (15) days before the contract start date.

EXHIBIT R

30.) *Is a City Business License required for all contractors?*

A City Business License must be obtained and city earnings tax must be paid (if applicable) before the contract can be processed by the City of St. Louis. A City Business License is easily obtainable in the ninety (90) day period between the award date and the contract start date.

Not-for-Profit agencies are not required to have a City Business License.

31.) *Will the contract allow for price escalation in years 2 and 3 of the contract?*

There is currently no percentage built into the contract. This will be worked out with the individual providers.

32.) *What are the caterer's obligations in regard to the Memorandum of Understanding in Exhibit L?*

FEMA/SEMA only reimburse the City for expenses that are part of contracted services. The Memorandum of Understanding in Exhibit L establishes emergency services as contracted catering services in order to allow for FEMA/SEMA reimbursement. In case of an emergency, the specifics of the caterer's obligations will be worked out and agreed upon between SLAAA and the contractor.

33.) *What parts of the RFP need to be notarized?*

Notarizing is only required where there are specific instructions. "Witness signature" does not require a notary.

34.) *What are congregate non-center meals?*

Congregate non-center meals refer to instances when SLAAA is contacted for a program by an organization, such as a church, and a meal service is requested. These meals will be served in disposable containers and are compensated as congregate meals. These services are requested infrequently and within the service area, with the exception of events like the Village of Many Colors in St. Louis County.

35.) *Will you provide a sample organizational chart?*

No, each bidder must submit their own. The organizational chart should show the organizational structure and hierarchy.

36.) *Can Caterers visit the senior centers before being awarded a contract?*

Yes. Bidders are encouraged to visit the senior centers to understand their desires regarding services and their facility capacities, many sites do not have storage or heating capability. Contact information has been provided to all interested caterers.

37.) *How do we find out about the vendors that are already MWDBE certified within the City of St. Louis?*

Please go to the following website: http://www.mwdbe.org/directorys, you will find an easy to use directory to help in your search.

38.) *Do we need to submit attachments that aren't specifically applicable to our organization?*

Contact David Sykora if you have a concern about a specific attachment. However, for attachments like the Business License or the Living Wage Requirement, a signature is still required whether or not those specifications are applicable to your organization.

39.) *When submitting a budget, do we submit a number we would like to spend?*

These programs generally do not expand exponentially, so funding usually stays the same from year to year. SLAAA can always negotiate fewer units or a lower price. However, once a contract agreement is reached, the prices cannot be increased.

40.) *Can you break down service units into different categories?*

SLAAA cannot use units or funding allocated for one area into another service category. Bidders do not need to specify the funding sources, they just need to submit bid sheets for each service category they seek to provide.

41.) *If my organization is applying to provide services in multiple categories, do we submit one RFP for all services or a separate RFP for each service category?*

You should submit one complete RFP that includes bid sheets for each service category.

42.) *What are senior center innovative programs?*

Innovative programs refer to services that have not been provided before and could be funded in the future. These programs must be able to fit into a pre-existing service category.

43.) *What are Supplemental Services?*

SERVICE DEFINITION:
The provision of meats, produce, canned goods, perishables, and other commodities (ex. incontinence supplies) to supplement the nutritional intake and/or personal care of seniors.

44.) *Do we have to submit a scope of work for the Medicaid reassessment and Navigator programs?*

No, the scope of work is dictated by SLAAA. Bidders need to express their interest and capacity to provide these services.

45.) *When submitting case management bids, how should we demonstrate proof of years of experience and supervised hours?*

Bidders can submit staff resumes that describe the length and nature of their relevant work experience and training.

46.) *What is the Healthy Ideas program?*

Healthy Ideas is an evidence-based program for seniors who have tested high on the geriatric depression scale. This service is not currently offered, however there is interest and funding for it. A social worker/case manager would screen a client and initiate Healthy Ideas programming and case management. Case management service providers can bid for Healthy Ideas and would need to be contracted specifically for Healthy Ideas in order for the service to be funded.

For the Healthy Ideas program, do we need to submit step-by-step descriptions of tasks and events like we would for case management?

No. If the bid is accepted, special Healthy Ideas training will be provided for case management staff. If you would be using the same staff as your case management staff, please note that in the bid.

47.) *What goes into the exhibits?*

The exhibits in the RFP are provided by SLAAA as documentation of requirements. Not every exhibit corresponds directly to the attachment with the same designated letters. Bidders must submit attachments in order to meet the requirements of the RFP. Please refer to the Attachments Table of Contents in the RFP to see what documentation is required in each attachment.

48.) *Do current providers need to re-submit documentation like 990s?*

Yes, all bidders must submit all of the required information, whether or not they have previously submitted it to SLAAA.

49.) *Can we include all proof of insurance on one sheet?*

Yes. The Cover sheet from the Insurance company is sufficient provided that it indicates the type coverage and amount for each required policy.

50.) *What part of the 990 must be submitted in the proposal?*

The cover page of the 990 is adequate, as long as it includes all signatures and documentation that the 990 has been accepted.

51.) *Is there a description in the catering RFP of the meals, components, etc?*

Yes. Anyone can access the catering RFP and see what information and requirements the caterers have. Much of the information and requirements for frozen meals come from other agencies that provide frozen meals.

52.) *Can you define a "fresh chilled meal?"*

A fresh chilled meal refers to meals that come delivered to a home made fresh in vacuum-sealed packages, packed in dry ice. As long as these meals are kept chilled, the vacuum seal will keep it fresh. This is something for meal providers to take into consideration when speaking with caterers.

53.) *Will you contract one caterer for all catering services or multiple caterers?*

We could potentially award multiple contracts or one contract.

54.) *If the caterer provides frozen meals, how will they provide milk?*

Caterers could provide several meals at a time with a quart or half-gallon of milk. It is up to caterers to suggest different alternatives.

55.) *What is the policy if a Senior Center bids on more than one area, or if a BIDDER bids on a service but is not awarded a contract for that services?*

In both cases, the fact that an administratively correct bid was made but was not accepted, the bid will be kept on record and that center or bidder will get first right of refusal if we have to find another provider of service.

General notes

- **The City of St. Louis population, including seniors, has declined in recent years. 2010 Census data shows that there are 49,919 persons over the age of 60 in the City of St. Louis. This is a loss of 9,535 persons over the decade. SLAAA has been very restrictive on who may receive a home delivered meal due to funding limitations.**
- **The trend nationally is that the congregate meal usage is declining.**
- **Menus follow DRI per State Requirements SLAAA Dietitian prepares the menu with the approval of the catering staff.**
- **Billing – Catering Invoices are sent to the senior center by the 2nd working day after month in which meals have been delivered to be verified and then the senior center will send it to SLAAA. Payment to caterer will be processed per our policy. The contractor can expect payment anywhere between 7 and 27 days after submission of the invoice.**
- **Emergency or Disaster Meals – the Memorandum of Agreement allows for the purchase of equipment and supplies if the City has declared a disaster or emergency. The items listed (spoons, pans, towels, pots & pans, etc.) are examples of such supplies. These are separate costs that will be negotiated at signing.**

Please submit additional questions in writing at any time prior to bid submission.

END

" Revised "

EXHIBIT W
SERVICE AREAS FOR BID

(INDICATE AREAS TO BE SERVED ON YOUR BID SHEET)
(SPECIFICALLY REQUIRED FOR HOME DELIVERED MEALS)

AREA	BOUNDARY	DESCRIPTION
North HDM Service Areas		
1	East	Mississippi River between East Carrie Ave & City Limits on North
(Fr. Tolten)	South	East Carrie Ave from Mississippi River to Interstate 70: Interstate 70 to City Limits on West
	West / North	City Limits on west between Interstate 70 and Mississippi River
2	North	East Carrie Ave from Mississippi River to Interstate 70: Interstate 70 to City Limits on West
(Wesley House)	East	Mississippi River between East Carrie Ave & Dock St.; Fair Ave between Natural Bridge Ave & Ashland Ave. Marcus Ave between Ashland Ave & Cote Brilliante Ave
	South	Dock St from Mississippi River to Natuarl Bridge Ave to Fair Ave.; Ashland Ave between Fair Ave & Marcus Ave.; Cote Brilliante Ave between Marcus Ave & City Limits on West
	West	City Limits between Interstate 70 & Cote Brilliante Ave
3	North	Dock St from Mississippi River to Natural Bridge Ave to Fair Ave.; Ashland Ave between Fair Ave & Marcus Ave.;
(Northside)	East	Mississippi River between Dock St.& Washington Ave;
	South	Washington Avenue between Mississippi River & N.Grand Blvd; Forest Park Blvd. between N. Grand Blvd & N. Newstead Ave.; Martin Luther King Dr between N. Newstead Ave and Marcus Ave.
	West	Fair Ave between Natural Bridge Ave & Ashland Ave. Marcus Ave between Ashland Ave & Martin Luther King Dr. N.Newstead Ave between Martin Luther King Dr. & Forest Park Blvd
4	North	Cote Brilliante Ave between Marcus Ave & City Limits on West.; Martin Luther King Dr between N. Newstead Ave and Marcus Ave.
(Robert Fulton))	East	N.Newstead Ave between Martin Luther King Dr. & Forest Park Blvd.; N. Kingshighway Blvd between Martin Luther King Dr & Cote Brilliante Ave
	South	Lindell Blvd between City Limits & N. Kingshighway Blvd; Forest Park Pkwy between N. Kingshighway Blvd & N. Newstead Ave;
	West	City Limits on West between Lindell Blvd & Cote Brilliante Ave

" Revised "

EXHIBIT W
SERVICE AREAS FOR BID

(INDICATE AREAS TO BE SERVED ON YOUR BID SHEET)
(SPECIFICALLY REQUIRED FOR HOME DELIVERED MEALS)

AREA	BOUNDARY	DESCRIPTION
South HDM Service Areas		
5	North	Washington Avenue between Mississippi River & N.Grand Blvd; Forest Park Blvd. between N. Grand Blvd & N. Kingshighway Blvd.
(Five Star)	East	Mississippi River between Osceola St. & Washington Ave
	South	Osceola St. between Mississippi River & Compton Ave; Meramec St between Compton Ave & S. Grand Blvd; Arsenal St. between S. Grand Blvd & S. Kingshigway Blvd.
	West	Compton Ave between Osceola St. & Meramec St.; S.Grand Blvd between Meramec St & Arsenal St. S. Kingshighway Blvd between Arsenal St. & Forest Park Blvd.
6	North	Arsenal between Grand and Kingshighway; Oakland between Kingshighway and City Limits
(St. L Activity Ctr)	East	S. Grand between Gravois and Arsenal; Gustine between Gravois and Oleatha; S. Kingshighway between Lindenwood and Oleatha
	South	Gravois between S. Grand and Gustine; Oleatha between Gustine and South Kingshighway; Lindenwood between South Kingshighway and City Limits on the West
	West	City Limits on the West between Lindenwood and Brookings Drive
7	North	Osceola between Mississippi River and Grand; Gravois between S. Grand and Gustine; Oleatha between Gustine and S. Kingshighway; Lindenwood between S. Kingshighway and City Limits
(City Seniors, Inc.)	East	City Limits between Mississippi River and Osceola; City Limits between Grand and City Limits on the West
	South	Mississippi River between Osceola and the City Limits on South Grand between Osceola and Gravois; Gustine between Gravois and Oleatha; South Kingshighway between Oleatha and Lindenwood.
	West	City Limits on the West between City Limits on the South and Lindenwood