

## ADDENDUM

### Medical Case Management (MCM) Request for Proposals FY 15-16 Enhance available HIV Care & Treatment Services- for eligible people in Alameda County

#### BIDDERS CONFERENCE- September 18, 2014

The following are a list of the individuals that were in attendance at the Bidders Conference.

**Schedules: 10:00AM-12:00PM Attendees:** Case Management Services located in a medical-setting. Actual time: 10:10am Bidder Conference adjourned: 10:40am

NAME	AGENCY	EMAIL	MAILING ADDRESS	PHONE
STEPHANIE HERNANDEZ	AIDS HEALTHCARE FOUNDATION	<a href="mailto:Stephanie.hernandez@aidshhealthcarefoundatio&lt;br/&gt;n.org">Stephanie.hernandez@aidshhealthcarefoundatio n.org</a>	400 30 <sup>th</sup> STREET SUITE 300, OAKLAND, CA94609	415-816-8861
DEBORAH WORKMAN	LIFELONG MEDICAL CENTER	<a href="mailto:Dworkman@lifelongmedical.org">Dworkman@lifelongmedical.org</a>	2344 6 <sup>th</sup> STREET BERKELEY, CA 94712	510-981-4177
KOJI SAKAKIBARA	ASIAN HEALTH SERVICES	<a href="mailto:Ksakakibara@ahschc.org">Ksakakibara@ahschc.org</a>	818 WEBSTER STREET OAKLAND, CA 94607	510-986-6830 x371
TERESA COURVILLE	CHILDREN'S HOSPITAL- OAKLAND	<a href="mailto:Tcourville@mail.cho.org">Tcourville@mail.cho.org</a>	747 52 <sup>nd</sup> STREET OAKLAND, CA 94609	510-428-3885 x2827
MICHAEL ZANE	TRI-CITY HEALTH CENTER	<a href="mailto:Mzanee@tri-cityhealth.org">Mzanee@tri-cityhealth.org</a>	1999 MOWRY AVENUE FREMONT, CA 94538	510-456-3522
KEITH WALTRIP	ACPHD, OAA	<a href="mailto:Keith.waltrip@acgov.org">Keith.waltrip@acgov.org</a>	1000 BROADWAY, STE 310 OAKLAND, CA 94607	510-268-7653
MICHAEL LEE	ACPHD, OAA	<a href="mailto:Michael.lee@acgov.org">Michael.lee@acgov.org</a>	SAME AS ABOVE	510-268-7641
LORENZO HINOJOSA	ACPHD, OAA	<a href="mailto:Lorenzo.hinojosa@acgov.org">Lorenzo.hinojosa@acgov.org</a>	SAME AS ABOVE	510-268-7645
PAM CASEY	ACPHD, OAA	<a href="mailto:Pam.casey@acgov.org">Pam.casey@acgov.org</a>	SAME AS ABOVE	510-268-7651
JAMEELAH MUWWAKKIL	ACPHD, OAA	<a href="mailto:Jameelah.muwwakkil@acgov.org">Jameelah.muwwakkil@acgov.org</a>	SAME AS ABOVE	510-268-7648

**Schedules: 1:30PM-3:30PM Attendees:** Case Management Services located in a community non-medical setting. Actual time: 1:35pm Bidder Conference adjourned: 2:07pm

NAME	AGENCY	EMAIL	MAILING ADDRESS	PHONE
OPHELIA LONG	BAY AREA CONSORTIUM FOR QUALITY HEALTH CARE	<a href="mailto:Ophelia.long@sbcglobal.net">Ophelia.long@sbcglobal.net</a>		
JARCKHYE COVARRUBIAS	EAST OAKLAND COMMUNITY PROJECT	<a href="mailto:Jarckyec@eocp.net">Jarckyec@eocp.net</a>	7515 INTERNATIONAL BOULEVARD OAKLAND, CA 94621	510-736-3608
TONI DUNBAR	YVETTER A. FLUNDER FOUNDATION	<a href="mailto:T_dundar@pacbell.net">T_dundar@pacbell.net</a>	8400 ENTERPRISE WAY OAKLAND, CA 94621	415-728-7709
WENDY JACKSON	EAST OAKLAND COMMUNITY PROJECT	<a href="mailto:Wendyuackson@gmail.com">Wendyuackson@gmail.com</a>	7315 INTERNATION BOULEVARD OAKLNAD, CA 94621	510-368-1826
STEPHANIE CORNWELL	CAL-PEP	<a href="mailto:Scornwell@calpep.org">Scornwell@calpep.org</a>	2811 ADELIN STREET OAKLAND, CA	510-874-7850
STEPHANIE CORNWELL	WORLD	<a href="mailto:Scornwell@womenhiv.org">Scornwell@womenhiv.org</a>		510-986-0340
SEAN KIRKPATRICK	CHAA	<a href="mailto:Sean.kirkpatrick@chaaweb.org">Sean.kirkpatrick@chaaweb.org</a>	268 GRAND AVENUE OAKLAND, CA	510-282-7550
AMY LAM	CHAA	<a href="mailto:Amy.lam@chaaweb.org">Amy.lam@chaaweb.org</a>	268 GRAND AVENUE OAKLAND, CA	510-282-7550
KEITH WALTRIP	ACPHD, OAA	<a href="mailto:Keith.waltrip@acgov.org">Keith.waltrip@acgov.org</a>	1000 BROADWAY, STE 310 OAKLAND, CA 94607	510-268-7653
MICHAEL LEE	SAME AS ABOVE	<a href="mailto:Michael.lee@acgov.org">Michael.lee@acgov.org</a>	SAME AS ABOVE	510-268-7641
LORENZO HINOJOSA	SAME AS ABOVE	<a href="mailto:Lorenzo.hinojosa@acgov.org">Lorenzo.hinojosa@acgov.org</a>	SAME AS ABOVE	510-268-7645
PAM CASEY	SAME AS ABOVE	<a href="mailto:Pam.casey@acgov.org">Pam.casey@acgov.org</a>	SAME AS ABOVE	510-268-7651
JAMEELAH MUWWAKKIL	SAME AS ABOVE	<a href="mailto:Jameelah.muwwakkil@acgov.org">Jameelah.muwwakkil@acgov.org</a>	SAME AS ABOVE	510-268-7648

**INTRODUCTIONS:** Keith Waltrip, Director Office of AIDS Administration, as well as those in attendance (listed above).

**PURPOSE OF MEETING:** Conference for potential bidders for Medical Case Management (MCM) Enhance available HIV Care & Treatment Services- for eligible people in Alameda County. The Bidders Conference was recorded in order to share the information via the Addendum regardless of attendance. All questions will be answered by the Addendum.

**COMPETITIVE PROCESS (Overview)** — Michael Lee, LCSW; Program Manager OOA

Please review Page 12 of the Request for Proposal highlighting the Calendar of Events:

EVENT	DATE/LOCATION	
Request Issued	<b>September 8, 2014</b>	
Written Questions Due	<b>September 23, 2014 by 2:00 p.m.</b>	
Networking/Bidders Conference	<b>September 18, 2014 from 10:00am-12:00pm 1:30- 3:30pm</b>	at: 1000 Broadway Suite 310 Oakland, CA 94607
Addendum Issued	<b>September 26, 2014</b>	
Response Due	<b>Friday, October 17, 2014 by 2:00 p.m.</b>	
Evaluation Period	<b>October 20<sup>th</sup> - November 7, 2014</b>	
Vendor Interviews	<b>November 12<sup>th</sup> -November 26<sup>th</sup> (If needed)</b>	
Board Letter Recommending Award Issued	<b>December 15, 2014</b>	
Board Consideration Award Date	<b>To be determined board agenda dates are not available yet</b>	
Contract Start Date	<b>March 1, 2015</b>	

\* **Note:** Award and start dates are approximate.

- Addendum:** Refers to additional information including questions asked at this Bidders Conference and/or any other additional information, issues. All questions about the RFP are due to Keith Waltrip [keith.waltrip@acgov.org](mailto:keith.waltrip@acgov.org) by **September 23<sup>rd</sup> 2:00pm**. Answers will be provided via the Addendums to all participants by **Friday, September 26, 2014**.
- Hyperlink:** Correct link: <http://www.acphd.org/oaa.aspx>
- Response Date: Proposals are due Friday, October 17<sup>th</sup> by 2pm.** Bids are to be addressed and delivered as follows: CASE MANAGEMENT- MEDICAL services for People Living With HIV/AIDS in Alameda County RFP FY2015 Office of AIDS Administration Alameda County Department of Public Health 1000 Broadway, Suite 310

Oakland, CA. 94607. Please deliver one (1) original proposal with five (5) copies. Original proposal is to be clearly marked “ORIGINAL” with copies to be marked “COPY” All copies must be organized and collated – **the OAA will not make any copies of any documents.** Please note neither disk nor electronic copies will be accepted- hard copies only. Proposals at time of submission will be OAA stamped with the date/time received and a receipt will be provided. No late proposals will be accepted. Please refer to the RFP page 23- page 24 under the Submittal of Bids sections for additional details.

- **Evaluation Period:** This refers to the panel review process, with objective and independent panel reviewers - who will read, score, and review all proposals that are submitted. If necessary, the OAA will conduct vendor interviews (usually this will happen, if there is a close scoring proposals), we ask the top vendor (s) to participate in oral interviews tentatively allotted for the November 12<sup>th</sup>- November 26<sup>th</sup> , 2014 (one hour per proposal).
- **Board Letter:** The board letter recommending the award, is tentatively set for December 15<sup>th</sup> per above. The Board agenda dates were not available at the time that we released the RPF-we will provide that as soon as we are notified of the date. Tentative start date for the contract is March 1<sup>st</sup>. Please note that the calendar of events (RFP pg 12) is very important as late proposals will not be reviewed.
- **Total Grant Award:** The total grant award is **\$961, 534**. Please refer to page 11, as with all federal funding- budgets change from year to year; the figure above is an estimate.
- **Performance Requirements:** Please note and be aware of the performance requirements for each service category listed in the request for proposals (page 21 & 22)
- Show the cost per Units of Services (UOS) & cost per Unduplicated Clients (UDC) must be shown in the report. We are looking to see the range between agencies; hospital based agencies verse community based agencies (additional information). An Addendum will be issued to the Proposals on September 26<sup>th</sup> the questions will be due September 23<sup>rd</sup> at 2pm via e-mails to Keith Waltrip (OAA, Director) at [Keith.waltrip@acgov.org](mailto:Keith.waltrip@acgov.org)
- RFP includes a responses regarding agencies ability to provide evening and weekend hours & extended time to allow for more availability to patients- agencies are encouraged to summarize extended hours in the proposals. Extended hours and weekend times are becoming increasingly important to clients.

**Questions & Answers during the Bidders Conference: (Morning & Afternoon Conference):**

1. Pg. 7(D-1): According to the RFP: Bidder shall be regularly and continuously engaged in the business of providing Case Management- Medical services to People Living with HIV/AIDS in Alameda County for at least five (5) years.

**Answer: We caught this error after the releasing of the RFP. Three (3) years with Case Management Medical Services.**

2. Pg. 11 (C): The range of the grant amount that we will be giving out for each of the two categories are as followed; We are having one RFP, but two current amounts; one under medical sites and the other under non-medical sites. The funding range for Primary Care based sites is \$60,000- \$175,000 and the range for community bases sites is \$45,000- \$70,000. Medical Case Management (MCM) is \$961,534 (Refer to RFP page 11)

3. Pg. 7 (Exhibit A): Bid Form- Cost per Unit of Service

**Answer: The Cost per Unit of Service is determined by the calculations used by the agencies. Make certain the Cost per Unit of Services is included in the proposals.**

4. Pg. 11 (Exhibit A): Any exceptions with the RFP process?

**Answer: If applicable to agencies, all processes must be submitted with the RFP proposals; an example could be vendor takes exceptions that services will be provided to clients in Alameda County. It doesn't impact your score- it's a way for agencies to say as an example: "I agree with this- I have issues with this."**

5. First related to Alameda County, previously we were counting our clients in Alameda County and Contra Costa County who are Pediatrics, is allowed for this RFP?

**Answer: Technically, we are supposed to see both, because it is one TGA and it's certainly allowed. The issue is if it starts to really impact- as it has one or two other agencies. But with Children's Hospital they weren't seeing that many, just from Contra Costa- and there are no other TGA in Contra Costa County.**

6. On page 24 there is mention of an electronic copy for the proposals, is this permitted?

**Answer: Disregard that information. Please deliver one (1) original proposal with five (5) copies. Original proposal is to be clearly marked "ORIGINAL" with copies to be marked "COPY" All copies must be organized and collated.**

7. Pg 7 (Exhibit A): Include a 12- month budget and narrative (see attachments C & D) for Budget Bid Form with line items and narrative- However C & D were not included in the RFP, will those attachments be included?

**Answer: The attachments are a structure for the budget, yet for those of you who already have a contract with us- in other words the budget format that is used for previous contracts with us- can be used within the RFP proposals; we will send it with the Addendum.**

8. Is there a C & D attachment, will there also be an A & B attachment?

**Answer: A & B are included within the RFP, C and D will be included within the Addendum.**

9. On pg 9 Exhibit A- Key Personnel (A-E): Do you want the personnel and all of their information listed? Do you want tables or do you want a particular format with their information listed within the tables, and do you want CVs (Curriculum Vitae) attached?

**Answer: No CVs (Curriculum Vitae) required – just state credentials and role.**

10. And under number 5 on that same page (page 9) (Description of the Proposed Program): The last sentence under number 5, it states “the description shall include any disadvantages or limitations that the County should be aware of in evaluating the RFP. Finally, the description shall describe all warranties provided by Bidder.”

**Answer: Disregard this from the MCM-RFP.**

11. A more general question regarding the funding opportunity, can you talk about partnership opportunities between Medical Providers and Community- based Providers- who can be the lead agency , whether an agency can apply under two categories as a partner and how can a partnership fit within this because the funding is broken apart.

**Answer: All agencies are encouraged to be as creative as possible and certainly agencies joining together are encouraged, given that the amount for the Hospital Based or Medical Based is higher than the Community Based. If an agency is applying through the Community-Based the maximum is \$70,000. Medical-Based agencies cannot apply for and receive Community-Based funding. An agency applying under the Community-Based funds, the funding will be for the Community-Based.**

12. So a Medical-Provider could apply under a Community-Based if they are partnered with someone to provide services at a non-medical setting?

**Answer: No, a medical provider cannot provide funds to Community-Based agency under this RFP. A medical provider must apply for Medical-Based funding.**

13. So, the partnership would determine who is applying as a lead agency and where those services are offered, correct?

**Answer: Yes.**

14. How can an agency partner? Is it best to subcontract?

**Answer: An agency can subcontract within their distinction as a Medical-Based Setting or Community-Based Setting. A Community-Based site can describe in their RFP that they are able to link to a Medical Provider for care; this can be an MOU (Memorandum of Understanding). A Community-Based site should describe how it will ensure clients are receiving the necessary services based upon the guidelines in the RFP. Community-Based, Medical-Case Management must be directly linked to a Medical Provider, as mentioned through a MOU as an example. Funding from Medical-Based cannot be provided to a Community-Based site under this RFP. This would need to be a separate application not a financial partnership.**

15. Can a Community-Based Service Provider come to a particular site to help the clients?

**Answer: That Community-Based site would need to have received the funding from MCM. The Community-Based Service Provider is allowed to come on site to the Medical- Based Agency for example three days a week; this would be an example of a great partnership. The funds would still go the Community-Based Provider.**

16. If the services are provided at the Medical Site, the Community-Based agency is not funded, can these services be provided at a primary care site? So, it's not about where the services are provided, yet it's about who providers those services?

**Answer: We don't have any services like this currently being provided this way. It's not that this partnership can't happen, yet most of our clients go to a Medical-Based site for most services. MCM services can be provided off-site, at the Community-Based agency, the Medical-Based agency would receive the funding.**

17. On page 7 of the RFP- number one under Bidder Minimum Qualifications, we currently do not receive funds from OAA under Case Management, but we do provide some services for HIV/AIDS patients, my question is, will an agency be qualified to apply for this RFP if Case Management funds are awarded from another entity? What is meant by this if the agency currently does not receive funding from OAA- with regards to Case Management? Would an agency qualify to apply for this RFP?

**Answer: An agency does not have to be funded through the OAA- yet they do need to describe the services they have been providing for example SAMSHA or another**

**source, the importance is being able to show that your agency has provided Case Management Services.**

18. Also, with the Medi-Cal Services, I am not familiar with the Medi-Cal under the Case Management, yet in the RFP page number 8 line D: After the Affordable Care Act (ACA) most of our clients have Medi-Cal, some of the services are covered by Medi-Cal and some aren't, so I would like to know which of the services can be paid by this grant?

**Answer: The person that does the Medi-Cal at this particular agency is the best person to collaborate with regarding the best approach. In other words, each agency should consult with the individual at their facility to get the best advice. All of our agencies must show that they are not billing Ryan White for anything that Medi-Cal will cover. Medi-Cal does not pay for Medical Case Management for HIV.**

19. The Office of AIDS Administration has a review of panelists (the name of the panelists are never disclosed) to analysis the proposals. The panelists are provided a packet for completing the evaluations; once the proposals are reviewed, a meeting with the review panelist is conducted and they make recommendations on which proposals to award.

**Answer: If needed will we conduct oral interviews and those agencies will have up to an hour during the interview process (if needed). For example, if we receive 10 proposals and they all come in with the exact same score- at this point interviews will be conducted with all 10 agencies and the reviewers will do additional scores and/or rankings to determine who they will recommend that OAA funds.**

20. Does Invoicing need to be mentioned regarding Ryan White Part A?

**Answer: That would be done during contract negotiations; this does not need to be mentioned in the RFP proposals. There are restrictions regarding invoicing with submitting supportive documentations.**

21. Page 11: The funding range for Primary Care Sites is \$60,000-\$175,000 do you have any expected number of how many patients should be served within this dollar amount?

**Answer: That would be for the agencies to determine in their RFP application. We ask for a breakdown per client and how much per Unit of Service (UOS).**



**Questions submitted after the Bidders Conference:**

1. Will there be an additional opportunity to apply for Ryan White Part B Funding for Case Management- Medical Services? We are trying to understand if the funding under this current Part A RFP would supplement or replace current Case Management funding under Part B?

**Answer: This RFP is for Part A MCM only. At this time there are no plans to RFP Part B Medical Case Management.**

2. If Agency A (Primary Care/Medical setting) is the lead organization applying for a clinic-based grant, can they include Agency B (Community Based Site) as a behavioral health provider for co-occurring mental health, alcohol, tobacco and other drugs use, Domestic Violence (DV), problem gambling, etc., with a clinic setting through a direct subcontract?

**Answer: Agency A could include Agency B in their application as a location to locate clients and/or provide Medical Case Management (MCM) services. Should Agency A be awarded under this RFP, they could not subcontract any of these funds to Agency B. This RFP is for MCM services only; no other services can be paid for under this RFP. Mental Health, substance abuse, etc. are separate funded categories.**

3. Will there be another opportunity to get the information that was discussed at last week's meeting?

**Answer: An Addendum will be provided with all the questions/answers and information shared at the Bidders Conference on Friday, September 26, 2014. It will also include attachments which can be utilized as reference documents; Scope of Work and Budget Summaries also referred to as Justification and/or Narratives.**

4. Will the pages of RFP Exhibit "A" be available as a Word document (.doc or .docx)?

**Answer: All documents pertaining to Medical Case Management (including Exhibit "A" are available as pdf files on the Office of AIDS Administration website ([www.officeofaids.org](http://www.officeofaids.org)). Unfortunately, RFP Word documents are not available for distribution.**

5. What are the margins, fonts, and font size restrictions?

**Answer: In regards to the margins, fonts, and font size restrictions. Use 1-inch margins, 12-font size, and Times New Roman.**

6. Is the Vendor Bid List to be attached or released by the County of Alameda?

**Answer: Yes, the Vendor Bid List will be sent as an attachment along with the Addendum, as well as the following documents; Scope of Work and Budget**

**Summaries also referred to as Justifications and/or Narratives will be included in the attachments.**

7. Are applicants required to submit a budget summary and budget narrative?

**Answer: Yes, applicants are required to submit a Budget Summary and Narrative. Format will be provided via the Addendum.**

8. Will the County of Alameda provide Budget Templates?

**Answer: Yes, we have attached a Budget Template along with the Addendum as well as examples of the following documents: Scope of Work and Budget Summary.**

9. Does the RFP have a defined page limit or character counts?

**Answer: There is no standard page limit; all proposals should be as succinct as possible, covering all necessary information in accordance to the requirements of the RFP. There is no character count, as previously stated, be brief in your responses.**

## **EXHIBIT C**

### **VENDOR BID LIST**

#### **RFP FY2014- Case Management- Medical: HIV Care & Treatment Services for People Living with HIV/AIDS in Alameda County**

Below is the Vendor Bid List for this project consisting of vendors who have responded to RFP FY15-16, and/or been issued a copy of this RFP. This Vendor Bid List is being provided for informational purposes to assist bidders in making contact with other businesses as needed.

1. AIDS Healthcare Foundation
2. Asian Health Services
3. Alameda Health System
4. Alameda Health Consortium
5. AIDS Project of the East Bay
6. Allen Temple Baptist Church AIDS Ministry
7. Bay Area Consortium for Quality Health Care
8. California Prostitute Education Project
9. Children's Hospital Oakland
10. Community Health for Asian Americans
11. Community Care Services
12. East Bay Community Law Center
13. Est Bay Community Recover Project
14. East Bay AIDS Center
15. East Oakland Community Project
16. Family Support Network
17. HIV Education and Prevention Project of Alameda County
18. Lifelong Medical Care
19. La Clinica de la Raza
20. Pacific Center
21. Project Open Hand
22. Resources for Community Development
23. Tri-City Health Center
24. Women Organized to Respond to Life Threatening Diseases
25. Yvette A. Flunder Foundation