



*Delaware Health  
And Social Services*

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**DIVISION OF MANAGEMENT SERVICES**

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PROCUREMENT

DATE: February 28, 2014

HSS 14-011

Money Management Program Services

for

Division of Services for Aging & Adults with Physical Disabilities

Date Due: March 31, 2014

By 11:00 am Local Time

ADDENDUM # 1 – Questions & Answers

**PLEASE NOTE:**

THE ATTACHED SHEETS HEREBY BECOME A PART OF THE ABOVE MENTIONED RFP.

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Kieran Mohammed  
Procurement Administrator

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Franklin Jones  
Division Contact

Money Management Program Services – RFP HSS-14-011  
Questions & Answers

Question #1: On page 2 of the RFP it indicates sealed proposals are to be received by:

Delaware Health and Social Services  
Herman M. Holloway Sr. Campus  
Procurement Branch  
Main Administration Bldg, Sullivan Street  
Second Floor, Room #257  
1901 North DuPont Highway,  
New Castle, Delaware 19720

Then later on Page 10 the RFP indicate to submit proposal responses to:

Kieran Mohammed  
Division of Management Services  
Delaware Health and Social Services  
Main Administration Building, Sullivan Street  
Second Floor, Room 257  
1901 North duPont Highway  
New Castle, DE 19720

Is one address listing preferred or will either be accepted?

Answer: [Either address is fine as long as it contains room 257.](#)

Question #2: On page 4 it references the availability of funds. What is the total dollar amount of funding available for the first year of this contract 7-1-14 through 06-30-15 for Money management services for the entire state?

Answer: [Currently, DSAAPD has not set the total amount planned for the contract. DSAAPD is planning to serve approximately 55+ persons in the first year of this contract and the total amount will be determined by the rates proposed in the received bids.](#)

Question #3: The budget workbook Instructions on page 15 indicate several different areas of funding streams section 1.8. What are all the sources of funding for this program? How much is available from each source?

Answer: [This service will be funded totally through STATE funds. Currently, there is no determined amount of funding dedicated to the program, per Question #2.](#)

Question #4: Do any of the funding sources require a Match?

Answer: [No](#)

Question #5: The Service Specifications indicate that provider must comply with DSAAPD Quality Assurance initiatives related to this program. Please provide the Quality Assurance initiatives related to this program and the measurements or target outcomes by which the provider will be evaluated.

Answer: [Our intention is to follow the AARP guidelines for Quality Assurance on a provider.](#)

Question #6: What % of clients served under this Money Management program statewide require each described service component as outlined in the service specifications section 7.1:

- How many require 7.1.1 Bill paying services to help the consumer keep his/her finances in order by providing support in managing a budget and writing checks for the consumer to sign?  
Answer: We currently have, at any given time, about 35-40 clients utilizing bill paying.
- How many require just 7.1.2 Representative payee services provide assistance to consumers who are no longer able to manage their finances on their own- which require appointment by a government agency such as the Social Security Administration?  
Answer: About 10
- Please confirm all clients require 7.1.3 Monthly reconciliation of consumer accounts for oversight and consumer protection purposes?  
Answer: Yes

Question #7: Does DSAAPD require all those who propose services to be recognized by the Social Security Administration as an Organizational Payee or have staff who are Representative Payees as criteria to provide Representative Payee services outlined in 7.1.2 of the service specifications

Answer: Yes, they will have to apply for appointment by the Social Security Administration (or other government agency, if applicable) to manage the monthly benefits the consumer receives. According to the SSA; "When friends or family are not able to serve as payees, Social Security looks for qualified organizations to be representative payees." More information is available on the Social Security Website for applying to become an organizational rep payee. <http://www.ssa.gov/payee/index.htm>

Question #8: Who does DSAAPD currently contract with to provide for Money Management services?

Answer: This has been an AARP Foundation volunteer program operated through the state as a sponsoring agency.

Question #9: Is the current vendor(s) using a volunteer model or an Employee model or a combination?

Answer: This has been an AARP Foundation volunteer program operated through the state as a sponsoring agency.

Question #10: What is the current per month per consumer charge DSAAPD is contracted to pay for Money Management services?

Answer: There is no contract as this has been a volunteer program operated for AARP through the state as the sponsoring agency. Volunteers are reimbursed for mileage.

Question #11: How many clients will be served during per year under this contract?

Answer: 50-60 persons are expected to be served in the first contract year with the potential for the contractor to "grow" the program.

Question #12: Will multiple awards be made to multiple vendors on this contract?

Answer: DSAAPD is planning to offer statewide coverage for the Money Management Program Service, so if multiple vendors are needed to supply statewide coverage, then DSAAPD would choose accordingly.

Question #13: How many clients will each vendor have per month?

Answer: That would be determined by the amount of vendors chosen. Bidders should focus on their proposed costs per client figuring a volume of approximately 50 clients.

Question #14: We don't understand the monthly unit "one client/month"? What does this mean? Is it one month of fulltime work? Is it one month of part time work? Does this mean that the vendor will be allowed to provide one month of work per client? Is this one month of 30 consecutive days of services, or one month (30 days) of time spread out over a year, or over SOME defined period of time? Please explain.

Answer: All money management services performed for one client for one month is the unit. It is up to the vendor to determine how much time is needed to be spent for each client, on average.

Question #15: Who were the incumbents, and what were their contract dollar amounts? What were they paid per Unit?

Answer: Please refer to the answers for Questions #8, #9, & #10.

Question #16: Are matching funds required?

Answer: No

Question #17: IS DSAAPD providing in-service to volunteers?

Answer: Yes

Question #18: What does orientation consist of?

Answer: DSAAPD currently uses the AARP model.

Question #19: Where is the concentration of current clients?

Answer: Currently, most clients are located in New Castle County.

Question #20: Should vendors budget marketing dollars for this program in the attempt to "grow" the program?

Answer: No, DSAAPD will refer clients to this program.

Question #21: How does DSAAPD recruit volunteers?

Answer: Through referrals from the DSAAPD ADRC, word of mouth, and has had AARP provide assistance with volunteers in the past, however AARP will be pulling from the program.

Question #22: Does DSAAPD provide orientation to volunteers?

Answer: Yes