



**Aging and Disability Resource Center of the North**  
*Serving Ashland, Bayfield, Iron, Price and Sawyer Counties*  
**1-866-663-3707**

## **Request for Proposal**

**Aging and Disability Resource Center of the North – Coordinator**

**Due 4:00 p.m.**

**Monday**

**September 16, 2019**

## Introduction:

### A. General Information:

Notice of Invitation – The Aging and Disability Resource Center of the North (ADRC–N) invites qualified contractors to submit a proposal to provide leadership and oversight of the ADRC–N. This position answers to the ADRC–N Governing Board but works at the direction and in partnership with the ADRC–N Management Team, which consists of the Director of the Departments of Human Services or Health and Human Services of Ashland, Bayfield, Iron, Price and Sawyer Counties.

There is no expressed or implied obligation for the ADRC–N to reimburse contractors for any expense incurred in preparing a proposal in response to this request. Any qualified independent contractor or agency responding to this request is eligible to apply.

1. **Material Submission** – Prospective contractors shall submit detailed information that documents their qualifications, experience and skills to help determine them eligible for this contract. Proposals must be submitted at or before 4:00 p.m. September 16, 2019. Envelopes must be marked “**Sealed Response to ADRC–N Coordinator Request for Proposal – Do Not Open**”. Proposals are to be mailed or hand delivered to:

Bayfield County Department of Human Services  
Attn: Elizabeth Skulan  
P.O. Box 100  
117 East Fifth Street  
Washburn WI 54891

2. **Technical Assistance** – Technical assistance regarding the application is available upon request. All request for technical assistance shall be forwarded by e-mail to:

Elizabeth Skulan  
Bayfield County Department of Human Services Director  
[eskulan@bayfieldcounty.org](mailto:eskulan@bayfieldcounty.org)

Responses to all questions will be posted on the ADRC–N website along with this RFP.

3. **Proposal and Copies** – The application materials shall be submitted. No additional copies are necessary.
4. **Contractor Responses** – Contractors responding to this RFP will be required to meet all the requirements of the RFP. The determination of whether an application meets all RFP conditions shall remain solely with the ADRC–N Management Team.
5. **Withdrawal of Applications** – Proposals may be withdrawn by written notice either in person or by e-mail to the address or e-mail listed for Material Submission and Technical Assistance in numbers 1. And 2. Above.

6. **Termination of Agreement** – ADRC–N may terminate this award at any time at the sole discretion of the ADRC–N Management Team as recommended to and approved by the ADRC-N Governing Board by delivery of a sixty-day written notice to the contract recipient.

## **B. Program Funding**

This contract is funded with state and federal funding allocated to the ADRC – N for regional activities. The continuation of the contract will be dependent upon ongoing funding from the State of Wisconsin to the ADRC–N.

## **C. Evaluation and Selection of Proposals**

All Applications received will be reviewed on a competitive basis by the Management Team of the ADRC-N and ranked accordingly. The Management Team will be responsible for the review and evaluation of contractor applications. The following criteria will be considered in the evaluation:

1. No conflicts of interest exist regarding any other work performed by or for any of the five counties.
2. The application is prepared and submitted as defined in the RFP.
3. The contractors experience and performance on similar contracts.
4. Other criteria as deemed appropriate by the ADRC-N.
5. A successful interview with the ADRC-N review committee.
6. The ADRC–N reserves the right to retain all proposals submitted and owns them regardless of whether that proposal is selected.

## **D. Award Process**

Applications will be ranked by the Management Team. The ADRC–N reserves the right to invite any applicants for a contractor interview, accept, or reject any proposal.

## **E. Notice of Non-Approval**

Each respondent to the RFP shall receive written notice selection or non-selection of the proposal.

After notification of the award is made, copies of all proposals will be available for public inspection from 8:00 a.m. to 4:00 p.m. Monday through Friday for one week following the award at each of the county Human or Health and Human Services Departments.

## **F. Appeal Process**

Contractors can only appeal violations of procedures outlined in the RFP or in the selection process. Subjective interpretations by ADRC–N are not subject to appeal. All appeals must be made in writing and must fully identify the procedural issue(s) being contested.

The written appeal, fully documenting the basis for the appeal, must be filed with the ADRC–N representative:

Elizabeth Skulan  
Bayfield County Department of Human Services  
P.O. Box 100  
117 East Fifth Street  
Washburn WI 54891

## **G. Public Information**

It is the intention of the ADRC–N to maintain an open and public process in the submission, review and approval of the RFP. No proposal submitted may be marked confidential, and any materials so marked, by being included in the application, will be considered public information.

## **J. Incurring Costs**

The ADRC–N is not liable for any costs incurred by individuals or agencies responding to this RFP. ADRC–N reserves the right to accept or reject any or all proposals and to waive technicalities in any proposal or part thereof deemed to be in the best interest of the ADRC–N. Start-up costs and the cost of office equipment, furniture or supplies needed to prepare to perform contract deliverables are not reimbursable.

## **II. Nature of Contract/Service Required**

### **A. Scope of Work**

To provide leadership and oversight of the regional functions of the Aging and Disability Resource Center of the North (ADRC-N). To assure continuity and consistency of ADRC functions within each branch office and Tribe in the region. This contract position works at the pleasure of the ADRC-N Governing board and at the direction and in partnership with the ADRC – N Management Team and the ADRC– N Fiscal Agent in performing the following duties:

1. Provide regional leadership and coordination support to the ADRC–N Governing Board, Management Team, and Fiscal Agent.
2. Provide administrative leadership and monitoring of ADRC–N regional programs, activities, and services provided or managed by the ADRC–N and its branch offices to ensure compliance and continuity as defined in the ADRC–N State Contract.
3. Work in conjunction with the ADRC–N Governing Board, Management Team and Fiscal Agent to oversee and approve the purchasing, monitoring, and evaluation of regional contracted services within the ADRC–N branch offices. Oversee management of memoranda of understanding.
4. Direct the applications for and administration of grant funded services. Identify ADRC-N supplemental funding streams and work with the Management Team, Governing Board and Fiscal Agent to access said funding.
5. Develop, implement, and maintain comprehensive policies and procedures regarding the ADRC-N services and programs in coordination with the Management Team.
6. Establish and maintain effective working and public relations with representatives of federal, state, and local government, community officials, service providers, peers, and the general public at the direction of and on behalf of the Management Team and Government Board.

7. Attend state ADRC Director meetings, represent the ADRC-N and disseminate information from the meetings to all ADRC-N branch offices, successfully perform all regional ADRC Director scope of duties.
8. Interpret and assure implementation of federal, state, and local government laws and regulations as they relate to the provision of programs and services to the target groups served. Work in conjunction with the Management Team to monitor federal and state administrative policies and legislative initiatives for impact on the ADRC-N branch services and programs.
9. Advise and make recommendations to the ADRC-N Governing Board, ADRC-N Management Team, County Boards and various committees and commissions on issues pertaining to programs and services provided by the ADRC-N and its branch offices.
10. Plan, organize, and effectively present and promote ideas and concepts to various boards, committees, departments, employees, news media and the public in both oral and written form. Establish and maintain regional ADRC-N Website. Coordinate all public relations and marketing efforts for the ADRC-N and act as a media spokesperson for the organization and its branch offices.
11. Support the ADRC-N Governing Board in their role as liaison and advocate for the populations served by the ADRC-N.
12. Direct, complete, or assist in the compilation and submission of required fiscal and operational reports.
13. Act as the lead on ADRC-N regional database, resource directory, telephone and all IT related duties and reporting requirements.
14. Provide direction in identifying gaps in services, facilities, and funding and work with the ADRC-N Governing Board and Management Team to address the gaps.
15. Perform other work as directed by the ADRC-N Governing Board or Management Team.

## **B. Expectations**

1. Successfully perform all contract services required in A. above.
2. Meet the physical demands of: working in an office; using oral communication; hearing; vision; computer keyboarding; reading; writing. Handle papers and manuals; lift files, paper, office materials. Sits, stands, bends and reaches intermittently throughout the day. Travel to ADRC-N branch offices; attend or present at community meetings and events; attend county board meetings or their related committees and attend to other out of office meetings.
3. Education and experience commensurate with the skills required of an ADRC Coordinator which includes: Bachelor's degree, preferable in health or human services related field; five years of work experience with disabled and/or elderly clients preferred; and a minimum of three years of work experience in a managerial capacity or project management.
4. Minimum of one year working directly with target populations.
5. Background in administrative, managerial and supervisory principles and practice including budgeting, fiscal management, resource development planning, staff development, and program management and evaluation.
6. Background in programs and needs of older adults and disabled adults, and of the methods and practices for delivery of services to the target populations.
7. Knowledge of modern office procedures and standards of computer programs and data processing systems of local and state resources for all target populations. Skills in calculating, computer data entry, organizing, and planning. Ability to proficiently use a computer and software programs to compile accurate, current and complete reports, records, agreements and budgets. Must possess strong skills in using Microsoft programs such as Word and Excel.
8. Ability to work on several complex projects simultaneously within time constraints.

9. Ability to successfully negotiate with vendors and problem solve on regional systems (e.g. IT systems, telephones systems, website, etc.)
10. Ability to plan; notice; develop meeting packets; and facilitate ADRC-N Supervisor; Management Team; and Governing Board meetings in an efficient and timely manner.
11. Has access to home office; accessible and responsive within one working day of requests; reliable transportation; valid Driver's License; good driving record; proof of automobile insurance; proof of professional liability insurance.
12. Adheres to professional standards and maintain confidentiality.
13. The contract is for no less than 20 regularly scheduled hours per week and flexible hours thereafter until the work is complete.
14. Attends to oversight and everyday business functioning of the regional ADRC-N in an accurate, timely, and efficient manner.
15. Responds to requests for technical assistance, data or information within one business day.
16. Successfully pass a criminal background check as provided in the Wisconsin State Statutes for this position.
17. Vendor is an independent contractor and must have business liability insurance; meet federal civil rights requirements; and any other requirements of a vendor who receives state and federal funding.

### **C. Required Outcomes**

1. Ensures that the ADRC-N meets all obligations under the State contract.
2. Completes all required regional reporting to the state (annual plan, annual narratives, encounter reporting, etc.) in a timely and accurate manner.
3. ADRC-N website is maintained and updated in a timely manner.
4. Ensures consistency, quality, effectiveness and aligns with the state's mission for the ADRC in local ADRC-N local branch offices and regional operations.
5. Annually develops and implements a comprehensive regional marketing and outreach plan.
6. Ensures adherence of local and regional policies and practice to standards, rules, regulations and reporting requirements.
7. Ensures effective communications with: the ADRC-N Supervisors, Management Team, Governing Board; services providers; the Bureau of Aging and Disability Resources (BADR); staff and other agencies as needed.
8. Successfully negotiates and oversees performance of subcontractors.
9. Plans, provides, and/or facilitates regional and local training in an efficient and timely manner.
10. Demonstrates knowledge of effective strategies and best practice and share knowledge regionally in an efficient and timely manner.
11. Measures and monitors quality of service on an ongoing basis locally and regionally. Provides reports to the ADRC-N Management Team, Governing Board.
12. Supervises, manages, and evaluates regional contracted positions.
13. Shares authority to oversee personnel decisions of ADRC-N staff and provides direct input to hire and terminate ADRC-N staff employed by counties.
14. Works with Fiscal Agent to develop, implements, and monitors annual budget; report to ADRC-N Management Team and Governing Board.
15. Provides new ADRC-N board and director orientation; develops board packets; notices public meetings; distributes materials; facilitates meetings and acts as recording secretary.
16. Assists ADRC-N Governing Board to carry out its duties.
17. Seeks and is responsive to input from ADRC-N customers and Governing Board.

18. Maintains, updates, and submits client and fiscal records as requested and required on a timely basis.
19. Identifies, applies for, and pursues additional sources of funding as needed/appropriate.
20. Reviews, approves, and processes regional expenditures in a timely manner.
21. Submits an invoice at the end of each month for 1/12<sup>th</sup> of the annual contract plus any business mileage and/or expenses prior authorized in the regional budget up to limits (per mile, per meal, etc.) identified by the Fiscal Agent; and a list of the activities performed that month.

#### **D. Contract Remuneration**

1. \$45,000 annually; \$3,750 per month
2. Mileage for required travel reimbursed at the reimbursement rate determined annually by the County policies of the Fiscal Agent
3. Meal reimbursement, requires receipts and must follow guidelines in the County of the Fiscal Agent

### **III. PROPOSAL DOCUMENT INSTRUCTIONS:**

#### **A. General Requirements**

Proposals shall include the following:

1. Title page, including name, address, phone number and e-mail address
2. A cover letter, including a brief statement of vendor's understanding of work to be performed, a commitment to perform the work, and a statement as to why the vendor believes it to be the most qualified to perform the services.
3. Documentation demonstrating: how the vendor meets the qualifications of the proposal; any experience or history working on similar projects; and a straightforward concise description of the vendor's capabilities to satisfy the requirements in the request for proposal.

### **IV. Special Provisions**

#### **A. Prerogatives**

1. ADRC reserves the right to reject any or all proposals.
2. To terminate the contract following 60 days written notification.

#### **B. Contract Period**

The Contract is from October 15, 2019 to December 31, 2020. It is renewable annually on calendar year basis if acceptable to both parties thereafter.