

REQUEST FOR PROPOSAL

- DATE:** August 11th, 2016
- RE:** Development of a specialized service to provide direct assistance to individuals who have received written notice from Social Security that they are at risk of being determined 'not disabled' and losing cash benefits due to wages and/or a medical review.
- TO:** All interested parties
- SUMMARY:** Primary goal is to develop a Vendored service to provide technical services, advocacy, support, training, and assistance to identified representative payee as needed to respond to Social Security notice of action. Applicants will be responsible to gather documentation, respond to written inquiries, prepare necessary materials, and submit materials/response in a timely manner as directed by Social Security. Applicants must have a history of interacting directly with Social Security, a detailed understanding of Social Security regulations, and effective communication skills with both Social Security Administration staff and the identified representative payee.

Access California Code of Regulations (CCR), Title 17 via www.dds.ca.gov

The Regional Center of Orange County (RCOC) appreciates your interest in responding to the Request for Proposal (RFP) # **TECHSERVICESOCIALSECURITYFY1617**. We are including specifics regarding this proposal in order to help you in the application process. Please read all material and follow the guidelines presented within this document. Thank you in advance for your effort in helping serve persons with disabilities, along side of the Regional Center of Orange County.

CONSUMER PROFILES/TARGETED POPULATION

Applicants responding to this RFP must expect to review and accept the following consumer profiles: Individuals with Intellectual Disabilities may have a diagnosis between borderline to severe/profound intellectual disability; cerebral palsy; seizures; autism; mental health diagnoses; individuals may be their own rep payee or an assigned rep payee; individuals may reside at home with families, in their own homes, or in residential living options. Potential applicants must be willing and able to meet with potential referrals within their preferred location within the community. Individuals will be receiving social security benefits and are at risk of losing them, or benefits may be in suspension.

ELIGIBLE APPLICANTS

Applicants must:

- Possess documented experience interacting with Social Security in resolving difficult and complex issues.
- Have a proven history demonstrating the ability to deal with consumers who present challenges within the community
- Have received satisfactory reviews for the last two (2) years of operation
- Have received no substantial citations resulting in a Corrective Action Plan (CAP) from RCOC or within the last two (2) years of operation if applicable
- Demonstrate ongoing knowledge of services to be delivered to the community

All other participants are subject to approval by RCOC, pursuant to Title 17 Regulations. Eligibility of respondents will also be contingent upon evaluations and any citations received within the last two years from a regional center or licensing based on nature and severity of the violation.

RATE OF REIMBURSEMENT

The rate of reimbursement is set by RCOC and agreed upon by vendor. The applicable service code under which this service will be reimbursed is through Service Code 100 Professional, Copying, Reporting, and Technical Services. Vendor will be paid based upon direct services to consumers per the established rate. The rate will be determined by RCOC based upon comparable programs within the community and not exceed a rate of \$35.83 per hour. Referrals for service may only come through RCOC specialist when applicable situations arise. A Service Contract with a maximum support level will be provided with referral information.

APPLICATION PROCESS

- Step 1: RFP applications submitted to the Regional Center of Orange County (RCOC) no later than **4 pm on Friday September 16th, 2016.**
- Step 2: Applications will first be screened for acceptability based upon RFP requirements. It is anticipated that this process will take place within one (1) week following the application due date.
- Step 3: Applications accepted will be reviewed by an RFP Review Team responsible for determining the applicant's qualifications. This step is anticipated to take between one to two weeks.
- Step 4: Upon review of all applications, selected applicants and those not selected will be notified in writing.

- Step 5: Applicant(s) that have been selected for further consideration may be asked to attend an interview with RCOC staff. Following the applicant interview, the applicant(s) will be notified in writing of the award notice.
- Step 6: If awarded the proposal, the vendor will be required to submit a full program/service design and vendor application. RCOC will collaborate with the vendor to achieve an acceptable program to best meet the needs of the consumers.
- Step 7: Following submittal of the vendor application and approval of program design, a vendor number will be assigned through the Department of Developmental Services if applicable.

APPLICATION AND CONTENT REQUIREMENTS

Each proposal must include the following statements in the order listed below. Evaluation of the information submitted will be on the basis of a pre-determined Evaluation format.

• Agency/Individual experience and background:
• Brief program design statement:
• Attachments:

All applications must follow the attached formatting requirements.

Proposals shall not exceed fifteen (10) pages in length (cover page, table of contents, letter of reference(s), and index should be separate from the 10 pages).

1. Face Sheet (Must serve as the Face Sheet of Proposal):

Name, address, and telephone number of the applicant. If the applicant is a corporation, list the principle members of the corporation and include verification of incorporation in California. Vendor number(s), vendoring regional center(s), and facility license numbers if applicable. Name the author(s) of the proposal. List any parties who participated in writing all or part of the proposal. Any proposal written by a consultant or grant writer must demonstrate a commitment by the writer to provide ongoing technical assistance during the implementation stage, which should be reflected in the budget.

2. Proposal Section 1

Agency/Individual Experience and Background Information must be presented in the following manner:

- A. Qualifications of the agency. Provide information about current experience in each of the following areas: collaborative efforts, history of navigating legal issues related to consumer advocacy, history of working with Social Security, and a history of working through difficult and complex Social Security issues.

- B. Qualifications of leadership staff which details education, knowledge and experience providing services to persons with developmental disabilities. Describe how the documented experience, education and knowledge are seen as a good fit for developing this program.

3. Proposal Section II

Brief program design presentation in the following manner:

- A. Identification of the organizations' philosophy regarding services to persons with disabilities.
- B. Sample documentation that would be used for Social Security issues, including forms that may be required, regulations supporting their position, sample letters, etc.
- C. General description of the services to be provided to consumers.
- D. Anticipated service outcomes for each individual served.

NOTE: The summary program plan may serve as the basis for the complete program design.

Please do not submit a completed program design.

1. Attachments

Attachment #1: References and/or letters of recommendation

The proposal must include at least two (2) letters of reference with addresses and telephone numbers. Applicants should be aware that the selection committee might contact references.

Attachment #2: Organizational Structure

An organizational chart for the project must be included (full names), and identification of the governing or advisory board, administrative and supervisory hierarchy, etc. Identification of the private or corporate ownership must be identified on an attached page. If the company is under corporate ownership, the owners and/or board of directors must also be identified by name, address, and telephone number.

Attachment #3 Consultants & Qualifications

If the applicant agency is anticipating engaging consultants, such consultants, their name address and telephone number must be identified. The qualifications/credentials must be identified with each consultant's function(s), role, and/or purpose articulated in the brief program design. The proposal must include information regarding the instructional strategies that will be used when working with individual consumers referred based upon the referral information.

Attachment #4: Financial Statement

Applicants must demonstrate fiscal responsibility by submitting a current verified financial statement that details all current and fixed assets, and current and long-term liabilities.

FORMATTING REQUIREMENTS:

Proposals will be disqualified from consideration for failure to: follow instructions, complete documents, submit required documents, or meet the deadline. **No Exceptions will be made.**

- Standard size (8 ½ x 11) white paper
- Typed, using a standard font (12), single-spaced pages with one (1) inch margins
- Table of Contents indicating each of the Sections and Attachments to be evaluated
- Each page must be numbered in consecutive order for each Section and Attachments
- Clearly label each Section
- Clearly label each Attachment
- Do NOT place in ring binders or folders; but, rather use binder clips or compressor clips

A complete RFP response must contain the following:

Face Sheet

Proposal

- Section I
- Section II

Attachments:

- #1 References and/or Letters of Recommendation
- #2 Organizational Structure
- #3 Consultants and Qualifications
- #4 Financial Statement

ADDITIONAL PROVISIONS:

- **RCOC reserves the right to retract the RFP at any time throughout the application process. In addition, RCOC reserves the right not to select an applicant for program implementation if, in its opinion, no qualified applicants have responded; or, if the respondent's program proposals do not meet a minimum evaluation score.**
- **Individuals presenting proposals in response to this request MUST submit an ORIGINAL and ONE (1) copy of all required information to RCOC.**
- **Completed proposals for this RFP are due Friday September 16th, 2016. Proposals received after 4 pm on the due date will be returned unopened.** Proposals may be sent U.S. mail to the following address:

Jack Stanton, Manager, Consumer and Community Resources
Regional Center of Orange County
P.O. Box 22010
Santa Ana, CA 92702-2010

The proposal may also be **hand delivered** to the following address:

Jack Stanton, Manager, Consumer and Community Resources
Regional Center of Orange County
1525 N. Tustin Ave
Santa Ana, CA 92705

- **Proposals will be stamped with the date and time of receipt.**

FACE SHEET (Must be used as the cover page for the proposal)

RFP#: <u>TECHSERVICESOCIALSECURITYFY1617</u>	RFP Due Date: <u>4:00 pm, Friday, September 16th, 2016</u>
Applicant (Agency) Name (If the applicant is a corporation, list the principle members of the corporation.)	
Contact Person:	
Contact Phone Number:	
Mailing Address:	
Site Address	
List name of consultant and/or individuals involved in writing the program design: Any proposal written by a consultant or grant writer must demonstrate a commitment by the writer to provide ongoing technical assistance during the implementation stage, which should be reflected in the budget.	
If you are currently a vendor, list any and all vendor number(s) and the vendoring regional center:	
Vendor number: Regional Center	Vendor Number: Regional Center:
Vendor number: Regional Center	Vendor Number: Regional Center: