

NOTICE

REQUEST FOR QUALIFICATIONS

For Older Americans Act Focal Point Services

Fiscal Years  
2024-2027

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Responses must be received at Clackamas County Social Services Division  
no later than 4:00 pm, March 16, 2023.

## SECTION I

### **A. General Information**

Notice is hereby given that Clackamas County, by and through the Health, Housing and Human Services Department (H3S), Social Services Division is conducting a Request for Qualification (RFQ) process for the delivery of Older Adult Community services (nutrition, transportation, social services, legal and other services) for communities throughout Clackamas County.

As the designated Area Agency on Aging, Clackamas County Social Services has the responsibility to plan, develop, support, and coordinate services for a comprehensive service delivery system for citizens age 60 and older, and for people with disabilities. Social Services receives federal Older Americans Act (OAA) funds and state funds to help support this system. Services are partially delivered through service providers in the county.

Federal Older Americans Act and other funds supporting these services include:

- Title IIIB (Federal Assistance #93.044) – Community-Based Supportive Services
- Title IIIC (Federal Assistance #93.045) – Nutrition Services
- Title IIID (Federal Assistance #93.043) – Evidence-based Health Promotion Services
- Title IIIE (Federal Assistance #93.052) – Family Caregiver Support Services
- Other State and Federal Transportation funds including Ride Connection and State Transportation Funds as well as federal vehicle maintenance funds (Federal Assistance #20.513).

1. Service areas within Clackamas County include: Canby, Estacada, Gladstone, Happy Valley, Hoodland/Welches, Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, West Linn, and Wilsonville.
2. OAA Subrecipients provide a mix of the following services. Refer to “Current Funding Levels” for the detailed set of services provided in specific service areas. Respondents should be prepared to provide at least the current array of services in a location, if not more.
  - Focal Point –Client Assessment, Information and Assistance, limited Case Management, Outreach, Reassurance, Health Promotion and Transportation;
  - Nutrition Services - Meal Preparation, Food Service and/or Meal Site Management;
  - Family Caregiver Day Respite Services
3. A subrecipient agreement will be awarded to one grantee to provide county-wide services of Guardianship/Conservatorship and Guardianship Diversion. See “Service Definitions” for more information.
4. A subrecipient agreement will be awarded to grantee(s) to provide legal services throughout Clackamas County to the most vulnerable seniors, age 60 and over, to protect their health welfare, independence and security. These services will be provided where other legal services are not available, targeting those in greatest social and economic need, minority, institutionalized, isolated, rural and/or homebound.
5. Older Americans Act funding is supportive funding; the expectation is that subrecipients have the means to meet local match requirements (11.13% for nutrition programming and client services and 25% for respite services) and cover the majority of program costs. Current

awards cover less than 50% of the total cost of program delivery. Subrecipient service providers must develop and acquire other resources, as appropriate, to supplement awarded funds. OAA funded services are not provided to clients through means-testing. OAA-funded service providers must allow, and may solicit, voluntary contributions from clients for all services under the Act, as long as the method of solicitation is non-coercive. Other services that may be provided which require a fee from clients are not eligible under the OAA guidelines.

This preliminary Request for Qualifications (RFQ) will identify providers qualified to provide services. If competition exists in any geographic area, qualified providers will participate in a subsequent process. Subrecipient agreements will be awarded for fiscal years 2024 - 2027 (July 1, 2023 - June 30, 2027).

The population served by subrecipients will primarily be 60 years of age or older.

Services must adhere to all applicable Federal and State laws, rules and regulations, as well as related County requirements.

## **B. Service Definitions**

Older American Act Focal Point service providers are designated multipurpose senior centers established to encourage the maximum co-location and coordination of services for older individuals. The typical Focal Point offers meals three to five times a week, information and assistance, community outreach, client assessment, transportation, social services, and health promotion activities. Focal Points operate five days a week for a minimum of 32 hours per week. Focal Points combine people, services, and activities.

The following are OAA reimbursable services for responding Providers:

**Public Outreach/Education:** A service or activity providing information to groups of current or potential clients and/or aging network partners and other community partners regarding available services for the elderly. A Unit of service is one documented contact; match required.

**Reassurance:** Regular friendly telephone calls and/or visits to physically, geographically or socially isolated registered clients receiving services to determine client safety and wellness, if the client requires assistance, and to provide reassurance. A unit is one contact; match required.

**Case Management:** An in-depth interview with a client to provide access to an array of service options to assure appropriate levels of service and to maximize coordination within the service delivery system. Case management must include four general components: *access*, *assessment*, *service implementation*, and *monitoring*. A Unit of service is one hour; match required.

**Information and Assistance:** The provision of current information to clients on opportunities and services available within the inquirer's communities. It includes assessment of the problems and capacities of the client, links clients to opportunities and services, and, to the maximum

extent feasible, ensures the client receives the services needed and is aware of the opportunities available by establishing adequate follow-up procedures. A Unit of service is one contact; match required.

**Transportation:** Scheduling and/or providing rides for older persons who are unable to manage transportation independently. A unit is a single one-way ride.

**OAA HDM Assessment:** An in-depth interview with a client as a means of determining a homebound older person's eligibility for home-delivered meals per the Oregon Nutrition Service Program standards; match required.

**Meal Site Management:** Meal Site Management includes such tasks as: supervising final on-site preparation and serving/delivery of meals to eligible congregate and home-delivered participants; recruiting, training, scheduling and monitoring program volunteers; determining eligibility of participants; collecting and accounting for participant donations; completing and submitting required budget and program reports; providing events and activities for congregate meal participants; and publicizing meal program in the community to enhance visibility and encourage participation. A unit is one meal served/delivered; match required.

**Legal Assistance:** Legal advice or representation provided by an attorney to older individuals with economic or social needs, including counseling or other appropriate assistance by a paralegal or law student acting under the direct supervision of an attorney, or counseling or representation by a non-lawyer where permitted by law. Unit of service is one hour; match required.

**Evidence-based Health and Wellness Programs:** The provision of Evidence-based Health & Wellness programs that include a focus on strength, balance, and flexibility exercise to promote physical activity and/or prevent falls, which have been demonstrated through rigorous evaluation to be evidence-based and effective with older populations. A unit is one class.

**Family Caregiver Day Respite:** Services that provide respite by attendance of the care recipient at a senior center or other non-residential day program. A unit of service is one hour of services; match required.

**Guardianship/Conservatorship:** Performing legal and financial transactions on behalf of a client based upon a legal transfer of responsibility (e.g., as part of protective services when appointed by court order) including establishing the guardianship/conservatorship. A unit is one hour of service.

**Guardianship Diversion Program:** Providing services for clients and/or families intended to help ensure all possible alternatives are explored before the step of Guardianship is taken. A unit of service is one hour.

**C. Current Funding Levels**

The dollar figures below reflect the OAA funding for the period of July 1, 2021 through June 30, 2022.

Current Focal Point Contractors

| <u>Location</u>  | <u>Services Provided</u>  | <u>Total OAA Dollar Amount</u> |
|--|---|--------------------------------|
| Canby Adult Center   | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Outreach<br>Food Service<br>Meal Site Management<br>Physical Activity/Falls Prevention | \$ 253,889                     |
| Friends of Estacada Community Center   | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Outreach<br>Food Service<br>Meal Site Management<br>Physical Activity/Falls Prevention | \$ 117,223                     |
| City of Gladstone  | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Outreach<br>Meal Site Management<br>Physical Activity/Falls Prevention                 | \$ 46,046                      |
| Hoodland Senior Center<br><br><i>Access Point – no senior center available. Activities “out stationed.” Admin. office for centralized service/program coordination and implementation.</i> | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Outreach<br>Meal Program<br>Physical Activity/Falls Prevention                         | \$ 94,320                      |

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|   |  |            |
|---|--|------------|
| City of Lake Oswego   | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Food Service<br>Meal Site Management<br>Physical Activity/Falls Prevention<br>Family Caregiver Respite Program              | \$ 124,877 |
| North Clackamas Parks<br>and Recreation District as<br>Milwaukie Community Center | Info. & Assistance<br>Limited Case Management<br>Reassurance<br>Outreach<br>Transportation<br>Food Service<br>Meal Site Management<br>Physical Activity/Falls Prevention<br>Family Caregiver Respite Program | \$ 451,499 |
| Molalla Adult Comm. Ctr.  | Info & Assistance<br>Limited Case Management<br>Reassurance<br>Outreach<br>Transportation<br>Meal Site Management<br>Physical Activity/Falls Prevention  | \$ 146,107 |
| City of Oregon City as<br>Pioneer Comm. Ctr.<br>(and services for West Linn)      | Info & Assistance<br>Limited Case Management<br>Transportation<br>Reassurance<br>Meal Site Management<br>Physical Activity/Falls Prevention  | \$ 121,780 |
| City of Sandy   | Info & Assistance<br>Limited Case Management<br>Reassurance<br>Transportation<br>Meal Site Management<br>Physical Activity/Falls Prevention<br>Family Caregiver Respite Program                              | \$ 148,693 |

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|                     |   |            |
|---------------------|---|------------|
| City of Wilsonville | Limited Case Management<br>Transportation<br>Reassurance<br>Info & Assistance<br>Meal Site Management<br>Food Service<br>Physical Activity/Falls Prevention | \$ 118,410 |
|---------------------|---|------------|

| <u>County Wide Services</u>                                | <u>Total OAA Dollar Amount</u> |
|--|--------------------------------|
| Guardianship/Conservatorship and Guardianship<br>Diversion | \$ 60,819                      |
| Legal Assistance Services                                  | \$ 15,881                      |

**SECTION II**  
**Response to Notice of Request for Qualifications**

The following items must be submitted with your response:

1. Organizational overview, location, and primary contact person and contact information.
2. Evidence of respondent's legal power to contract for service, incorporation and legal authority to operate in Oregon and enter into contracts or other legal agreements.
3. A description of Insurance and Bonding procedures. (Note: Clackamas County requires a \$1,000,000 general liability per occurrence and \$1,000,000 automobile liability policies each occurrence for Bodily Injury and Property Damage which hold Clackamas County harmless and name as co-insured – Clackamas County, Ride Connection, TriMet and State of Oregon.) Subrecipient is responsible for the cost of required insurance. This cost may not be charged to grant award.
4. A statement of fiscal solvency. (Note: Respondent must be able to ensure working capital to cover program expenses for at least 60 days.)
5. A certified audited financial statement, performed during calendar year 2021 or later.
6. A statement that respondent adheres to Equal Opportunity Employer Affirmative Action standards, Americans with Disabilities Act standards, and have adequate personnel policies in effect.
7. A brief description and history; include relevant experience of organization and staff providing the services proposed for funding.
8. Overview of respondent's facilities if services will be provided on-site. On-site services must be accessible according to the Americans with Disabilities Act standards.
9. A current organizational chart of existing personnel structure.
10. A brief explanation of the services the respondent plans to provide, the geographic area served, and how respondent will coordinate and provide services to ensure meeting the needs of seniors in the community. The proposed array of services must match or surpass current services in specific locations. See "Current Funding Levels" for information on current services by location.



### SECTION III

#### A. Final Notes

Agencies currently providing services **need not** submit a response to this Request for Qualifications. They have been accepted as qualified.

Sections II and III in this Request for Qualifications must be followed. Clackamas County Social Services reserves the right to reject responses which are late or incomplete.

All questions after the release of the Request for Qualifications must be submitted in writing to ADS Contract Specialist by 4:00 PM, March 2, 2023. Questions should be submitted to [ADS-ContractBilling@Clackamas.us](mailto:ADS-ContractBilling@Clackamas.us). Written responses to questions will be made to all providers requesting RFQ's.

Provider RFQ responses must be received at the Clackamas County Social Services office no later than 4:00 pm, March 16, 2023. Responses must be addressed to the attention of ADS Contract Specialist, may be hand delivered or mailed to – 2051 Kaen Road, P.O. Box 2950, Oregon City, OR 97045. Electronic submittals via email will be accepted before the deadline and should be sent to [ADS-ContractBilling@Clackamas.us](mailto:ADS-ContractBilling@Clackamas.us).

The response to the RFQ will indicate your participation and act as a "letter of intent" in any subsequent NOFO process.

*Thank you for your interest in providing services for older adults in Clackamas County.*

**B. RFQ/NOFO TIMELINES****FY2024 – FY2028 Older Americans Act Funded Services**

| <b>Date</b>       | <b>Task</b>  | <b>Action By</b>                |
|-------------------|--|---------------------------------|
| 2/21/23           | Approval of RFQ Packet   | Social Services                 |
| 2/21/23 – 3/16/23 | Advertise RFQ  | Clackamas Cty Finance-Grants    |
| 2/21/23 – 3/16/23 | Distribute RFQ   | Social Services                 |
| 3/2/23            | Deadline for written questions                                     | Submitting Subrecipients        |
| 3/16/23           | RFQ's due to Social Services by 4:00 pm                            | Submitting Subrecipients        |
| 3/16/23 – 3/30/23 | Development of NOFO packets  | Social Services                 |
| 3/23/23           | Review Submitted RFQ's - develop list of qualified applicants.     | Review Committee                |
| 3/30/23           | Distribute NOFO's to qualified applicants                          | Social Services                 |
| 4/13/23           | NOFO responses due to Social Services by 4:00 pm                   | Submitting Subrecipients        |
| 4/20/23           | Review of NOFO responses, selections made                          | Review Committee                |
| 4/24/23           | Approval of selections; Successful offer announced                 | Aging Services Advisory Council |
| 4/25/23           | Award letters issued   | Social Services                 |
| 4/25/23 – 5/9/23  | Appeal Period  |                                 |
| 4/25/23 - 5/15/23 | Draw up agreements with selected agencies, send out for signatures | Social Services                 |
| 5/17/23           | Signed agreements due back to SSD from agencies                    | Selected Contractors            |
| 6/8/23            | Contracts signed/approved at BCC meeting                           | Board of County Commissioners   |
| 7/1/23            | Effective date of contracts  |                                 |
| 7/10/23           | All fully executed agreements sent to agencies                     | Social Services                 |