

OPTIONS SERVICES (HOME SUPPORT and PERSONAL CARE)

Part I

GENERAL INFORMATION FOR THE APPLICANT

PURPOSE

This request for proposal (RFP) provides interested applicants, hereinafter designated as applicants, with information to enable them to prepare and submit proposals for consideration by the Mifflin-Juniata Area Agency on Aging, hereinafter designated as the Area Agency on Aging (AAA) to satisfy the need for Personal Care and Home Support for elderly residents 60 years of age or older, residing in Mifflin and Juniata Counties.

ISSUING OFFICE

This RFP is issued for Mifflin and Juniata Counties by the Mifflin-Juniata Area Agency on Aging Inc., 25 Rothermel Drive, Yeagertown PA, 17099. The point of contact for this RFP is Chelsea Reed, 25 Rothermel Drive, Yeagertown PA, 17099. Chelsea can be reached via phone at 717-320-8290 or email creed@mymjrsc.com.

PROBLEM STATEMENT

The AAA will enter into multiple contracts for OPTIONS services for elderly residents of Mifflin and Juniata Counties to ensure that, if available, consumers will be able to select from among qualified vendors for services. The period of the contract will be from **July 1, 2025 to June 30, 2029** contingent on AAA satisfaction with the services, and based on available funding. Contractors will be required to meet and/or exceed the standards and procedures described in Part IV of this RFP. Applicants may choose to provide all or any of the services outlined.

The contract will be renewable annually without rebidding, contingent on AAA satisfaction with service, price, and successful negotiation of price and terms for the second, third, and fourth years.

TYPE OF CONTRACT

It is proposed that if a contract is entered into because of this RFP, it will be a unit cost contract. A unit is defined as a one-time set up/installation charge and a recurring monthly monitoring charge rendered on behalf of a Mifflin-Juniata Area Agency on Aging referred consumer. Payment by the AAA will be based solely on the consumer service plan's preapproved units rendered.

Negotiations may be undertaken with applicants whose proposals demonstrate that they are qualified, responsible and capable of providing the service as described in Part IV (Scope of Work) of this RFP.

PRIOR COSTS

The AAA is not liable for any costs and/or expenses incurred by the applicant prior to the approval or execution of a contract or incurred by the applicant in connection with this proposal.

REJECTION OF PROPOSALS

The AAA reserves the right to reject any proposals received as a result of this RFP, or to negotiate separately with competing applicants for all or any part of the services described herein. The AAA reserves the right to disqualify any proposal which is not fully responsive to the service specifications, submission timetables and price ceiling contained in this RFP on the basis that it is not responsible. The AAA also reserves the right to waive technical defects in any proposal, at its own sole discretion.

RESPONSE DATE

To be considered, each proposal must meet all the service specifications and must be submitted in a sealed envelope to the Mifflin-Juniata Area Agency on Aging, Inc. on or before **3:00 P.M. May 6, 2025**. The office address is 25 Rothermel Drive, Yeagertown PA, 17099. Please direct the proposal to Chelsea Reed.

PROPOSALS

To be considered, a complete response to this RFP, using the format provided in Part II, must be submitted in two (2) copies to the issuing office. The applicant will make no other distribution of the proposal in response to this RFP. Any proposal received that does not comply with all the above will be rejected. Proposals must be signed by an official authorized to bind the applicant to its provisions. For this RFP, the bid must remain firm for at least one hundred twenty (120) days following submission of the proposal. Although all proposals submitted under this RFP must contain a guaranteed pricing offer, the AAA reserves the right to negotiate prices and other factors with some or all applicants after receiving proposals and prior to making contract awards. Failure to complete any part of this RFP may result in the bidder being disqualified.

DISCLOSURE OF PROPOSAL CONTENTS

The cost and price information provided in the proposal will be held in confidence during the bid process and will not be revealed or discussed with competing applicants. If a proposal contains any information that the applicant does not want disclosed to the public or used by the AAA for any purpose other than evaluation of the proposal, each sheet of such information must be marked as confidential.

ECONOMY OF PREPARATION

Proposals and bids are to be prepared simply and economically, providing a straightforward, concise description of the applicant's ability to meet the requirements of the RFP. The proposal's pages must be numbered sequentially, including all attachments, worksheets, etc. and velo-bound accordingly.

BIDDER'S CONFERENCE

A bidder's conference can be held at the request of the bidding agency. The purpose of the bidder's conference will be to clarify any points in this RFP that may not have been clearly understood. Any applicant questions must be received in writing a week prior to requesting a bidding conference date.

Mifflin-Juniata Area Agency on Aging Inc.'s answers to questions will not be official until verified in writing by the AAA. Answers to questions asked that change or substantially clarify the RFP will be confirmed in writing and copies will be provided to all recipients of the RFP.

It is understood that attendance at the proposal conference is not mandatory, but is encouraged, and is at the expense of the provider. Applicants that fail to attend the vendor conference may not have questions answered unless previously agreed upon arrangements have been made with the AAA.

ORAL PRESENTATION

Applicants may be required to make an oral presentation of their proposal to the AAA to clarify the proposal and to ensure mutual understanding. If necessary, the AAA will schedule these presentations.

CONTRACTOR RESPONSIBILITIES

The selected bidding applicants will be required to assume responsibility for and begin to provide all services offered in this proposal, or those services negotiated separately, whether or not it provides them directly, no later than July 1, 2025. Further, the bidding applicants may not enter into subcontracts for services or functions offered under this proposal without the express written permission of the Mifflin-Juniata Area Agency on Aging, Inc.

OPENING OF BIDS

Sealed proposals and bids will be opened at the Mifflin-Juniata Area Agency on Aging, 25 Rothermel Drive, Yeagertown, PA 17099 no later than May 9, 2025.

MULTI-VENDOR SERVICES

Beginning July 1, 2001 certain in-home OPTIONS services became multi-vendor services. The services that are multi-vendor are PAS, Personal Care, Respite and Non-Overnight Supervision as well as other Home Support Services, Environmental Modifications and all Home Health Services. For AAA approval under this new system, potential providers submit their proposal, in accordance with this RFP. The AAA reviews all proposals to determine whether they meet the requirements of the RFP. If the requirements are met, proposed bids are reviewed. The provider will be approved to provide OPTIONS services/Personal Care and Home Support. The AAA maintains a list of providers for each service. Providers are placed on the list by price – the lowest price bidder is placed on the top of the list. The list is given to consumers when they are ready to begin a new service or when an existing consumer wishes to change their provider. If the consumer does not express a preference for provider, the lowest priced provider is contacted first to see if they can provide the service. Providers are then contacted in order of ascending price until a provider is located to provide service to the consumer.

DECISION DEADLINE

The AAA will make the final decision no later than **May 13, 2025**.

OPTIONS SERVICES

Part II

INFORMATION REQUIRED FROM APPLICANTS

Proposals in response to the RFP must be submitted on the format outline below:

- I. **IDENTIFICATION OF THE APPLICANT AGENCY/BUSINESS.** Must include:
 - a. Name, address and phone number of the Agency/Business
 - b. Name and title of the Administrator or owner
 - c. Type of Agency/Business (i.e. public, private non-profit, minority-administered etc)
 - d. Mandatory retirement? Note that an Agency/Business with mandatory retirement policy is not eligible to contract with the AAA for service provision.
 - e. Geographic area currently serving
 - f. Area that Agency/Business will provide services under this contract

- II. **STATEMENT OF UNDERSTANDING.** Describe in concise terms your understanding of the work to be performed under this contract (see Part IV, under the Scope of Work), stating your understanding of the responsibilities, roles and authority of the AAA and the Applicant in the following areas:
 - a. Consumer needs assessment and reassessment
 - b. Eligibility determination and redetermination
 - c. Service initiation and termination
 - d. Applicant's procedures regarding voluntary contributions from consumers
 - e. The need to provide services in a manner which enhances consumer dignity and which minimizes dependency, specifying the way in which this will be reflected in service delivery
 - f. Applicant's strategy to work cooperatively with other service providers
 - g. Applicant's proposal to ensure that they will have enough staff to meet the needs of the contract

- III. **BACKGROUND AND PRIOR EXPERIENCE**
 - a. Describe the history of the Agency/Organization in providing the specific Options services including, but not limited to, a specific description of the applicant's primary mission and a listing, by name and location, of the organizations which have previously contracted with the applicant for the provision of these services.
 - b. Describe any other similar services that you provide and/or administer.
 - c. Attach for reference the names, addresses and phone numbers of three individuals or agencies for whom you have provided services. Note that letters of recommendation may be attached to the proposal submitted.

- IV. **ORGANIZATION AND MANAGEMENT**
 - a. State the name and title of the person who will have the ultimate responsibility and accountability for this contract.
 - b. Attach an organizational chart that clearly indicates the line of authority for all existing and proposed staff positions.
 - c. Provide assurances that staff will meet State qualifications for the services they will be providing.
 - d. Will attendants, aides and supervisors be insured or bonded?

- e. Submit the applicant's Affirmative Action Plan.
- f. Describe how staff will be supervised.
- g. Describe how feedback will be obtained from consumers to monitor the performance of staff.
- h. Describe or attach a copy of staff training that you provide or require and the number of hours of training required.
- i. Describe how you will evaluate the competence of staff.
- j. Describe how an uneven demand for service will be handled (i.e. how you will handle increases and decreases in service orders).
- k. Describe what you will do to be ready to provide services by July 1, 2025.

V. SERVICE PROGRAM DESCRIPTION

- a. Describe the sequence of action from the time a service order/authorization is received from the AAA through the provision of the service to the time service is terminated.
- b. Describe how staff will be matched to consumers.
- c. Describe how consumer complaints will be handled.
- d. Describe how consumer confidentiality will be maintained.
- e. Describe how, when and by whom changing circumstances or needs of consumers will be observed, reported and acted upon.
- f. Describe the capacity to handle emergency requests for service.
- g. Describe the frequency with which the supervisor will visit the consumer's home for the various services you propose to provide.
- h. Submit verification of Medicare and State certifications.

VI. RECORD KEEPING

Attach copies of forms that will be used to record consumer and service information.

VII. FISCAL MANAGEMENT

Describe procedures for recording consumer service hours and invoicing the AAA monthly for services.

VIII. UNIT OF SERVICE/CONSUMER

A unit is defined as a one-time set up/installation charge and a recurring monthly monitoring charge rendered on behalf of a Mifflin-Juniata Area Agency on Aging referred consumer. Payment by the AAA will be based solely on the consumer service plan's pre-approved units rendered.

Potential bidders should be aware that to provide the above listed services, they will be reimbursed a fixed amount (bid price) per pre-approved consumer units, therefore bid price should include overhead and other costs. The budgeted amount listed is the aggregate amount that will be paid to all the providers (under multi-vendor services). The budgeted amount stated for bidding purposes is approximate, dependent on available funding and demand for services.

IX. PROPOSAL PRICE STATEMENT

This bid statement is presented in response to the RFP issued by the Mifflin-Juniata Area Agency on Aging on April 7, 2025 for the provision of Options services to elderly persons in Mifflin and Juniata Counties.

The _____ (Applicant) duly incorporated under the laws of the state of Pennsylvania and having its office located at _____ hereby offers the following quotation.

Indicate all the services you will provide and the rate for each service. The rate for Mifflin-Juniata Area Agency on Aging is \$21.44 for July 1, 2025 unless otherwise negotiated.

Personal Care:

_____ Yes Rate: _____

_____ No

Home Support:

_____ Yes Rate: _____

_____ No

Executed By: _____

Title: _____

Date Submitted: _____

FOR AAA USE ONLY

Date of opening: _____

Witnesses to Opening: _____

Time of Opening: _____

AAA Director Signature: _____

OPTION SERVICES

Part III

CRITERIA FOR SELECTION

All the proposals received will be evaluated for selecting the proposals that meet the requirements of the RFP.

UNDERSTANDING OF THE PROBLEM: The extent to which the bidding agency demonstrates an understanding of:

1. The respective roles, responsibilities and authorities of the AAA and the applicant agency as described in the RFP
2. The objectives of the AAA are to seek proposals to provide the specified Options services
3. The nature and scope of the service requested
4. The policies and procedures of the AAA established to provide services to eligible older persons

APPLICANT AGENCY EXPERIENCE: The extent to which the applicant agency has:

1. Demonstrated capability to provide the services in terms of the quantity and quality described in this RFP.
2. A visible role in the community and strong working relationship with other service providers.

SOUNDNESS OF APPROACH: The extent to which the applicant agency:

1. Has clearly defined lines of responsibility and accountability
2. Has allocated adequate qualified personnel to deliver service and manage the program as described in this RFP
3. Exercised supervision in the quantity and quality which equals or exceeds that described in this RFP
4. Provides training which equals or exceeds that described in this RFP
5. Has established fiscal management controls and procedures sufficient to ensure accountability in the administration of funds with a clear audit trail which would accommodate a certified/registered public audit, if required
6. Keeps sufficient records to allow for an adequate picture of the agency's program and operation – both for quality of service and fiscal accountability

7. Has demonstrated a capability for effective service provision by outlining a plan for service delivery which:

- Provides for careful consumer service
- Is flexible in terms of hours and duration of service
- Provides the consumer with only the amount of help necessary to meet basic needs and permits as much independent functioning as possible
- Demonstrates willingness to employ older persons and minority persons

BUDGET (UNIT COST): The extent to which the applicant agency has submitted a bid while meeting the quantitative and qualitative service specifications outlined in this RFP.

PERSONNEL QUALIFICATIONS: The extent to which the applicant agency has allocated an adequate quantity of personnel qualified to deliver service and manage the program.

EFFICIENCY: Ability of applicant agency to provide services in a timely manner from the date of service authorization.

OPTIONS SERVICES

PART IV

SCOPE OF WORK

AAA OBJECTIVE

To provide Personal Care and Home Support to the physically and/or functionally impaired and/or chronically ill residents over 60 in Mifflin and Juniata counties.

The most significant benefit will be the improvement of the overall quality of life for the consumer. Other benefits include, but are not limited to:

- Enabling consumers to remain in their own homes with families and appropriate supportive services
- Enabling consumers to return home from hospitals or other institutions without delay and hopefully reducing the overall cost of care per individual
- Reduction in the isolation of disabled individuals
- Improving community-based services and the service network
- Increasing employment opportunities for persons trained as attendants/aides

In all cases, the objective is to enable the consumer to live with as much dignity and independence as their condition permits.

The major goals for the program are to help prevent and/or delay institutionalization and reduce the costs of providing long-term care.

PROJECTED SERVICE LEVELS

The Mifflin-Juniata Area Agency on Aging, Inc. is projecting level funding.

NATURE AND SCOPE OF SERVICE PROVISIONS

Personal Care and Home Support Services will be authorized for consumers whose primary need is assistance with activities of daily living. Home Support and Personal Care both aide in allowing seniors in our community to age at home. The consumer shall be cognitively and functionally capable of understanding the duty and realm of the services. Service may only be provided in accordance with a care plan developed by Mifflin-Juniata Area Agency on Aging, Inc.

MINIMUM STANDARDS AND QUALIFICATIONS

The AAA has the following expectations from the providers who are awarded contracts under this RFP:

1. Applicants will respond to AAA's requests for services within 3 business days between the hours of 8 am and 4pm, Monday through Friday to affirm or decline provision of the service and have a method in place to receive referrals 24 hours a day, 7 days a week.
2. Provision of services will be guaranteed to begin in a timely manner, usually within 5-7 business days of the received initial authorization/service order.
3. The Applicant demonstrates that the provision of Home Support and Personal Care services will be in accordance with the applicable Pennsylvania Department of Aging's Aging Program Rules and Regulations. Aging Directives can be found on the Pennsylvania Department of Aging website located under the Service Providers heading.
4. The Applicant has demonstrated that an adequate number of qualified, experienced and trained management, supervisory and hands-on staff will be in place on the first day of operation and thereafter throughout the life of the awarded contract.
5. Applicants will ensure that staff are properly and safely attired to complete work assignments. Staff will also be provided with and wear identification cards/tags.
6. The Applicant agrees that staff are prohibited from smoking or using other tobacco products while in the home of the consumer.
7. Applicants agree to submit to the AAA reports of supervisory visits upon request.
8. The Applicant understands that, if it has defaulted on a contract or failed to complete any services similar to those in the RFP, without good cause, the Applicant may be disqualified.
9. The Applicant understands that it may be disqualified if; the Applicant has been barred from any government contracts. Has adverse findings from the Equal Employment Opportunity Commission, State Human Resources Commission, or other related state and/or federal entities. Has any unsatisfied judgements or liens filed, or any pending lawsuits against it. Does not have a verifiable record of positive past performance from other purchaser organizations in the provision of services as outlined in this RFP.
10. Criminal record checks, as addressed under Act 169 of 1996, will be required for all proposed new hires. The Applicant incurs the cost of processing the criminal record checks. It is the Applicant's responsibility to determine if the worker is considered a safe hire based upon results of the criminal record check and in adherence to Act 169 of 1996.
11. All staff shall be trained on mandatory reporting in accordance with Act 13 of 1997 of the Older Adult Protective Service Law. The AAA will provide Protective Services training upon request.
12. Applicants are required to maintain any and all training records in order to conform with state licensing requirements.

13. An “incident” report policy is in place that includes a description of what constitutes an incident, outlines a procedure to document incident reports in a consumer’s record, and outlines how, when and to whom an incident report is to be forwarded to.
14. Applicants must establish a consumer complaint and resolution process, which includes written notification to the Agency of all complaints and resolutions within two (2) working days. This process must also provide for immediate verbal notification to the Agency, based on the severity of the complaint.
15. Applicants agree to conduct routine satisfaction surveys of consumers served under this RFP.
16. Applicants will cooperate fully with AAA staff and other providers and staff, and will attend all meetings and monitoring as determined necessary by the AAA.

ELIGIBILITY FOR SERVICE

The contract shall call for the provision of appropriate and ordered services in Mifflin and Juniata Counties in accordance with the AAA’s PDA-approved eligibility and priority setting plan. The final decision-making authority to initiate, continue, terminate, reduce or expand service funded under this contract will rest with the AAA. The AAA will assume responsibility for service coordination when multiple service providers are involved with a consumer. However, the applicant agency must maintain a capacity to directly provide and/or arrange for the provision of services necessary to meet the immediate needs of consumers in emergency circumstances.

SERVICE MODEL

The service delivery model requires the use of trained staff with the applicant agency assuming liability for the provision of the OPTIONS/Home Support and Personal Care. Characteristics of this model include but are not limited to:

- Work schedules that accommodate the consumer/caregiver
- AAA care plan developed with input from the consumer and family
- Physician plan of treatment desirable but not required, unless Home Health services are provided
- Staff are recruited and trained by the contracting agency
- Contracting agency invoicing the AAA only for those services authorized by the AAA

GENERAL SERVICE PROCEDURES - AGENCY

The AAA is responsible for the overall administration of the OPTIONS program. Responsibilities include, but are not limited to:

Services provided under contract are targeted toward the frail elderly, as defined by their level of care, functional ability, medications, hospitalizations, formal and informal support, and financial resources.

These levels are determined through the agency’s Care Management function. This function provides consumers with access to the entire service system and ensures the coordinated timely provision of

single or multiple services. It also determines, in conjunction with the consumer, the effectiveness of the services being provided relative to consumer goals.

The agency provides centralized intake and assessment for requests services outlined in this RFP. Requests for these services will be accepted from provider organizations, other social service organizations, or private individuals.

The agency will conduct an in-home needs assessment to determine consumer eligibility, assessed needs and the availability of funds, and will be at the sole discretion of the agency.

Developing a care plan in conjunction with the consumer and/or significant others and determining the consumer's fee for service based on the consumer's household income and the appropriate sliding fee scale. Authorizing the services, the applicant provider will perform.

Specifying the type, frequency, length and number of units to be provided.

Forwarding the service authorization once the consumer is approved for the service. If the consumer's circumstances are such that immediate service is required, the Agency will verbally authorize the Provider to begin service and will forward a written service authorization to the Provider within two (2) business days.

Reassessing consumer needs per funding source requirements or circumstances warrant.

Evaluating, with the consumer and/or their significant others, whether the services provided are effective in meeting the consumer's goals.

Determining when it is appropriate to terminate services.

Notifying the applicant when termination or other modification of services has been authorized.

Notifying the applicant verbally if services are on hold with verbal follow-up to restart services, or written authorization to change or terminate services.

Promptly advising the applicant of changes in consumer circumstances, which necessitate adjustments in service delivery.

All requests for information, and/or requests for OPTIONS services will be routed to the AAA.

Within ten (10) working days, the care manager will make a home visit.

The care manager will provide information and discuss procedures for receiving OPTIONS services. A consumer assessment will be completed, and eligibility will be determined based on current policy. Included in the consumer assessment is the amount of caregiver support.

If the consumer meets the requirements for eligibility and agrees to the provisions of the service, the care manager devises a care plan for the consumer. The care manager reviews the care plan with the consumer to ensure that the consumer fully understands the service(s). The consumer/caregiver is an integral part in determining the number of service hours needed. If the consumer understands and agrees to the care plan, (s)he signs the plan. The care manager then refers the case to the care management supervisor, who has the final decision-making authority on the appropriateness of OPTIONS services for the consumer. The consumer has the right to select any provider from a list of contracted providers.

If a waiting list exists, the consumer will be placed on the list utilizing the score obtained in the Needs Assessment Score (NAS).

When services are initiated, the care manager will complete a follow-up within two weeks to determine whether services were begun and are satisfactory, and that the service meets the identified need.

The care manager in accordance with the individual's consumer contact schedule will complete reassessments.

Either the consumer, the family or the AAA can initiate terminations. When the AAA terminates a case, the care manager will inform the consumer and the family, if appropriate, stating the reason for termination and providing a right of appeal notice.

If a consumer is denied services, she/he will be sent a right of appeal notice and the agency Ombudsman will be available to assist in completing forms. (The care manager will assist the consumer in arranging for other services to help meet his or her needs).

GENERAL SERVICE PROCEDURES - APPLICANT

The contracting agency is responsible for providing direct OPTIONS/Home Support and Personal Care services in the home and as set forth in the AAA directives, rules and regulations. Responsibilities which may vary depending on the service, include, but are not limited to:

Recruiting, hiring or subcontracting with and training workers.

Matching workers with consumers.

Developing a service plan, based on the service authorization and communicating this plan with the AAA care manager.

Directly contact the consumer's physician, if necessary, for the completion of the service plan.

Maintaining a pool of qualified workers.

Submitting invoices for authorized services by the 10th working day of the month.

Meeting, as needed, with the AAA, for case review and service issues review Assigning, placing and supervising the employees responsible for the delivery of services. All employees assigned shall be hired in accordance with applicable standards.

Initiating service within five (5) working days of receipt of service authorization. However, the Provider shall provide the services necessary to meet the immediate needs of consumers in emergencies, upon receipt of verbal authorization.

Confirming, in writing, the date service is initiated, using forms provided for this purpose.

Providing prompt notification of any significant changes in the consumer's condition or circumstances.

Providing immediate notification to the agency when a scheduled consumer visit is not done. This includes notification whether the visit is not completed as result of the applicant or consumer.

Providing notification, no later than the following working day when circumstances may necessitate termination of service.

Maintain necessary documentation of the provision of services to consumers.

Applicants must be certified and in complete compliance with State and Medicare regulations, as applicable.

COORDINATION WITH EXISTING AGENCIES/PROGRAMS

The AAA will work with all social service agencies in Mifflin and Juniata counties to coordinate, plan and implement the services needed for the OPTIONS consumer. If a person is determined to be ineligible, following the consumer assessment, the referring agency will be notified of the determination. A combined effort will then be made by the referring agency, the consumer and/or family and the AAA to provide alternatives for consumer care.

Successful providers are expected to follow all applicable rules regarding OPTIONS services.

The successful provider agencies will be expected to forward contributions and memorials received from AAA contracted consumers to the AAA. Contributions (including memorials) are the property of the AAA and revert to the AAA. Part of the established practices of the AAA for periodic fiscal monitoring of the providers may include (1) verification of reported contributions and (2) a review and evaluation of the procedures followed in collection, processing and accounting of consumer contributions.