

**RFI APD 14-005**  
**FLORIDA AGENCY FOR PERSONS WITH DISABILITIES**  
**REQUEST FOR INFORMATION**

**Aging Planning Process for Individuals with Developmental  
Disabilities & Aging Caregivers  
and  
Competency Training for Service Providers**

**RFI RESPONSE DATE: January 15, 2015; 5:00 PM (EST)**

**A. REQUEST FOR INFORMATION**

The Florida Agency for Persons with Disabilities (APD) is requesting information from potential vendors for:

1. The development and implementation of a comprehensive process for advanced planning to enable individuals with developmental disabilities and their caregivers to remain together or in close proximity as they age; especially clients with Alzheimer's and other related dementias; and
2. The development of a competency based, aging specialization training for the APD Waiver Support Coordinators and providers who provide in-home support services.

This is a Request for Information (RFI) only. An RFI is issued solely for information and planning purposes and it does not constitute a competitive solicitation (e.g., Invitation to Bid, Request for Proposal, or Invitation to Negotiate), or a promise to issue a competitive solicitation in the future. This RFI does not commit the Agency to contract for any service or proposed solution whatsoever. A response to this RFI is not an offer and the Agency will not use a vendor's submission to justify a contract with the vendor without complying with applicable laws, rules and policies. Further, APD is not seeking proposals at this time and will not accept unsolicited proposals. Respondents must assure that the proposals for services are consistent with the tenets of the March 17, 2014 revised CMS expectations for the HCBS quality and person-centered services and supports.

## **B. BACKGROUND / PURPOSE**

### **1. Background**

Individuals with developmental disabilities are achieving a greater life expectancy through better health care and support services than in the past. Many of the individuals continue to live with their parents who themselves are getting older and who are their primary caregivers. Approximately 76% of individuals with developmental disabilities live at home, and 25% of their family caregivers are over 60 years of age. It is projected numbers that these numbers will double by 2030. In Florida, data providing estimates of this cohort are not collected consistently, but the state cohort is expected to trend with national estimates. As both individuals with developmental disabilities and their caregivers grow older, diminished capacity is likely to occur. Many individuals within the family unit may need similar support services designed for age related issues (Alzheimer's or other dementias, physical disability, etc.) in order to remain together within their home, or to live together in an alternate setting.

Currently, there are no service provision models for elderly caregivers and their dependents who have a developmental disability in place which systematically provide long or short range planning and integrated services designed for age-related issues. Instead, these models provide fragmented services that do not take into account similar needs of both the parent and their dependent. Often, the family members are separated into different living settings. Those families that remain intact have to seek services from different providers and agencies, which becomes increasingly difficult and confusing as they age. Ideally, an integrated family service model would be facilitated by highly trained providers that are experts in coordination of services for the elderly and those with developmental disabilities. This would provide a single point of entry for service provision that supports the aging family as a whole, while taking into consideration the unique needs of the individuals within the family.

The proposed model shall focus on:

1. APD customers with developmental disabilities who may or may not be experiencing the onset of Alzheimer's or related dementias, or other age-related conditions; and
2. The customers' primary caregivers who are aging and may be developing or have age-related conditions, including Alzheimer's or related dementias.

3. Waiver Support Coordinators to facilitate planning of supports and services to address both the individuals served and their elderly care giver.

To assist with planning and development, the Attachment A provides a census of individuals served by the Agency for Persons with Disabilities by eligible diagnosis and place of residence as of October 2014. The demographics includes those who are served through the HCBS Waiver and those who are on the APD statewide waitlist. In addition, data is provided on the number of individuals served by age range based upon place of residence. Although APD does not have an actual count of individuals who reside with elderly care givers or who have Alzheimer's, the tables below provides statewide data by age ranges where there may be potential for specialized services to be rendered:

<b>HCBS Funded Age Group</b>	<b>Total</b>
Age 03 to 05	23
Age 06 to 14	1,120
Age 15 to 22	5,309
Age 23 to 59	21,912
Age 60 and older	2,357
<b>Grand Total</b>	<b>30,721</b>

<b>Waitlist Age Group</b>	<b>Total</b>
Age 03 to 05	375
Age 06 to 14	5,196
Age 15 to 22	5,459
Age 23 to 59	9,300
Age 60 and older	464
<b>Grand Total</b>	<b>20,794</b>

## 2. Purpose

APD is seeking information from providers regarding an integrated service model that reflects a systematic redesign of how APD and its partners can provide services for customers and their aging caregivers. The model is to contain a comprehensive, advanced planning process that will ensure the family unit can continue to live together in their home, or transition together to an alternate living environment, or in close proximity to each other, well before an age-related crisis occurs that may force unwanted and unplanned interventions

Within the model, APD Waiver Support Coordinators (who are trained and certified in support planning) are to be included in guiding both APD clients and aging caregivers through the aging-planning process.

1. Respondents must provide information in Section C. of this RFI for the following program components:
  - a. Development of a dynamic, comprehensive advanced planning process for customers with developmental disabilities and their aging

caregivers as they age together. The model shall include both advanced planning and a transition plan to ensure customers with developmental disabilities and their caregivers will remain in the home together with up to 24-hour supports and services, or live together in an alternate setting, or live in close proximity. Components of this planning process will include access to and development of:

- i. Full time (as needed) in-home supports for caregivers with Alzheimer's dementia or other age-related conditions to assist them to care for themselves and the customer. These supports should include:
    - Home Health Services
    - Meal Preparation
    - Housekeeping Services
    - Companion Services
    - Respite
    - Adult Day Services
    - Transportation
    - Memory Disorder Clinic Services
  - ii. Alternate living environment/settings.
  - iii. Training / education and resource information specific to their aging progression and service and activity needs.
  - iv. Housing / living environment resource information specific to their aging process, including service and activity needs. This may include changes to the current home, selection of an alternate living environment that meets changing needs and allows the family to remain together, or selection of living environments that are separate, but near one another.
  - v. Targeted screenings and assessments. Individualized assessments, screenings, activities, and services that target the unique needs of aging individuals and aging caregivers, especially those with Alzheimer's or other related dementias.
- b. Development of a training and competency based curriculum for APD Waiver Support Coordinators to implement the advanced planning process for aging customers and their caregivers.

- c. Transition planning for individuals with developmental disabilities to alternative housing when caregivers must be placed in long-term care.

### **C. RFI RESPONSE INSTRUCTIONS**

Respondents to this RFI are asked to be thorough, but concise. The RFI response must include the following:

1. The respondent's name, place of business address (es), contact information, including representative name and alternative, if available, telephone number(s) and email address(s).
2. Description of the respondent's business and its experience as it relates to the services outlined in the RFI. This description should include a narrative that:
  - a. Outlines past experience with state or government agencies or private service providers to develop programs related to aging, Alzheimer's or other dementias, individuals with developmental disabilities, and their caregivers
  - b. Outlines experience with both community-based housing and services and / or institutional programs
  - c. Describes the types of services provided and minimum years of experience with these entities and individuals
  - d. Includes a description of project development and implementation experience examples, and a description of training development experience
3. A statement of interest in or knowledge of the services outlined in this RFI, including a high level outline of any specific product, concept, technology or approach that would pertain to the information sought through this RFI.

#### **Additional elements to be included in the response:**

- a. An implementation schedule for the development of an advanced age planning and transition process for individuals with developmental disabilities and aging caregivers that includes process and materials design, development, and implementation (including training the process);
- b. An implementation schedule for the development of an age-specific, competency-based training certification process for APD Waiver Support Coordinators and other service providers, such as in-home, 24-hour personal supports;

- c. A timeline for developing and implementing the advanced age planning and transition process from design to implementation and training;
- d. A timeline for developing and implementing an age-specific competency-based training certification process for Waiver Support Coordinators and service providers;
- e. A description of the benefits and challenges of the proposal including any identified risks to the Agency's responsibilities over the design and implementation of the advanced aging planning and transition process, and the age specific training and certification process, and the recommendations for overcoming them;
- f. A description of the conceptual model to be implemented and the number of individuals to be served. Include how the model would be rolled out statewide and include timeframes;
- g. A description of the key staffing requirements foreseen to effectively design, implement, operate, and maintain the advanced aging planning and transition process and the Waiver Support Coordinator and service provider age-specific training; and,
- h. An estimate regarding the implementation and operational costs to provide the service request. This breakdown should include options for bundled services provided to both the APD consumer and the caregiver when the services needed are similar. Bundled services could include most of the services referenced at 2.1.a.i. above. Please include narrative which discusses the advantages / disadvantages of bundling as opposed to itemized billing of services.
- i. A description of the outcomes that must be met in order to continue to receive funding as well as the criteria that must be met in order to determine that quality of services are being provided and meeting the needs of the caregiver and the individual with a developmental disability.

#### **D. PROPRIETARY INFORMATION**

Any portion of the submitted response which is asserted to be exempt from disclosure under Chapter 119, Florida Statute, shall be clearly marked "exempt", "confidential", or "trade secret" (as applicable) and shall also contain the statutory basis for such claim on every page. Pages containing trade secrets shall be marked "trade secret as defined in Section 812.081, Florida Statutes". Failure to segregate and identify such portions shall constitute a waiver of any claimed exemption and the Agency will provide such records in response to public records requests without notifying the respondent. Designating material simply as

“proprietary” will not necessarily protect it from disclosure under Chapter 119, Florida Statutes. An entire response should not be considered trade secret.

#### **E. RESPONSE SUBMISSION**

Respondents to the RFI shall submit an electronic copy of its response using Microsoft Word 97 and/or Excel 97 or newer, not to exceed fifty (50) single sided pages in length and sent via email. The software used to produce the electronic files must be logically named.

The respondent shall also submit one (1) electronic redacted copy of the response suitable for release to the public. Any confidential or trade secret information covered under Section 812.081, Florida Statutes, should be either redacted or completely removed. The redacted response shall be marked as the “redacted” copy and contain a transmittal letter authorizing release of the redacted version of the response in the event the Agency receives a public records request.

Responses to the RFI shall be provided no later than **5:00 PM, Eastern Standard Time, January 15, 2015**. Responses shall be submitted to:

Agency for Persons with Disabilities  
Bureau of Quality Management  
Attn: Edwin DeBardleben  
4030 Esplanade Way  
Suite 360K  
Tallahassee, Florida 32399-0950  
[rfi.alzheimersandaging@apdcares.org](mailto:rfi.alzheimersandaging@apdcares.org)

#### **F. PROCESS**

After the Agency has received all responses to this RFI, the Agency, in its sole discretion, shall determine if a meeting with respondents is necessary to clarify the information received. In the event that the Agency decides to hold a meeting, the respondent(s) will be notified via email.

APD will review and analyze information received from this RFI to determine the best option(s) to address the Agency’s objectives and requirements. Any request for cost information will assist the Agency in gaining perspective of the potential budgetary magnitude.

Responses to this request will be reviewed for informational purposes only and will not result in the award of a contract. Vendors submitting a response to the RFI are not prohibited from responding to any related subsequent solicitation. Not responding to this RFI does not preclude participation in any future procurement, if any is issued.

#### **G. VENDOR COSTS**

Vendors are responsible for all costs associated with preparation, submission, and any potential meeting(s) to discuss this RFI. APD will not be responsible for any vendor costs associated with responding to this RFI.

#### **H. REGISTER WITH THE STATE OF FLORIDA**

In order to do business with the State of Florida, all vendors must be registered in MyFloridaMarketPlace. Information about registration with the State of Florida is available, and registration may be completed at the MyFloridaMarketPlace website link under the heading, Business, on the State portal at [www.myflorida.com](http://www.myflorida.com). Those lacking internet access may request assistance from the MyFloridaMarketPlace customer service at 866-352-3776. Registration is not required to respond to this RFI.

#### **I. QUESTIONS**

Questions concerning this RFI should be submitted in writing via email to: [rfi.alzheimersandaging@apdcares.org](mailto:rfi.alzheimersandaging@apdcares.org)

Verbal questions will NOT be accepted. Questions will be answered by sending questions and responses to respondents; accordingly, questions shall NOT contain proprietary or classified information. Copies of the responses to all questions will be made available through electronic posting on the Vendor Bid system website at:

[http://www.myflorida.com/apps/vbs/vbs\\_main\\_menu](http://www.myflorida.com/apps/vbs/vbs_main_menu).

#### **J. AGENCY FOR PERSONS WITH DISABILITIES**

The Florida Agency for Persons with Disabilities (APD) works in partnership with local communities to support people with developmental disabilities in living,



learning, and working in their communities. APD provides critical services and supports for customers with developmental disabilities so they can reach their full potential. The agency serves people with autism, cerebral palsy, Down's syndrome, Intellectual Disabilities, Prader-Willi Syndrome, and Spina Bifida.

Additional information about the Florida Agency for Persons with Disabilities can be found on the Agency's website at: <http://apdcares.org/>.

**NOTICE TO PERSONS WITH DISABILITIES IN NEED OF A REASONABLE ACCOMMODATION:** Please contact Edwin DeBardeleben to make your request at [rfi.alzheimersandaging@apdcares.org](mailto:rfi.alzheimersandaging@apdcares.org) as soon as possible before the deadline for submittal.