

**The Rhode Island Chapter of the Alzheimer's
Association, the Division of Elderly Affairs, and the
Long Term Care Coordinating Council**

REQUEST FOR PROPOSALS

**Consultant for Revision of
Rhode Island State Plan on Alzheimer's Disease and
Related Disorders**

Rhode Island State Plan on Alzheimer's Disease and Related Disorders Overview

The process to develop the Rhode Island State Plan for Alzheimer's disease and Related Disorders began in the spring of 2012 as a collaborative effort between the Rhode Island chapter of the Alzheimer's Association, the Division of Elderly Affairs and the Lieutenant Governor's office through the Long Term Care Coordinating Council (the "Work Group"). The work officially began upon passage by the Rhode Island General Assembly of a Joint Resolution directing the Long Term Care Coordinating Council to serve as the organizational structure for a Work Group to lead the process. The initial report was shared in draft form with stakeholders all over the State of Rhode Island, and finalized in 2013.

The Long Term Care Coordinating Council Alzheimer's Executive Board began discussing an update to the Rhode Island State Plan on Alzheimer's Disease and Related Disorders ("State Plan") in 2017. However, no State of Rhode Island funds were available for professional assistance of the update. Through the efforts of the Rhode Island Office of the Lieutenant Governor, non-profit grant funds were identified from Tufts Health Foundation and the RI Foundation, and State Plan partners Alzheimer's Association of Rhode Island, agreed to serve as a fiscal agent for the grant to acquire professional assistance with a Five-Year Update to the State Plan (the "State Plan Revision").

Through the update of the State of Rhode Island Alzheimer's Five-Year Plan, the Work Group can continue to tackle Alzheimer's not only as an aging issue, but also as a public health crisis. The State Plan is a comprehensive blueprint for how Rhode Island will continue to address the growing Alzheimer's crisis. It creates the infrastructure and accountability necessary to build dementia-capable programs and services for the growing number of Americans with the disease. This state plan is a written report updated by a group of interested parties, sanctioned by the state government, that explores the current impact of Alzheimer's disease in Rhode Island and outlines what steps the state must take to improve its services for people with Alzheimer's and their families. With an update to this Plan we will work to translate the vision of the Plan into actual public policy.

The Work Group will hire a research consultant to revise and update the State of Rhode Island Alzheimer's Five-Year plan, as the plan is due for review, having been produced over 4 years ago. With the rapidly growing and changing extent of the Alzheimer's crisis, it is essential that state plans become living documents that states and stakeholders regularly consult and re-evaluate.

It is time for Rhode Island to review and update the plan so that all Rhode Islanders can benefit from the most up-to-date and comprehensive information on this disease. As this illness touches the lives of so many throughout the region, our state would like to lead with data that is obtained from caregivers and patients, to reflect the real- life implications that Alzheimer's has on patients and families.

The goal of this Request for Proposal (the “RFP”) is to receive proposals to ultimately hire a research consultant with experience in data collection, research and interviewing of medical professionals and production of an effective compilation that can be readily used by stakeholders.

The consultant will be engaged to provide complete documentation, with a start date of **April 3, 2018** and completion by **October 31, 2018**. Finalized hours and time needed to manage this update and implementation will be determined once we have reviewed applications from the RFP process and engage a professional to complete the project. Funds available for the project are limited to grant funding given to the Alzheimer’s Association for this project.

The research consultant hired will work with interested parties to explore where Rhode Island stands with the current impact of Alzheimer's disease and outline additional steps needed over the next five years to improve its services for and support to people with Alzheimer's and their families.

The research consultant will be responsible for attending meetings of the Long Term Care Coordinating Council’s Alzheimer's Disease Executive Committee (the “Executive Committee”) to support revision of the State Plan. The method of documentation and development will be part of a greater process that will include collaboration among many state, public and private agencies, nursing homes, assisted living, caregivers that deal with issues related to aging in community, Alzheimer's for seniors, and senior care.

The consultant will be responsible for using researched-based evidence to support claims and demonstrate what programs and initiatives have worked elsewhere. There is immense value in having many agencies consolidate ideas and best practices, to design a comprehensive and complete approach to understanding and caring for Alzheimer's patients throughout the state.

The opportunity to revise the current State Plan will provide an open dialogue and innovative ideas that can be implemented into a living document that will be used as a guideline to treating Alzheimer's and related diseases. It will include state-wide focus group input, meetings with physicians, members of the Long- Term Care Coordinating Council and inclusion of more pertinent and relevant medical information in the field of Alzheimer's research and treatment.

After completion, legislation will be sought and regulations implemented to carry out the recommendations of the plan to ensure that it is more than just a document - that it comes to describe the reality of the state's public policies on Alzheimer's. The implementation of the State Plan's recommendations is reviewed annually and an update is provided on what has been accomplished and what needs to be done. Prior recommendations and data outcomes will be compared to the State Plan Revision upon completion.

In addition, a post survey of all participants must be drafted to determine the efficacy of the project. The brief survey will include questions on the process of obtaining information and the method with which the consultant conducted interviews of stake holders. The post-process survey will allow for evaluation of techniques, as well as the skill set of the consultant. It will allow for continued participation and involvement through feedback that can be used in the future.

I.

BID / SOLICITATION INFORMATION

- A. Pre-Bid/Proposal Conference: **March 14, 2018**
- B. Requests for Further Information Deadline: **March 30, 2018**
- C. Requests for information or clarification must be made electronically to the attention of:
Craig Dwyer Craig.Dwyer@ltgov.ri.gov or 401-222-2371

Please reference the RFP for Consultant for Revision of Rhode Island State Plan on Alzheimer's Disease and Related Disorders.

- D. RFP Submission Deadline: **April 2, 2018 by 4:00 PM**
Late submittals will not be considered.

Proposals must be mailed or hand-delivered in a sealed envelope marked with the RFP Project Name to:

Office of LT. Governor, c/o Craig Dwyer, 82 Smith St. Providence, RI 02903

- E. Bid Opening: **April 3, 2018- 10 AM**
Bid opening will take place in room 116, RI State House
- F. Award: **April 6, 2018**
- G. Miscellaneous:

The Work Group reserves the right to reject any or all proposals, in whole and in part, received in response to this RFP at any time at the Work Group's sole discretion. Issuance of this RFP in no way constitutes a commitment by the Work Group to award a contract.

This RFP is designed to provide responding firms ("Respondents") with the information necessary to prepare a competitive proposal. This RFP process is for the Work Group's benefit and is intended to provide the Work Group with competitive information to assist in the selection of a vendor to provide services, if the Work Group so chooses.

Each Respondent is responsible for determining all factors necessary for submission of a comprehensive proposal. The costs of preparation and delivery of the proposal are solely the responsibility of the Respondent.

II. INSTRUCTIONS AND NOTIFICATIONS TO RESPONDENTS

It is the Respondent's responsibility to examine all specifications and conditions thoroughly, and comply fully with specifications and all attached terms and conditions. Respondents must comply with all Federal, State, and local laws, ordinances and regulations, and meet any and all registration requirements where required for contractors as set forth by the State of Rhode Island. Failure to make a complete submission as described herein may result in a rejection of the proposal.

All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the Respondent. The Working Group nor any of its members assumes no responsibility for these costs.

A submittal may be withdrawn by written request to the contact person listed in Section 1 above, by the proposer prior to the stated RFP deadline.

Prior to the proposal deadline established for this RFP, changes may be made to a proposal already received by the Town if that vendor makes a request to the contact person listed in Section 1 above, in writing, to do so. No changes to a proposal shall be made after the RFP deadline.

Proposals are considered to be irrevocable for a period of not less than ninety (90) days following the opening date, and may not be withdrawn, except with the express written permission of the Working Group. Should any vendor object to this condition, the vendor must provide objection through a question and/or complaint to the contact person listed in Section 1 above, prior to the proposal deadline.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein. The Respondent has full responsibility to ensure that the proposal arrives prior to the deadline set out herein. The Working Group assumes no responsibility for delays caused by the U.S. Postal Service or any other delivery service. Postmarking by the due date will not substitute for actual receipt of response by the due date. Proposals arriving after the deadline may be returned, unopened, to the Respondent, or may simply be declared non-responsive and not subject to evaluation, at the sole discretion of the Working Group.

It is intended that an award pursuant to this Request will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered, but subcontracts are permitted, provided that their use is clearly indicated in the Respondent's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

Respondents are advised that all materials submitted to the Working Group for consideration in response to this RFP shall be considered to be public records as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and may be released for inspection immediately upon request once an award has been made.

Respondents are responsible for errors and omissions in their proposals. No such error or omission shall diminish the Respondent's obligations to the Working Group.

The Working Group reserves the right to reject any or all proposals, or portions thereof, at any time, with no penalty. The Working Group also has the right to waive immaterial defects and minor irregularities in any submitted proposal at its sole discretion. All material submitted in response to this RFP shall become the property of the Working Group upon delivery.

III. SCOPE OF WORK

A. General Conditions

The Respondent shall comply with all applicable federal, state and local laws, rules, regulations, ordinances and codes and obtain any licenses or permits required to provide the services under this RFP. All requirements for the primary contractor shall also apply to any and all subcontractors. It is the Respondents responsibility to insure the compliance by the subcontractors. Regardless of subcontracting, the Respondent remains liable to the Working Group for the performance under this RFP or any resulting contract.

B. Background

The current State Plan is provided, attached to this RFP as Exhibit A. The Working Group proposes the State Plan Revisions to current State Plan. The final State Plan Revisions will be presented to the Work Group.

C. Services Provided:

- The contractor will be responsible to review, revise and update the existing Rhode Island State Plan on Alzheimer's and Related Disorders. The consultant will be responsible for using research-based evidence to support claims and demonstrate what programs and initiatives have been successful in other states. The method of documentation and development will be part of a greater process as outlined below. As part of this process the contractor will:
 - Coordinate meetings of the Long-Term Care Coordinating Council's Executive Committee on Alzheimer's Disease;
 - Coordinate state wide focus groups to gather public input on best practices and gaps in services;
 - Meet with stakeholders, physicians, Institutions of higher education, public and private agencies, caregivers and other interested parties to inform of the state plan.
 - Compile and analyze data collected that will inform the design of a comprehensive and complete approach to understanding and caring for Alzheimer's patients throughout the state.
 - Draft a post survey of all participants to determine the efficacy of the project.
 - Present the final document to the Long Term Care Coordinating Council's Executive Committee on Alzheimer's Disease.

D. Availability

The successful Respondent will need to review the current plan and compile data to substantiate any changes or modifications, through a combination of data collected by holding Community Forums in each of the five Rhode Island counties, engage stakeholders with a comprehensive review of current plan, hold at least five focus groups in each of the five RI Counties, locations to be determined with assistance by the Work Group. The consultant shall provide no less than a monthly status report, and attend Alzheimer's Executive Board Meetings. Office and equipment will be made available at the Alzheimer's Association of R.I. on Waterman Street, Providence, R.I.

A post survey must be provided to determine the efficacy of the project. Results to be submitted to the Work Group.

IV. QUALIFICATIONS AND EXPERIENCE OF RESPONDENTS

A. Business Organization and experience in service delivery

Respondent must have any licenses needed in the HR field if required.

B. Qualifications and Relative Experience

Minimum of five years' experience in the field of human services, policy and research and experience and knowledge in the field of Alzheimer's disease and other related dementias. Respondent should provide documentation that he/she has experience in the field as follows as required for the data collection:

1. Program Planning
2. Experience with writing state plans within the past five years
3. Academic Credentials – Bachelors Degree
4. Excellent writing and communication skills

A. EVALUATION AND AWARD

A. Evaluation

All responses are to be evaluated based on whose response is the most advantageous to the Work Group, price and other factors considered, and whose response will provide the highest quality of service at fair and competitive prices.

The Work Group will use a one **hundred (100) point** system in evaluating all proposals. The criteria to be evaluated are identified below:

Category	Value Points
Technical Criteria	
Description of Services	30
Management Criteria	
Business Organization	10
Qualifications; Relevant Experience	30
Cost Criteria	
Fee Proposal	30

TOTAL **100** _____

B. Contract Period

The term of contract shall be from **April 3, 2018** through **November 30, 2018**

C. Fee Schedule/Cost Proposal

Respondents shall disclose all fees intended to be charged and all other terms and conditions that may result in a charge to the Work Group. Respondents are forbidden from taking other compensation of any kind for the work awarded under this RFP, including but not limited to selling data developed for providing this work.

B. INSURANCE

Respondent shall maintain and keep in force such comprehensive general liability insurance as shall protect them from claims which may arise from operations under any contract entered into that may be awarded from this RFP, whether such operations be by themselves or by anyone directly or indirectly employed by them.

The amounts of insurance shall be not less than \$1,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death. The Alzheimer’s Association of Rhode Island shall be named as additional insured on the vendor's General Liability Policy.

The vendor shall maintain and keep in force such Workers' compensation insurance limits as required by the statutes of the State of Rhode Island, and Employer's Liability with limits no less than \$500,000.

C. ACKNOWLEDGMENT OF RISK AND HOLD HARMLESS

In addition to the Terms and Conditions of Purchase in any agreement that may result from this RFP, and to the fullest extent permitted by law, the Respondent, its officers, agents, servants, employees, parents, subsidiaries, partners, officers, directors, attorneys, insurers, and/or affiliates (Releasers) agree to release, waive, discharge and covenant not to sue the Work Group, its members, officers, agents, servants or employees (Releases) from any and all liability, claims, cross-claims, rights in law or in equity, agreements, promises demands, actions and causes of action whatsoever arising out of or related to any loss, damage, expenses (including without limitation, all legal fees, expenses, interest and penalties) or injury (including death), of any type, kind or nature whatsoever, whether based in contract, tort, warranty, or other legal, statutory, or equitable theory of recovery, which relate to or arise out of the Releasers use of or presence in and/or on Work Group property.

The Releasers agree to defend, indemnify and hold harmless the Releases from (a) any and all claims, loss, liability, damages or costs by any person, firm, corporation or other entity claiming by, through or under Releasers in any way whatsoever, including all subrogation claims and/or claims for reimbursement, including any court costs and attorney fees, that may incur due to Releasers use of or presence in and on Work Group property; and (b) any and all legal actions, including third-party actions, cross-actions, and/or claims for contribution and/or indemnity with respect to any claims by any other persons, entities, parties, which relate to or arise out of Releasers use of or presence in and on work Group property.

The Releasers acknowledge the risks that may be involved and hazards connected with use of or presence in and on Work Group property but elect to provide services under any contract with full knowledge of such risks. Releasers also acknowledge that any loss, damage, and/or injury sustained by Releasers is not covered by Releases insurance. Releasers agree to become fully aware of any safety risks involved with the performance of services under any contract resulting from this RFP and any safety precautions that need to be followed and agree to take all such precautions.

The duty to indemnify and/or hold harmless the Work Group shall not be limited by the insurance required under this RFP

D. PROPOSAL CONTENT AND ORGANIZATION

Submission of a proposal is acknowledgement and acceptance of the Terms and Conditions of this RFP. Respondents also acknowledge that they fully understand the scope of service, work and activity to be performed.

1. Proposal Submittal Binding Method: Respondent shall bind the proposal such that the Work Group can, if needed, remove the binding (i.e. “comb-type, etc.) or remove the pages from the cover (i.e. 3-ring binder, etc.) to make copies then return the proposal submittal to its original condition.

2. Form of Proposal: The proposal shall be submitted in the following manner. Failure to submit the proposal in the manner specified may result in the elimination of that proposer from consideration for award.
3. Tabbed Proposal Submittal: So that the Work Group can properly evaluate the proposals received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted below. Each category must be separated by index dividers and the index divider must extend so that each tab can be located without opening the proposal and labeled with the corresponding tab reference number noted below.

A. Tab 1- Fee Schedule

All Fee Schedules must be signed and submitted as a firm offer consistent with the terms of this RFP. Included in this tab must be a fee schedule, and pricing must include all fees charged and costs as specified in this solicitation. Any fees or costs not submitted will not be part of a resulting contract.

B. Tab 2 – Qualification and Experience

Please include copies of all applicable licensing required to perform the work requested in this RFP Section IV.

C. Tab 3 – Technical Criteria

Please list all services to be rendered with an explanation on how you will provide the services listed under Section III of this RFP, and any services necessary to carry out those listed under Section III of this RFP. Respondents shall also provide evidence of how services of similar type were provided to other organizations. Respondents are to provide evidence of any innovation and/or successful approach in providing the services requested, along with any other suggestions for carrying out the work contemplated herein.

D. Tab 4 – Organization

Please outline your business organization, including, but not limited to:

Name, address and other related information, website address, organizational chart, resumes of key people who will be working with the Work Group, and other information that may be helpful to the Work Group in understanding Respondents organization that it proposes will provide services.

E. Tab 5 – Additional Qualifications

Respondents shall submit documentation highlighting qualifications and experience they have that will assist the Work Group in the evaluation and selection process. Such documentation shall include, but not be limited to:

- a. Letters of recommendation;
- b. List of any judgments within the last three (3) years and/or a list of bankruptcy within the last ten (10) years;
- c. Availability of personnel, facilities, equipment and other resources to provide the services requested; and

- d. Any other information concerning the organization and/or individuals of the organization that would assist the Work Group in the evaluation process.

F. Tab 6 - Joint Venture/Partnerships

Respondent shall identify if this bid is a joint venture or partnership with another entity. Please remember that all information required from the Respondent under the proceeding or subsequent tabs must also be included for any joint venture or partner.

One entity must be designated as the primary contact for the joint venture or partnership in the bid.

If no joint venture or partnership exists or will not be utilized, please provide this statement, "NO JOINT VENTURE/ NO PARTNERS".

G. Tab 7 - Other Information

The proposer may also include hereunder any other general information that the proposer believes is appropriate to assist the Work Group in its evaluation.

Also, please state any and all additions, deletions, and exceptions, if any, that you are taking to any portion of this proposal. If not addressed specifically, the Work Group assumes that Respondent will adhere to all terms and conditions listed in this RFP.

E. ADDITIONAL TERMS AND CONDITIONS

A. Evaluation

The evaluation of proposals will be conducted in a time frame convenient to the Work Group.

This proposal will be reviewed for the lowest qualified evaluated bid price per the criteria set forth in this RFP. The Work Group reserves the right to accept or reject any or all proposals, and to otherwise act in its best interest including, but not limited to, directly negotiating with any firm who submits a proposal in response to this RFP and to award a contract based upon the results of those negotiations alone. Further, the Work Group reserves the right to waive irregularities it may deem minor in its consideration of proposals.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The Work Group may elect to require presentations(s) by Respondents in consideration for award.

All responses are to be evaluated on the basis of whose response is the most advantageous to the Work Group, price and other factors considered, and whose response will provide the highest quality of service at fair and competitive prices. Proposals will be evaluated in three (3) phases:

The first phase is an initial review to determine if the proposal, as submitted, is complete. To be complete, a proposal must meet all the requirements of this RFP.

The second phase is an in-depth analysis and review based on criteria below and their associated weights listed in Section V above.

The third, if necessary, is a meeting and presentation on any finalist's proposal that the Work Group deems necessary.

B. Communication

All communication between the Work Group and any Respondent pertaining to this RFP, any award, or contract shall be accomplished in writing.

Respondent is required to furnish and deliver at the prices and in accordance with the conditions of any proposal proposal and detailed specifications provided in a proposal. The contents of a submitted proposal shall be incorporated by reference into any contract awarded as a result of this RFP.

No alterations or variations of the proposal shall be valid or binding upon the Work Group unless submitted in writing and accepted by the Work Group in writing.

Payments under any contract resulting from this RFP are subject to the availability of funds.

C. Subcontracts

No subcontracts or collateral agreements shall be permitted, except with the Work Group's express written consent.

D. Pricing

All pricing offered or extended by a Respondent is considered to be firm and fixed unless expressly provided for to the contrary.

Respondent warrants that they have not paid, and agrees not to pay, any bonus, commission, fee, or gratuity to any employee or official of the Work Group for the purpose of obtaining any contract or award issued as a result of this RFP. Respondent further warrants that no commission or other payment has been or will be received from or paid to any third party contingent on the award of any contract resulting from this RFP.

E. Payment

No member of the Work Group, other than the designated fiscal sponsor, shall be responsible for payment of fees to any Respondent as a result of this RFP. Any payment obligation under a contract resulting from this RFP shall be limited to the designated fiscal sponsor and the funds available and identified for these services.