North Bay Regional Center
Request For Proposal
2011 - 2012

Introduction

North Bay Regional Center (NBRC) is a private non-profit agency under contract to the Department of Developmental Services to provide services to people of all ages with developmental disabilities. For this **Request for Proposal (RFP)** NBRC is seeking qualified business services or agencies to provide money management services to the North Bay Regional Center consumers residing in Napa, Solano and Sonoma Counties. NBRC currently is payee for 1300+ consumers with approximately two thirds of those residing in licensed residential care and the remaining one third living in independent/supported living or in a family home. Payee funds include all Social Security Administration programs as well as Railroad and other retirement plans.

Description of Need

The instructions below along with enclosed **Attachment A**, RFP 2011-2012 listing, describes the service for which the RFP is being sought. *Proposals must reflect the needs and expectations as stated in the instructions below as well as in* ***Attachment A***. Applicants whose proposals most closely meet the stated needs will be selected for interviews by the review committee.

Orientation Session

Where:	North Bay Regional Center- Napa Office 10 Executive Court, Napa
***Date*:**	Thursday, October 6, 2011
Time:	10:00 to 11:30 a.m.

Specific information will be provided regarding the service need and the selection process. Attendees will have the opportunity to ask questions. If additional clarification is needed call Adele Butler, Clinical Resource Consultant, at (707) 256-1209.

Instructions for Submitting Proposal

The following must be submitted in order for the proposal to be considered:

1) **Proposal Title Page (Attachment B)**

2) **Resume of principals must include:**

   - Statement describing current business operations providing money management services. Include names of regional centers or other relevant contracts served.
   - Documentation of education/training in: social security benefits and representative payee services; accounting/bookkeeping as related to performing trust accounting of SSA/SSI and other public benefits.
   - Documentation of experience and competence in: providing representative payee services of public benefits.
   - Documentation of experience and/or education that the applicant possesses to own and operate a *Best Practice* money management business.
   - List of professional references with name, address, and phone number of at least two persons/agencies to verify fiscal stability and at least two persons/agencies to verify related business/ administrative experience.

- Evidence of financial stability and ability to obtain bonding and insurance(s) related to operating a money management business.

3) **Service /Business Description**

A proposed service description, similar to a business plan, which addresses all the topics below must be submitted for interview consideration. **Attachment A** describes the *Expected Services* of a money management service. Additional topics applicants deem to be important are welcome to be included in their proposal.

An approved service design is required for vendorization. Applicants selected will collaborate with NBRC staff to identify additional service areas which require defining and detailing in order to provide a Best Practice money management service to NBRC clients.

Initial service descriptions must at a minimum include the following:

1. Statement of philosophy and attitudes motivating interest in providing a money management service for persons with developmental disabilities.
2. Statement of philosophy in developing cooperative working relationships with NBRC and Social Security Administration in meeting consumers' needs and in complying with laws and regulations that govern representative payee services.
3. A business plan, with organizational chart, that describes the structure of the business and department functions.
4. A business plan that identifies a possible location for service delivery in the NBRC catchment area of Napa, Solano, and Sonoma. Location should allow accessibility by clients. Accessibility should include proximity to a local bus stop(s) as well as meet ADA accessibility standards.
5. A business plan of the proposed money management processing procedure utilizing the principles of SSA Best Practices of Organizational Representative Payees. Include: flow chart of the trust process; system of tracking earnings for clients under Ticket to Work and those with Substantial Gainful Activity (SGA) earning limitations; and re-determination procedures.
6. Description of process of assuring client has access to all generic resources and benefits linked to primary benefit packages including but not limited to dental, transportation to appointments, long term care, and pharmacy benefits.
7. Descriptions for all staff positions to include: education and experience qualifications; desired skills and knowledge; and job duties and responsibilities.
8. Description of hiring and screening procedures for employees to work with confidential financial information and dependent adults
9. Statement describing experience in working with persons with disabilities, who may have limited expressive language ability as well as limited capacity to understand money, time, and business procedures for receiving and issues checks. And, who when faced with delays may demonstrate reactive and impulsive behaviors.
10. Description of experience in working with persons/agencies that support persons with developmental disabilities including but not limited to: supportive living agencies, residential care providers, landlords, utility companies, and parent/caretakers.
11. Description of experience in working closely with persons of diverse cultures and backgrounds, for who English may be second language including those

who use special equipment to communicate.

4) **Transition and Timeline Schedule**
Provide a tentative transition plan for the changing of payee services between agencies. Specify capacity of applicant agency to accept new payees. Identify initial systems and communications that need to be established to make a smooth transition and identified benchmarks towards completion of the process.

Request for Proposal Process:

1. The contact person for this project is Adele Butler, Clinical Resource Consultant. She may be reached at (707) 256-1209.

2. The orientation session will be held on **Thursday, October 6, 2011** at **10:30 A.M**. as described above.

3. The applicants will **submit six (6) copies** of their proposal to NBRC, Napa office by **October 27**, at **5:00 p.m**.

4. It is anticipated that oral interviews will be scheduled during the first two weeks of November.

5. Adele Butler will notify all applicants in writing of the Selection Committee's decision related to their proposal. In the event that no proposals are selected, NBRC may re-solicit, withdraw the RFP, or negotiate with any potential provider NBRC identifies as being able to meet the need. The decision of NBRC is final and **not** subject to an appeals process.

Summary of Time Lines for Requests for Proposals:

Orientation: October 6, 2011
Orientation meeting for people interested in the Request for Proposal. The meeting will be held at NBRC's Napa office 1:30-3:00 PM. Reservations are not required.

Proposal Due Date: Thursday, October 27, 2011
Six (6) copies of each proposal, RECEIVED by 5 pm at the Napa location of North Bay Regional Center. Postmarks of October 27th will not be accepted unless the proposal is received by 5pm on that date. Proposals may be mailed or dropped off to:

ATTENTION:
Adele Butler, M.A.
Clinical Resource Consultant
North Bay Regional Center
10 Executive Court
P.O. Box 3360, Napa, CA 94558.

November 2011
Interviews for finalists with review committee. Adele Butler will schedule Interviews with selected applicants. Interview questions will not be provided to applicants prior to the interview. All interviews will be at the NBRC office in Napa.

Letters mailed to inform applicants of the status of their proposals.