



ADDENDUM 1

Request for Proposals (RFP) No. 2017-SSA-WBA-BHCS-SSISSDIAS

For

Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Advocacy Services for Alameda County Social Services Agency (SSA) and Alameda County Behavioral Health Care Services (BHCS) Clients

RFP No. 2017-SSA-WBA-BHCS-SSISSDIAS

Questions and Answers

1. What total funding is available for this RFP?

A: No funding level is being disclosed for this RFP; however, the information found in Item No. 15, RFP page 6, may be helpful in establishing a budget for a proposal.

2. What is the anticipated budget for the consultative examinations?

A: No dollar amount is being provided for consultative examinations; however, it is anticipated that approximately 15 percent of the projected annual caseloads for SSA and BHCS (see Item No. 15, RFP page 6) may require such examinations.

3. It appears that outreach and engagement are outside of the scope of services? Is it anticipated that this will be done in coordination with a separate case management provider?

A: Outreach and engagement are outside the scope of services for this RFP. Referrals will originate from SSA for its contracts. For BHCS contracts, referrals may come from BHCS and from its network of providers including separate case management programs.

4. This RFP is focused on serving SSA-BHCS referrals, is there any anticipated funding for outreach to people on the streets who are not accessing any services? (i.e. not in the system)?

A: There is no anticipated funding for outreach as part of this RFP. However, contractors will be allowed to serve walk-ins with 10% of their total contract capacity.

5. As long as prime bidder and subcontractors meet bidder qualifications, can prime and subcontractors design their own division of tasks?

A: Yes. Bidders should make the division of labor and costs explicit in their proposals. Proposals will be scored according to the process described in the proposal.

6. Can references include a County employee?

A: Yes. However, please be aware that the County employees' roles may govern their response. This may result in a less complete response than another reference might give.

7. Do staff need to be individually designated under the ACSSA or BHCS budget or can there be flexibility to work under either/both?

A: A staff person could work partially under both contracts. However, costs can't be duplicated across contracts. For bidders submitting proposals for the SSA and BHCS, that means the combined percentage of time allotted, per staff person, for both proposals, cannot exceed one Full-Time Equivalent (FTE). It is expected that staffing and their correlating FTE will be clearly identified in the budget narrative.

8. I assume it is ok for a contractor to bid for a % of the anticipated caseload. Is that right?

A: Yes.

(Over, please)

RFP No. 2017-SSA-WBA-BHCS-SSISSDIAS
Questions and Answers—Page 2

9. 1 or 2 contractors total or 1-2 contractors per agency?

A: 1-2 contractors per Agency. SSA and BHCS are both looking to procure 1-2 contractors each.

10. To confirm, the “Other” line on the budget form can include multiple categories?

A: Yes. Please detail the categories in your budget narrative.

11. Can “Other” include administrative overhead? If so, what percentage?

A: Yes. Per the Federal Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Supercircular), administrative overhead of up to 10 percent is acceptable.

12. The address on page 25 has a different attention from address on page 1 of attachment 3.

A: Tim Roberts is the lead Contracts Office staff person for this RFP so please direct proposals to his attention. Annette Brisco is a secondary contact who will be available to accept proposals on May 5, 2017 if Mr. Roberts is out of the office.

13. Under specific requirements, Section E(4)(f) on page 7, is this for January 2012-December 2016? Can the results be broken down by fiscal year or calendar year?

A: No. The time period is January 1, 2012 to December 31, 2016. Bidders must provide the data/results by calendar year (e.g., January 1, 2012 – December 31, 2012; January 1, 2013 – December 31, 2013; January 1, 2014 – December 31, 2014, etc.). Evaluators will be reviewing this section as part of their scoring.

14. Will BHCS be available to provide technical assistance to the users of the database?

A: Yes, for the winning bidder(s).

15. Is there a set budget amount set aside for this scope of work and if so, can the County provide us with that budget amount?

A: Please see the response to question No. 1 above.

16. Are there incumbent vendors providing these services and if so, can the County provide their names and for which populations they serve?

A: Yes, Bay Area Legal Aid and Alameda County Homeless Action Center. Both organizations have contracts to serve both SSA clients and BHCS clients.

17. If this is a rebid of an existing contract, can the County provide the number of initial applications filed in the last year by incumbent vendor(s) for each - SSA and BHCS clients? Same question for number of reconsiderations, number of hearings, number AC appeals and number of Federal Court cases filed?

(Over, please)

RFP No. 2017-SSA-WBA-BHCS-SSISSDIAS

Questions and Answers—Page 3

A: The following are the numbers of clients that were represented at each level in calendar year 2016. 1) Initial= 986 clients; 2) Reconsideration: 617 clients; 3) ALJ Hearing= 1,192 clients; 4) Appeals Council = 116 clients; 5) District Court= 32 Clients.

18. If this is a rebid of an existing contract, can the County provide the number of allowances at each adjudication level achieved by incumbent vendors?

A: The following are the approvals by adjudication level for 2016: 1. Initial = 175 Approvals; 2. Reconsideration = 83 Approvals; 3. ALJ =237 Approvals; 4. Appeals Council = 3 Approvals; 5. District Court = 1 Approval.

19. Related to the request to supply the maximum number of clients a bidder can serve, if a bidder has the capacity to serve all potential referrals for both SSA and BHCS, will the county consider contracting with only one vendor for both populations and scope of services?

A: Yes, and each department would have its own separate contract.

20. Because it states on page 2 of Attachment 3 - "BIDDERS SHALL NOT SUBMIT TO THE COUNTY A RE-TYPED, WORD-PROCESSED, OR OTHERWISE RECREATED VERSION OF ATTACHMENT NO. 3— BID RESPONSE PACKET—OR ANY OTHER COUNTY-PROVIDED DOCUMENT" can the County clarify where it would like vendors to place their responses to each of the sections in the Proposal Narrative? Should they be included after page 13 of Attachment 3 as Appendices labeled by section (i.e. Appendix A - Agency Background, Appendix B - Fiscal Management, etc...)?

A: Bidders may submit responses to each of the RFP Response Packet Proposal Narrative sections, after page 13 of Attachment 3, as Appendices labeled by section in the order listed in Attachment 3.

21. Can the County confirm that it is acceptable to replicate pages 12 and 13 of the budget form if a vendor wishes to submit a proposal for both the SSA and the BHCS scopes of work?

A: Yes, you may replicate pages 12 and 13 of the budget form to apply for both populations.

22. "If Contractor(s) determines that client referred is not SSI/SSP, SSDI or CAPI eligible Contractor(s) shall immediately close the referral in the SSI Advocacy Database." Can the County clarify - is the SSI Advocacy Database one currently in place and provided by the County or is this a database to be supplied by the bidder? If it is a county created database, can the County provide us information regarding the program used to operate the database?

A: The SSI Advocacy Database is currently in place. Contractors will have to install Citrix to access the database within the County firewall.

23. Can the county provide bidder's with a copy of the "Community Outreach Questionnaire" referenced in this section of the RFP?

A: See amended language (below) in the Addendum Section titled "REVISIONS, RFP, SECTION II, STATEMENT OF WORK (Page 5)".

(Over, please)

RFP No. 2017-SSA-WBA-BHCS-SSISSDIAS
Questions and Answers—Page 4

24. Can the County confirm that this form (Exhibit E – Example – Annual Quality Assurance Report) is just an example and not required to be submitted as part of a bidder's response to this RFP?

A: This is just an example and is not required to be included in bidder's response to the RFP.

25. (Scope of Work-Sections) B5 and B6 require the contractor to file timely requests for ALJ review and timely civil suits in Federal District Court. There are times when appealing is not advantageous to the client. Filing a new claim would be faster and more likely to succeed. Does the contractor have the discretion to file a new claim as an alternative to appealing?

A: Yes.

26. (Scope of Work-Section) B7 requires contractor to provide Attorney representation at hearings at all levels. "The purpose of the RFP is to obtain the services of qualified attorneys/advocates." May contractor provide an advocate instead of an attorney at hearings where advocates are allowed?

A: Yes, however, the advocate must be operating under the supervision of an attorney.

27. (Scope of Work-Section) B13 requires the contractor to pay for consultative examinations to support disability claims. Does this mean that county General Assistance evaluations will no longer be available to clients served by this contract?

A: Yes. Contractors will be required to arrange, schedule and pay for these examinations as part of their contracts.

28. **(Bidder Qualifications-Section)** D3 states that "bidders must be able to provide services Monday through Friday continuously between the hours of 9 a.m. and 5 p.m." May the contractor close the office one hour for lunch? May the office be closed for staff meetings and paperwork quiet times as long as at least 25 drop-in hours are offered each week?

A: Yes, as long as the contractor's hours are stated in the contract, posted in the office where clients can easily see them, verbally explained to clients and the contractor is able to adequately accommodate its referrals/caseload.

29. **(Deliverables/Reports)** Performance measure 3, asks for the number of clients referred that successfully receives SSI/SSP or SSDI. Does this measure also include the number of referred clients who successfully receives CAPI?

A: Yes.

30. Will referrals from BHCS designees include referrals from all BHCS (designees) who have been referring clients to existing contractors?

A: Yes.

(Over, please)

RFP No. 2017-SSA-WBA-BHCS-SSISSDIAS
Questions and Answers—Page 5

31. Is there a list of acceptable ACSSA and BHCS designees who will be able to make referrals?

A: No such list is currently available.

32. Scope of Work (RFP, Sec. B) citing: "...contractors will additionally be required to conduct in-reach at Santa Rita Jail for BHCS pre-release SSI Advocacy program." Is this process meant (for) individuals in Santa Rita Jail in need of reinstatements and ongoing outreach/case management upon release? Could the prime contractor subcontract those services?

A: No. The scope of work of this RFP does not include reinstatements and ongoing outreach/case management upon release.

33. Does the scope of work for "in-reach at Santa Rita Jail for BHCS' pre-release SSI Advocacy Program" include only pre-release applications, representation and advocacy, or also post-release reinstatement for those who were incarcerated for less than one year?

A: Please see the response to question No. 32.

REVISIONS

RFP, SECTION II, STATEMENT OF WORK (Page 5)

B. SCOPE OF WORK

2. Meet with clients several more times after the initial session to prepare all supporting paperwork including the Function Report. ~~or Community Outreach Questionnaire.~~

Note: The “Community Outreach Questionnaire” is no longer being used so it has been deleted from the above sentence in the RFP.

HANDOUT...HANDOUT...HANDOUT



Performance Measures : Results Based Accountability


What is Results Based Accountability (RBA)?

- A way of thinking and taking action to improve communities
- Used to improve the performance of programs
- SSA is using this framework to develop performance measures for contracts

**Key
benefits
of
RBA**

**SIMPLE
COMMON SENSE
PLAIN LANGUAGE
USEFUL**

Two Kinds of Accountability



Population
Accountability

Performance
Accountability

Population Accountability
about the well-being of
WHOLE POPULATIONS


For Communities – Cities –
Counties – States – Nations

Performance Accountability
about the well-being of
CLIENT POPULATIONS

For Programs – Agencies –
and Service Systems

Performance (Program) Accountability

PERFORMANCE MEASURE



Performance
Accountability

A measure of how well a program, agency or service system is working.

Three types:

1.How much did we do?

2.How well did we do it?

3.Is anyone better off? = **Client or
Program
Outcome**

Program Performance Measures

	Quantity	Quality
Effort	<p>How much did we do?</p> <p># Clients/customers served</p> <p># Activities (by type of activity)</p>	<p>How well did we do it?</p> <p>% Common measures client staff ratio, % staff fully trained, % client satisfaction, unit cost</p> <p>% Activity-specific measures</p>
Effect	<p>Is anyone better off?</p> <p># / % Skills / Knowledge (e.g. parenting skills)</p> <p># / % Attitude / Opinion (e.g. toward drugs)</p> <p># / % Behavior (e.g. school attendance)</p> <p># / % Circumstance (e.g. working, in stable housing)</p>	

How much did
we do?

Performance Measure 1:

How many clients were represented at each stage?

Deliverable:

Contractor will enter and update client data into a data system identified by SSA and BHCS. Data system will require reporting on filing date, decision date, and result for initial application, reconsideration, administrative hearing, appeals council, and federal court.

How well did we do It?

Performance Measure 2:

The number and percentage of cases closed without obtaining benefits for the following reasons: lost contact, administrative closure, insufficient merit to proceed, change in eligibility status, and client withdrawal.

Deliverable:

Contractor will enter and update client data into a data system identified by SSA and BHCS. The data system will require reporting on the date of closure and reason for closure from an identified list of reasons.

**Is anyone
better off?**

Performance Measure 3:

Number of clients referred that successfully receives SSI/SSP or SSDI.

Deliverable:

Contractor will enter and update client outcome data into a data system identified by SSA and BHCS. The data system will require reporting on any approval at any level of the application process.

Data Collection & Reporting

- Describe your data collection plan

Data will be entered in real time or updated nightly in the SSI Advocacy Database

- Describe your quality assurance plan

Contractor will submit an annual QA Report.

Data Collection & Reporting

Quality Assurance Report

- ❖ Describe the data collection process your agency developed to track RBA Performance Measures (include all database systems used for this program, the process for entering data in the database, the staff responsible for this collection process and how you gather individual client data and aggregate this into your SSA report).
- ❖ Describe the quality assurance methods used to ensure data quality and accuracy (frequency of internal data audits, process for internal audits, and staff person assigned to conduct internal audits).
- ❖ Describe the limitations or challenges that the program experienced in the data collection process and/or ensuring data quality.
- ❖ What strategies are you implementing to address these challenges and/or limitations?

Thank You

FY 2017-2018
RFP for SSI/SSDI Advocacy Services for SSA & BHCS Clients
Bidders' Conference #1
Sign-In Sheet
April 17, 2017

PLEASE PRINT LEGIBLY

	NAME	ORGANIZATION	PHONE #	E-MAIL (Please print legibly)
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5	Steve Weiss	Bay Area Legal Aid	(510) 663-4744 x 5206	sweiss@baylegal.org
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FY 2017-2018
RFP for SSI/SSDI Advocacy Services for SSA & BHCS Clients
Bidders' Conference #2
Sign-In Sheet
April 18, 2017

PLEASE PRINT LEGIBLY

	NAME	ORGANIZATION	PHONE #	E-MAIL (Please print legibly)
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