

REQUEST FOR PROPOSAL (RFP)

For:

The Wisconsin Disability Benefits Network (WDBN)

RFP # 1598DLRC-LS

Issued by:

**STATE OF WISCONSIN
DEPARTMENT OF HEALTH and FAMILY SERVICES, DIVISION
OF LONG TERM CARE, BUREAU of AGING and DISABILITY
RESOURCES,
OFFICE OF INDEPENDENCE and EMPLOYMENT**

**Proposals must be submitted
no later than October 5th, 2007 3 PM CST**

**For further information regarding this
RFP contact Sarah Lincoln at (608) 266-7974 or lincosj@dhfs.state.wi.us.**

LATE PROPOSALS WILL BE REJECTED

TIMELINE FOR RFP
Wisconsin Disability Benefits Network

08/10/07	Anticipated mailing date of RFP
09/02/07	Notice of Intent to submit a proposal deadline
10/05/07	Due date for Applications/Proposals (6-8 weeks after mailing)
11/08/07	Final Award Letters mailed
11/09/07 to 11/15/07	Public Inspection of Proposals
11/17/07	Letters of Intent to Protest are due.
11/21/07	Final date for Appeals (10 working days after Award Letters are postmarked)
12/17/07	Division signs Grant
01/01/08	Agreement Start-up Date

PART I

GENERAL INFORMATION

The Wisconsin Disability Benefits Network, or WDBN, is a nationally unique collaboration between benefit counseling professionals and state government. The WDBN has been designed to advance knowledge about the very complex array of disability and age-related public entitlements that support community living and participation, through cash support, health care coverage, and housing and transportation assistance. The WDBN provides benefits training, technical assistance and professional development activities to counseling practitioners; and outreach, information and assistance to consumers of disability and age-related public entitlements.

The WDBN grant is intended to promote quality training for practitioners of benefits counseling and to make available a source of technical assistance to practitioners of disability work incentive-focused benefits counseling. The WDBN will provide a framework of statewide activities that foster networking and collaboration among benefit counseling practitioners. The entity awarded a grant under this RFP will provide critical benefits information to the general public, a wide range of disability and seniors' issues stakeholders, and consumers of disability services and supports. The awardee will also facilitate consumer access to the state's Medicaid Purchase Plan (MAPP) through the Plan's Health and Employment Counseling module (<http://www.dhfs.state.wi.us/WIpathways/HEC.htm>).

1.0 INTRODUCTION AND BACKGROUND

Wisconsin's seniors and people with significant disabilities are eligible for a wide range of public entitlements that are intended to support their health and well being and provide the assistance necessary to maintain their independence. However, the rules that govern these entitlements are many, complex and often work at cross purposes with each other. For many Wisconsin residents, community participation and health status are jeopardized because they do not know how to access, or maintain access to, these entitlements. For some people, the complexity of these rules and the size of the bureaucratic systems inhibit employment and financial security.

The purpose of this Request for Proposal is to provide interested parties with information necessary to prepare and submit a proposal for continued development and ongoing management of the Wisconsin Disability Benefits Network (WDBN). The Division of Long Term Care intends to use the results of this process to award a contract that will maintain the state's high level of access to accurate and timely benefit information through statewide community outreach about relevant and essential benefits, training, technical support and professional development for a growing cadre of benefits counseling practitioners. The awardee will also be asked to participate with the Division in a wide range of public policy and practice initiatives that relate to disability benefits and employment. The organizational capacity to quickly respond with increased staff time or the provision of specialized and on-going consultation for initiatives such as the state's Medicaid Infrastructure Grant (MIG) or other Pathways to Independence activities is important and should be discussed in the proposal, but not added to the submitted budget. For information regarding the MIG and other Pathways projects please visit <http://www.dhfs.state.wi.us/WIpathways/index.htm>.

1.1 AVAILABLE FUNDS

A total of \$450,000 will be available in the initial year of funding under this RFP. Funds awarded under this solicitation will be for the period of January 1, 2008 through December 31, 2008. Based upon satisfactory performance and availability of funds, the successful proposer receiving an award under this RFP may be eligible to apply for additional annual awards, on a year-by-year basis through December 31, 2012. Proposers are advised that should additional state or federal funds become available for innovative expansion and/or enhancement of benefit services the Division may utilize the results of this RFP for an increased award.

1.2 ISSUING AGENCY

This RFP is issued for the State of Wisconsin by the Division of Long Term Care. The Division is the sole point of contact for the State of Wisconsin during the selection process.

1.3 PROJECT GOALS

The goals of the WDBN project are as follows:

1. Through training, technical assistance, data collection and analysis, and other means, increase statewide access to benefit information and assistance that results in accurate and timely program eligibility determinations and increased beneficiary employment outcomes and employment-derived asset accumulation through use of entitlement program “work incentives”.
2. Advance the profession of benefits counseling by a variety of means including development of professional standards that ensure quality benefits information and advisement to consumers and through collaboration with entities such as the National Rehabilitation Association, the Wisconsin Association of Benefits Specialists, and the Social Security Administration’s Work Incentive Planning and Assistance grants, among many others.
3. Support the employment aspirations of people with disabilities by facilitating access to the Medicaid Purchase Plan (MAPP) through its Health and Employment Counseling (HEC) feature.

1.4 PROJECT DESIGN

The Division is soliciting PROPOSERS to continue development and management of the Wisconsin Disability Benefit Network.

The WDBN will assess the need for and provide, in consultation with the Division, statewide training and outreach to people with disabilities, seniors and other stakeholders regarding benefit issues, programs and eligibility policies.

The WDBN serves as the primary training program in Wisconsin for practitioners of an emerging counseling discipline that serves to inform people of the critical elements of disability and age related benefit programs (e.g. Supplemental Security Income, Medicaid, Medicare, etc) that can contribute to their independence, community participation, health care and employment.

The WDBN maintains a three “tiered” training curriculum for presentations to the general public (Tier I), to social service professionals (Tier II) and to fully train benefits counseling practitioners (Tier III). Selected elements of the full curriculum, including instructor’s and student’s manuals, sufficient for the purposes of this solicitation and proposal development, may be obtained as a read only document at <http://www.dhfs.state.wi.us/WIpathways/index.htm> . **This curriculum must be used and maintained as is for all training in the initial grant year unless guidance and written permission are obtained in advance from the Division.**

The WDBN is charged with maintaining the currency and utility of a second curriculum focused on benefits available to children and young adults (under age 18). The Youth Benefits

Curriculum mirrors that previously described for adults. The youth curriculum is also available in read only PDF at <http://www.dhfs.state.wi.us/WIpathways/index.htm> .

Specific Requirements in Year 1:

In the initial award year it is expected that the WDBN will provide, at no cost to participants, 3 courses of the multi-day practitioner level training using existing Tier III Curriculum (provided in full and electronically by the Division to the successful proposer) to an annual total of at least **10** persons seeking Work Incentive Counselor training (full Tier III course), and 10 persons seeking Disability Benefits Specialist training (selected elements of the Tier III course). The WDBN will provide not less than 6 months of technical assistance on the use of the “work incentives” to each of the candidates completing successfully the full Tier III curriculum. Technical Assistance includes review and feedback of a sample of practitioner-drafted consumer benefits analyses and answers to benefits related case questions.

The WDBN will support four quarterly meetings of benefits counseling practitioners for the purposes of mutual support, continuing education and professional development.

In the initial year of the award the Division expects that the WDBN will utilize the existing Tier II Curriculum to provide training to at least four groups of professional stakeholders at no cost. This training is designed to increase the benefits knowledge of professionals that serve persons with disabilities (e.g. state VR staff) or persons who supervise benefits counseling professionals or manage agencies employing benefits counseling professionals (e.g. Aging and Disability Resource Centers, Independent Living Centers).

In the initial year of the award the Division expects that the WDBN will conduct not less than 8 training sessions at no cost to participants using the existing or modified (with Division approval) Tier I Curriculum directed to informing consumers and stakeholders of benefits issues (e.g. orientation to benefits, work incentives, Medicare Part D, etc.). Tier I topics and audiences will be identified in consultation with the Division.

The WDBN will maintain the usefulness and accuracy of the Three Tiered Adult and Youth curricula in electronic format.

The WDBN will develop and distribute a quarterly newsletter of general disability consumer interest and readability, as well containing information useful to disability professionals and benefits counseling practitioners.

The WDBN will maintain a website of similar utility and focus as the newsletter, to include an on-line calendar of relevant events in addition to the WDBN training schedule and the existing WDBN benefit counseling practitioner locator feature.

The WDBN will be expected to maintain toll-free telephone capacity to provide limited benefits information, referrals to service and support programs and to serve as a general resource for consumers wishing to access benefit entitlements or utilize work incentive features.

Finally, through outreach and individually-tailored facilitation activities, the WDBN will assure that persons will become eligible for the Medicaid Purchase Plan (MAPP) through the Health and Employment Counseling program (HEC). Information on the Health and Employment Counseling program is available at <http://www.dhfs.state.wi.us/WIpathways/> . Proposers are not required to replicate the current WDBN-HEC program (<http://www.eri-wi.org/benefitsCounselingInWisconsin.php>) but to propose an effective means to assist approximately 100 consumers annually to enroll in MAPP using the program’s HEC module.

1.5 DEFINITIONS

The following definitions are used through the RFP.

Division For this RFP Division means the Division of Long Term Care.

Bureau For this RFP Bureau means the Bureau of Aging and Disability Resources.

Proposer means an organization submitting a proposal in response to this RFP.

State means the State of Wisconsin.

Grant Recipient means proposer awarded funds for direct benefit of the community.

Proposal means response to RFP.

1.6 WHO MAY SUBMIT A PROPOSAL

Any tribal or county governmental unit, State of Wisconsin executive department, non-profit or not-for-profit organization, for profit organizations, any institution of higher education (state Technical College system members, state University System units or private colleges) in the state of Wisconsin are eligible to apply.

Applicants may be single institutions or organizations as described above, or partnerships of eligible institutions or organizations providing authorized documents (e.g. a fully executed Memorandum of Agreement between all partners) fully describing the nature of the partnership, division of responsibilities, management structure and fiscal processes.

II. GENERAL PROGRAM REQUIREMENTS

The following items are required. These requirements will form part of the contract with the Division awarding these funds. Failure to comply with these requirements can result in disallowances and/or termination of the agreement for funds.

2.0 ACCEPTANCE OF PROPOSAL CONTENT

The recipient of an award will be mandated to meet all requirements of this RFP.

2.1 ALLOWABLE COSTS

The recipient will be required to comply with the Department of Health and Family Services Allowable Cost Policy Manual.

2.2 CAPITAL EQUIPMENT

Funds may be used to purchase capital equipment with prior written approval from the Division. Capital equipment costs are defined as all costs associated with the acquisition of assets having a value in excess of \$5,000, and a useful life in excess of one year. Funds can be used to purchase/rent supplies such as adaptive and communication equipment.

2.3 SALARIES and INDIRECT COSTS

Funding is for the provision of services only. Indirect costs may not exceed 9% of staff salaries and fringe benefits.

2.4 REPORTS

Reports of both programmatic and fiscal activity will be required for the purpose of documenting the satisfactory meeting of project objectives, in accordance with the application. Reporting requirements will be specified in the agreement between the successful proposer and the Division. Failure of the successful proposer to accept these obligations may result in cancellation of the award.

The recipient shall, at the option of the Division, appear before DHFS administrators to clarify findings and to answer any questions at any time during the grant agreement or after the grant agreement is completed.

2.5 NEWS RELEASES

News releases pertaining to this award or any part of the proposal shall not be made without the prior written approval of the Division.

Copies of any news releases regarding this grant during the contract year(s) will be submitted to the Division.

2.6 LEGAL SERVICES

Funds provided under a contract with the Division can be used to provide legal advice to the recipient of the award, but cannot be used to support any legal actions taken against the federal, state, or local governments.

2.7 EMPLOYMENT

The recipient, if not a state agency, will not engage the services of any person or persons now employed by the state, including any department, commission or board thereof, to provide services relating to this agreement without the written consent of the employer of such person or persons and of the Division. If the recipient is a state agency, funds awarded may not supplant existing funds for programs serving seniors or people with disabilities.

2.8 SUBCONTRACTING

If the applicant plans to use subcontractors, this should be clearly explained and costed out separately in the application. However, the primary contractor will be responsible for contract performance whether or not subcontractors are used.

2.9 TERMINATION OF AGREEMENT

The Division may terminate this agreement at any time at its sole discretion by delivering thirty (30) days written notice to the grant recipient. Upon termination, the Division's liability will be limited to the pro rata cost of the services performed as of the date of termination plus expenses incurred within the prior written approval of the Division. In the event that the grant recipient terminates this agreement, for any reason whatsoever, it will refund to the Division within fourteen (14) days of said termination, all payment made hereunder by the Division to the grant recipient for activities not completed. Such termination will require written notice to that effect to be delivered by the grant recipient to the Division not less than thirty (30) days prior to said termination.

2.10 INCURRING COSTS

The State of Wisconsin is not liable for any cost incurred by proposers in replying to this RFP.

2.11 WAIVER OF TECHNICALITIES

The RFP Evaluation Committee reserves the right to accept or reject any or all responses to the RFP and waive minor technicalities. The determination of whether an RFP condition is substantive or a mere technicality shall reside solely with the RFP Evaluation Committee.

2.12 AFFIRMATIVE ACTION

Successful proposers who are awarded contracts of twenty five thousand dollars (\$25,000) or more shall have included in their contracts the following clause:

"A written affirmative action plan is required as a condition for the successful performance of the contract. Excluded from this requirement are grant recipients whose annual work force amount to less than twenty five employees. The affirmative action plan shall be submitted to the state agency within fifteen (15) working days after the award of the contract."

2.13 REASONABLE ACCOMMODATIONS

The Department will provide reasonable accommodations, including the provision of informational material in alternative format, for qualified individuals with disabilities. For special needs contact Sarah Lincoln 608-266-7974 or lincosj@dhfs.state.wi.us.

2.14 NON-DISCRIMINATION AGAINST EMPLOYEES OR APPLICANTS FOR EMPLOYMENT.

In connection with the performance of work under this contract, the grant recipient agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, marital status, physical condition, arrest or conviction record, developmental disability as defined in s. 51.01 (5), sexual orientation or national origin.

This provision shall include, but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Except with respect to sexual orientation, the grant recipient further agrees to take affirmative action to ensure equal employment opportunities.

The recipient agrees to post in conspicuous places, available for employees and applicants for employment, notice to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.

III. CLARIFICATION AND/OR REVISIONS TO SPECIFICATIONS AND REQUIREMENTS NOTICE OF INTENT TO APPLY

3.0 NOTICE OF INTENT (OPTIONAL)

Prospective proposers are requested, but not required, to submit a Notice of Intent to apply to DLTC. The Notice of Intent form should be returned to the Division by 09/02/07 C.D.T. Submittal of the Notice of Intent does not commit an agency to submitting an application. **Any supplemental written information related to this RFP developed by the Division will be provided only to those agencies who have filed a Notice of Intent, or to agencies who request such information.** Notices should be mailed or hand delivered to:

Sarah Lincoln RFP Manager
Division of Long Term Care
Room 951
Madison WI 53707-7851
608-266-7974
or at lincosj@dhfs.state.wi.us

3.1 CLARIFICATION AND/OR REVISIONS TO SPECIFICATIONS AND REQUIREMENTS

Any questions concerning this RFP should be addressed, either in writing or by telephone request, on or before 09/28/07 to:

Sarah Lincoln RFP Manager
Division of Long Term Care
P.O Box 7851
MADISON WI 53707-7851
608-266-7974
or at lincosj@dhfs.state.wi.us

COLLECT CALLS WILL NOT BE ACCEPTED

Proposers are expected to raise any questions, exceptions, or additions they have concerning the RFP DOCUMENT at this point in the RFP process. If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the proposer should notify, immediately, the above named individual of such error and request modification or clarification.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all recipients of this initial RFP.

Each proposal shall stipulate that it is predicated upon the requirements, terms, and conditions of this RFP and any supplements or revisions thereof.

Any contact with State employees concerning this RFP is prohibited, except as authorized by the RFP manager during the period from date of release of the RFP until the notice of intent to contract is released.

IV. SUBMITTAL OF APPLICATION

4.0 All applications must be typed, doubled-spaced and should not exceed 25 pages plus Assurance Form.

4.1 Proposers can submit only one application.

4.2 The proposer must submit five (5) copies of the application to the Division.

4.3 Closing date. The closing date for the receipt of all applications under this solicitation will be **10/05/07**. Applications may be mailed or hand delivered. An application will be accepted and considered received on time if:

a. The application is received by the mail room (address shown below) by 3:00 p.m. C.D.T. on 10/05/07.

Sarah Lincoln, RFP Manager
Division of Long Term Care
1B Mail Room
P.O Box
MADISON WI 53707-7851

b. The application is hand delivered to the Division of Long Term Care (address shown below) by 3:00 p.m. C.D.T. on 10/05/07

Sarah Lincoln, RFP Manager
Division of Long Term Care
1 West Wilson Street Rm. 951
Madison, WI 53707-7851

NO FAXES OR EMAILED PROPOSALS WILL BE ACCEPTED.

Proposers are cautioned to allow sufficient time for delivery by the U.S. Post Office, because it can take several days to receive mail from outlying areas. Proposers are cautioned that receipt of the proposal sent by the United State's Postal Service, the State of Wisconsin mail system or a commercial courier does not constitute receipt of the proposal by the Division for the purposes of this RFP. All proposals to this solicitation that are received after the closing date and/or time will not be reviewed and will be returned to the proposer. **No exceptions will be allowed.**

c. Supplemental and clarifying information. Unless requested by the Division, no additional information will be accepted from a proposer after the deadline for submittal of applications.

V. AWARDING FUNDS INFORMATION

5.0 EVALUATION CRITERIA, POTENTIAL POINTS TO BE AWARDED AND PROCEDURES

All proposals received in accordance with the requirements detailed previously will be reviewed by an evaluation committee and ranked accordingly. The evaluation committee will evaluate all proposals against stated criteria. To be considered for an award, an proposal must score at least 119 points, or 70% of the total points available in the evaluation process, unless the evaluation committee determines it is in the best interest of the state to make an award to a proposer who scores less than 119 points. Proposals will be reviewed and evaluated according to the following criteria.

MAXIMUM POINTS

40 Organizational Experience

The proposer has or provides a credible plan to secure through sub-contract or additional hiring, fully **documented** experience:

- developing and maintaining training curricula of a complex nature
- developing and maintaining a comprehensive training and outreach program for a wide range of audiences, from the general public to practitioners of a complex discipline;
- providing high quality and comprehensive technical assistance and support to social service practitioners and agencies in the area of disability or age-related entitlements;
- using distance learning principles and the application of relevant technologies;
- understanding and facilitating effective consumer use of disability related entitlement programs (federal, Wisconsin-specific and local) including their “work incentive” features;
- maintaining positive, productive working relationships with federal, national, state and local organizations including government, university, private non-profit and private for profit organizations related to disability and aging issues and entitlements;
- facilitating consumer understanding of and access to employment services and supports;
- facilitating practitioner interaction, networking and service quality

30 Staffing and Qualifications for Applicant Organization and/or Sub-Contractor

The proposing agency (or subcontractor, if applicable) either has existing qualified personnel or has proposed a functional staffing or volunteer pattern which is capable of supporting program activities. Staff positions which will be charged to the grant have been fully justified and are reasonable and necessary for carrying out the project. Personnel including volunteers, proposed for this project are or will be well qualified as evidenced by position requirements, education/experience, and/or proposed training plans.

10 Issues/Needs Statement

The proposer’s response shows that they have an excellent understanding of consumer, stakeholder and counseling practitioner needs related to providing entitlement program information, counseling and assistance to persons with or potentially eligible for disability or age related entitlements or to relevant stakeholders (employers, government program staff, advocates etc). The proposer’s response indicates an understanding of the potentially adverse relationship between disability entitlement and employment due to cash income and development of assets. The proposer will also show an understanding of the range of issues present when advancing an occupation from one that is developing toward full professional status.

15 Purpose

The purpose of the proposer's project is clearly stated and consistent with the purpose of the RFP. The proposer has made it very clear how it plans to utilize these awarded funds to develop a new program or to maintain if not strengthen a current program. The strategies described are logical and appropriate responses to the description of the issues and needs of consumers, stakeholders, practitioners, local communities, counties, tribes and/or regions. The discussion indicates an excellent understanding of how this program will impact consumers, stakeholders and practitioners. For all groups to be served, the stated purpose of the project shows the proposer understands the issues confronting, and needs of, these groups and is proposing effective strategies to address the issues and meet the needs.

15 Objectives

The proposer's objectives are clearly stated, realistic, and measurable when applicable and are consistent with the Issues/Needs Statement and the program requirements of this RFP. Objectives must be achieved during the funding period.

40 Methods/Work Plan

The methods described in the proposal and work plan are related to the objectives, will facilitate the project's accomplishing what has been proposed, and are sequentially reasonable. Activities in the work plan are clearly assigned to personnel qualified by a combination of experience and training. The methods are consistent with the objectives and can be accomplished given the time frames, staffing patterns, and the budget proposed. Time frames for all tasks and activities in the work plan are appropriate to ensure that sufficient effort is planned.

10 Coordinated Service Delivery

The proposer demonstrates that necessary community, regional and/or statewide agencies have been or will be involved in the planning and execution of the project to achieve an approach aimed at a coordinated program delivery system. The proposal includes a description of how the proposer will work (as appropriate) with local, county, tribal and/or regional agencies and providers; and a detailed explanation as to how these coordination efforts relate to the proposal.

10 Data Collection and Evaluation

A self-evaluation should follow from the **Objectives** and **Work Plan**. The proposer will discuss criteria of measurement which will demonstrate if the intended results have or have not been achieved.

5.1 PROPOSER RESPONSES

Proposals submitted in reply to this RFP shall respond to the specifications stated herein. Failure to respond to the specifications may be a basis for an application being eliminated from consideration during the selection process.

In the event of an award, the contents of this RFP (including all attachments), RFP addenda and revision and the proposal from the successful proposer will become contractual obligations. The Division reserves the right to negotiate the award amount, the programmatic goals, and the budget items with the selected vendor(s) prior to entering into an agreement.

Justifiable modification may be made in the course of the agreement only through prior consultation with and written approval of the Division. Failure of the successful vendor to accept these obligations may result in cancellation of the award.

5.2 WITHDRAWAL OF APPLICATIONS

Proposals may be withdrawn by written notice. Proposals may be withdrawn in person by the proposer or his/her authorized representative, providing his/her identity is made known and he/she signs a receipt for the proposal.

5.3 AWARD PROCEDURES

The Evaluation Committee's scoring will be tabulated and proposers will be ranked according to the numerical score received. The evaluation committee has the option to conduct interviews and/or on-site inspections of the top ranked proposers to include those results in the consideration of the evaluation points. The Division Administrator will make a final decision if a contract will be awarded. The Division reserves the right to reject any or all proposals and to negotiate the award amount, authorized budget items, and specific programmatic goals with the selected proposer(s) prior to entering into an agreement.

5.4 NOTICE OF INTENT TO AWARD A CONTRACT

Each proposer whose proposal is reviewed by the Evaluation Committee shall receive written notice of the determination of approval or non-funding of the proposed project.

After notification of awards are made, and under the supervision of Division staff, copies of all proposals will be available for public inspection from 9 A.M. CST for five business days beginning November 9, 2007 through Thursday November 15, 2007

Each proposer whose project has not been approved shall be given an opportunity to discuss with the Division representative the reasons for non-funding or may write the Division representative requesting the reason for the decision.

Upon request, the Division representative will clarify non-funding reasons verbally or will respond in writing explaining the reasons for the project not being funded.

5.5 PUBLIC INFORMATION

It is the intention of the state to maintain an open and public process in the submission, review and approval of awards. All material submitted by proposers will be made available for public inspection after notice of intent to award or not to award a contract based on the evaluation(s) of the applications which were submitted. This information will be available for public inspection, under supervision, during the business hours of 9 A.M. CST until 4 P.M. CST until December 31, 2007, at the Office of Independence and Employment, 1 West Wilson Street State Office Building, Room 951, Madison, Wisconsin 53707. No proposal submitted to the state may be marked as confidential, and any materials so marked, by being included in the application, will be considered public information.

Evaluation tabulation and scoring by individual evaluators will also be open for public inspection, but these scores will not identify individual evaluators.

5.6 PROTEST/APPEAL PROCESS

Proposers can only protest or appeal violation of procedures outlined in this RFP. Ranking and scoring by the Evaluation Committee are not subject to protest or appeal. Notice of intent to protest and protests must be made in writing. Protestors should make their protests as specific as possible and should fully identify the procedural issue being contested.

The written notice of intent to protest must be filed with the:

**Administrator of the Division of Long Term Care
1 West Wilson Street
P.O. Box 7850
Room 850
Madison, Wisconsin 53707**

and received in that office no later than the close of business on November 17, 2007, or within five (5) working days after the notice of intent to award is postmarked, whichever is later. The written protest, fully identifying the procedural issue being contested, must be received in the Administrator's Office no later than ten (10) working days after the notice of intent to award is issued.

The decision of the Division of Long Term Care may be appealed to the Secretary of the Department of Health and Family Services, One West Wilson Street, Room 650, Post Office Box 7850, Madison, Wisconsin 53707 within five (5) working days of issuance, with a copy of the protest filed with the Administrator of the Division of Long Term Care.

PART II

TECHNICAL SPECIFICATIONS

Proposers are cautioned that in completing the following Technical Specifications they are to provide as complete information as possible. The only information evaluators will be given about a project is that which is contained within the proposal. For that reason, each copy must be a duplicate of the entire original, including any attachments.

The focus of the funding is to maintain and further develop the Wisconsin Disability Network (WDBN). In order to determine the potential for a proposed project to achieve this aim, applications must fully address the program requirements and specifications which follow.

Proposals must include the following items submitted in the order listed.

- I. Outline and Table of Contents (checklist form)
- II. Application Summary
- III. Abstract
- IV. Narrative
 - Section A - Administration
 - Section B - Program
- V. Detailed Budget Request
- VI. Appendices

A. APPLICATION SUMMARY (Section II above)

Complete the Application Summary following the instructions below. The Application Summary should be the second page in your proposal.

Section I. Agency Information

- Item 1 Enter the Project Title
- Item 2 The "Applicant Agency" is defined as the legal entity which assumes the liability for the administration of the grant funds and is responsible to DHFS for the performance of the project activities.
- Item 3 Enter name, address, and telephone number of project director.
- Item 4 Enter name, address, and telephone number of project fiscal agent. The fiscal agent is the individual who is responsible for the receipt and administration of the project funds and for the submission of all fiscal reports to DHFS.
- Item 5 Enter the Internal Revenue Services number assigned to the agency which is responsible for the employees hired under these project funds.
- Item 6 The proposal must be designed to serve the entire state
- Item 7 Check the box applicable to the "Applicant Agency" entered under Item 2.
- Item 8 If all or parts of the project will be subcontracted, fill in the name and address of the subcontractor.
- Item 9 Identify proposed site(s) (city and county). Specific addresses are unnecessary.
- Item 10 Enter the proposed dates for the project.

Section II - Budget Summary

The budget summary contains the total projected costs by cost category. All figures on this form should be rounded to the nearest dollar.

- Item 11 Enter line-item totals from the Detailed Budget Request.
- Item 12 Enter total project cost for the entire period of the project.
- Item 13 Enter the name, title, telephone number and signature of official authorized to commit applicant organization to this agreement.

APPLICATION FOR WISCONSIN DISABILITY BENEFITS NETWORK (WDBN) OPERATOR

Agency Name: _____

Proposal Title: _____

Project Category: _____

Proposers are required to number all pages and to organize their application according to the following format. This form serves as a checklist of application contents and facilitates application evaluation. This form must be completed and attached to the front of the finished application.

I	Outline and Table of Contents	Page 1
II	Application Summary	Page 2
III	Abstract	Page 3
IV	Narrative	
	A. Administration	
	1. Organizational Experience	Page 4
	2. Staffing and Qualifications	Page
	B. Project	Page
	1. Issues/Needs Statement	
	2. Purpose	Page
	3. Groups to be Served	Page
	4. Objectives	Page
	5. Methods/Work Plan	Page
	6. Coordinated Service Delivery	Page
	7. Data Collection and Evaluation	Page
V.	Budget	
	A. Budget Request	
	B. Budget Narrative/Justification	

II. APPLICATION SUMMARY

Section A - AGENCY INFORMATION

0. Project Category: NA	1. Project Title		
2. Applicant Agency		Telephone	
Street Address	City	State	Zip
3. Project Director		Telephone	
Street Address	City	State	Zip
4. Fiscal Agent		Telephone	
Street Address	City	State	Zip
5. Employer Identification No.			
6. Area to be served: NA-Project must be statewide		7. Type of Agency (check one) <input type="checkbox"/> State Agency <input type="checkbox"/> Unit of Local Government (specify) <input type="checkbox"/> Private, Non-Profit Agency <input type="checkbox"/> Proprietary <input type="checkbox"/> Tribal Reservation <input type="checkbox"/> Other (specify)	
8. If project will be subcontracted, fill in name and address of sub-contractor.			
9. If activities are to be conducted at a site other than the Applicant Agency, indicate this in the following space. Performance Site(s):			
10. Dates of Proposed Project Period FROM January 1, 2008 THROUGH December 31, 2008			

SECTION B - BUDGET SUMMARY

<u>Budget</u>	<u>Year 1</u> January 1, 2008 through December 31, 2008
1. Salaries	_____
2. Fringe	_____
3. Agency Personal Liability Insurance	_____
4. Travel	_____
5. Equipment	_____
6. Supplies and Operating Expenses	_____
7. Contractual and Consultant Costs	_____
8. Training	_____
9. Advertising	_____
10. Other	_____
12. TOTALS	_____

13. NAME, TITLE AND TELEPHONE NUMBER OF OFFICIAL AUTHORIZED TO COMMIT APPLICANT ORGANIZATION TO THIS AGREEMENT	
Typed Name of Official	
Telephone Number	Title
Signature	Date

III ABSTRACT

The abstract must be one page only. The information in the abstract should provide a brief description of your project, highlighting the main points from the Detailed Budget Request and Narrative Sections of your proposal.

IV NARRATIVE

A. ADMINISTRATION

1. **Organizational Experience**

In this section of your proposal you are to provide a full discussion of your organization's experience that will demonstrate your capability to do this project.

The narrative should, at a minimum, include the following information:

- ✓ your organization's ability to conduct outreach, to coordinate with key organizations and to carry out other provisions of the grant;
- ✓ your organization's ability to provide appropriate training and technical assistance; and
- ✓ your organization's ability to use project funds in a cost effective manner.

If you are proposing to establish a subcontract to carry out elements of your plan or to meet RFP specifications, you are to provide information to document the subcontractor's qualifications and experience. Additionally, discuss why you chose that organization as your subcontractor.

2. **Staffing and Qualifications for Applicant Organization and/or Sub-contractor**

An organization must have sufficient and qualified staff to deliver the services as described. Volunteers, if utilized, must receive training and supervision in order to function effectively.

The agency must either have or make an effort to recruit, hire, and train persons with disabilities and minority staff/volunteers and provide in-service sensitivity training about cultural diversity for staff/volunteers.

The narrative should, at a minimum, include a description of:

- ✓ your agency's current and proposed organizational structure and staffing pattern;
- ✓ provide an organizational chart which indicates current and proposed positions that will implement this project;
- ✓ the responsibilities and qualifications of all new or existing position(s) which will be involved in the project;
- ✓ if you are hiring/sub-contracting staff, discuss why the position(s) is/are needed;
- ✓ if you plan to hire new staff to work in the project, describe your hiring practices which will ensure the position(s) will be filled within 6 weeks of the date of the grant award. If position(s) cannot be filled within the 6 weeks timeframe, estimate the time you will need to fill the position(s) and how the project can be implemented prior to the hiring of the new staff.

- ☞ if your project will utilize volunteers, be specific about their qualifications, roles and functions, what training will be available to them, and the method for providing supervision for the volunteers.

B. PROJECT

1. **Issues/Needs Statement**

An organization must demonstrate that they have an excellent understanding of the programs, stakeholder issues and unmet needs in Wisconsin related to providing information, counseling and assistance. This includes a discussion of how information, counseling, benefits training and practitioner technical assistance is currently being delivered in Wisconsin. This also includes a discussion of benefits counseling quality standardization and practitioner credentialing. The organization should document with statistical data, where available, the extent of the challenges and/or issues (e.g., population potentially in need of benefits counseling, current practitioner capacity and funding availability; public awareness of benefit issues and of available resources such as Medicaid or Medicare Part D; historical usage pattern of existing work incentives, etc.)

Funds under this proposal **may not** be used to supplant current federal and state funding for programs serving seniors or people with disabilities.

The narrative should, at a minimum, include:

- ✓ a clear discussion of whether this is a new project or whether it will be an expansion of an existing project;
- ✓ a full discussion of the need(s), issues and challenges your project will address;
- ✓ include any data available to document the needs, issues and challenges.

2. **Purpose**

The purpose of the project must be clearly stated and consistent with the purpose of the RFP. The strategies described must be logical and appropriate responses to the description of the issues, challenges and needs. The proposer must demonstrate excellent understanding of training methodologies and modalities, provision of technical assistance to professionals and professional stakeholders (state Vocational Rehabilitation, SSA, county social service units, employers etc), disability benefits issues including eligibility rules and determination processes, key program elements such as their work incentive features, disability benefits counseling practitioner needs, disability and aging system elements and issues including strengths and limitations of the service delivery and program administration (federal, state and county) systems. The stated purpose of the project must show that the proposer understands the needs of the special populations involved (i.e., seniors and people with disabilities, issue stakeholders and benefits counseling practitioners) and is proposing effective strategies to meet those needs.

The narrative should, at a minimum, include:

- ✓ a statement of purpose for your organization's proposed project and how grant funds will be used to achieve the stated purpose;
- ✓ a discussion of strategies your project will use to address the challenges and issues you have identified; state why these strategies will be effective; discuss how you plan to

overcome obstacles or barriers to implementing the strategies; and state what you anticipate as the overall impact of your project.

3. Objectives

The project's objectives should be clearly stated, realistic, and measurable if possible and consistent with the Issues/Needs Statement and the program requirements of this RFP.

When writing narrative for this section, keep in mind that:

- ✓ planning objectives should connect with the issues/needs statement and the stated purpose of the project;
- ✓ planning objectives are also a link between the problem statement and the workplan;
- ✓ the statement of any measurable objective should describe objectives or intended results within the framework of four particular limits:
 1. **WHO** or **WHAT** you intend to affect;
 2. **IN WHAT WAY** they will be affected by fulfillment of the objective
 3. The amount of **TIME** the objective will take to achieve;
 4. **A CRITERIA OF MEASUREMENT** by which you can demonstrate that the intended results have or have not been achieved.
- ✓ components of project objectives include: 1) a description of a task or what someone will receive, 2) what activity or product will result, 3) time frame, 4) number of people or agencies to receive something, and 5) group or individual who will perform the task or be the recipient(s) of the activities or product.

5. Methods/Work Plan

The methods described in the proposal and work plan must be related to the objectives, must facilitate the project's accomplishing what has been proposed, and must be sequentially reasonable. Activities in the work plan are to be clearly assigned to personnel. The methods must be consistent with the objectives and can be accomplished given the time frames, staffing patterns, and the budget proposed. Time frames for all tasks and activities in the work plan must be appropriate to ensure that sufficient effort is planned.

When writing narrative for this section, keep in mind that:

- ✓ a method or work plan describes the means used to implement the objective -- your method/work plan must detail all tasks, activities and procedures in a logical progression that will be used to achieve the objective;
- ✓ your method/work plan must include the assignment of responsibility to specific personnel and the timetable for each task or activity to be started and to be completed; and
- you must state who will be responsible for providing supervision to ensure tasks/activities are completed.

The following form is to be used to lay out your objectives and work plan.

PROJECT OBJECTIVES, TASKS AND ACTIVITIES WORKPLAN

PROJECT OBJECTIVE:

	WORKPLAN		
TASKS/ACTIVITIES	Timeframe (include start date and completion date unless task is on-going)	Responsible Party	Expected outcome

6. **Coordinated Service Delivery**

Necessary local, county and/or regional agencies, particularly those with a history of commitment and services to seniors and/or people with disability benefit issues, must be involved in the execution of the project to achieve a coordinated approach. The application must include letters of cooperation from all agencies whose involvement is essential for the success of the project.

The narrative should, at a minimum, include:

- ☞ a description of how your agency will work (as appropriate) with local, county, tribal and/or regional agencies and providers;
- ☞ a detailed explanation as to how these coordination efforts relate to your proposal;

7. **Data Collection and Evaluation**

This self-evaluation should follow from the **OBJECTIVES** and **WORK PLAN** and should discuss how you plan to evaluate your project.

The narrative should, at a minimum, include:

- ☞ Who will be responsible for collecting and analyzing the data; and,
- ☞ Who will be responsible for supervising the data collection and evaluation and for taking corrective actions based on the results of the self-evaluation

DETAILED BUDGET REQUEST- Period:

PROGRAM

1. Personnel

Title of Position	% of time	Hr. rate	Hrs. per month	# months budgeted	Total cost
		\$			\$
		\$			\$
		\$			\$
		\$			\$
		\$			\$

Total Salary \$ _____

- 2. Fringe Benefits for Project Personnel (Employers FICA: Employees Insurance) (_____%) \$ _____
- 3. Agency Personal Liability Insurance
 - a. Professional Staff \$ _____
- 4. Travel
 - a. Professional Staff \$ _____
 - b. Volunteer Workers \$ _____
- 5. Equipment (attach separate sheet detailing) \$ _____
- 6. Supplies and Operating Expenses (attach a separate sheet detailing) \$ _____
- 7. Contractual and Consultant Costs (attach a separate sheet detailing) \$ _____
- 8. Training for Paid and Volunteer Workers: \$ _____
- 9. Advertising \$ _____
- 10. Other Expenses (attach a separate sheet detailing) \$ _____
- 11. TOTALS (lines 1 through 10) \$ _____

NOTE: BUDGET DETAIL IS TO BE PROVIDED IN THE BUDGET JUSTIFICATION FOR (4) TRAVEL, (5) EQUIPMENT, (6) SUPPLIES, ETC., (7) CONTRACTUAL AND CONSULTANT COSTS, AND (10) OTHER EXPENSES.