

**RFP #A1010**  
**Representative Payee for Adults with Developmental Disabilities**

**I. Introduction and Background**

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal and to inform them of basic requirements that the County uses as part of its standard contract process. *Your proposal should include the completed City-County Consolidated Application or County Short Form Application and information requested in Section III below.*

Standard contract requirements concerning Affirmative Action, the Americans with Disabilities Act, the County's Living Wage ordinance, contract termination and modification, etc. are included in the County's boilerplate contract. This contract is subject to change. For further information you can view a copy of the contract on our website at:

<http://www.danecountyhumanservices.org/becomeprovider.htm>

Contracts with the Department of Human Services limit administrative costs/expenses to a 15% ceiling.

**II. Scope of the Project:**

**A. Project Description:**

This Request for Proposals seeks an individual or organization that will receive Social Security and/or SSI payments for individuals who cannot manage or direct the management of their money. The Representative Payee will use the funds to meet the current and foreseeable needs of the beneficiary and save any remaining funds for the beneficiary's future use.

Most of the beneficiaries' funds are benefits from the Social Security Administration. However, other sources of funds may also be considered, such as retirement accounts, railroad pensions, or earned income. Decisions on which funds to manage, other than Social Security, are made on a case-by-case basis. The Representative Payee uses any of the funds to pay bills and coordinate needed care. The typical sources of funds include:

- Social Security –
  - SSI and SSI-E paid before the month;
  - SSDI after the month
- Veterans Benefits
- Railroad Benefits
- Pensions
- Trusts
- Earned income

There are no specific procedures for the other funds. If or how they can be managed by a payee is determined on an individual basis. With Social Security funds, the SSA decides and authorizes the payee to act on the consumer's behalf. With the other sources of funds, the support team typically decides who, if not the individual consumer, will be the recipient, and how the funds will be disposed.

B. Objectives:

The goal of managing the consumer funds is to provide for basic needs such as food, rent, utilities, transportation, and medical/personal expenses to ensure the consumer's proper care and well being. And, whenever possible, the goal is also to teach the consumer how to manage his/her own funds, to lessen or eliminate the need for the services of a payee.

C. Needs/Expectations:

The Representative Payee:

- Must possess an in-depth knowledge of Social Security benefits and related work Incentives as well as knowledge of Medicaid eligibility, benefits, and related rules.
- Must ensure that payments are used to meet the beneficiary's immediate day-to-day needs for food and housing. After these needs are met, funds may be used for the beneficiary's personal needs such as recreation and miscellaneous expenses. May also use funds to pay for medical and dental care not covered by Medicare, Medicaid or other means.
- Must first meet the beneficiary's current and reasonably foreseeable needs and then save the remaining funds.
- Must spend the funds in the best interest of the beneficiary and to consider the beneficiary's wishes as much as possible. However, the Representative Payee will have the final say.
- Communicates with the consumer, guardian (if any), support team and others to develop an individualized budget
- Gathers supporting documentation to justify budget expenses
- Develops the best possible budget within the constraints of the beneficiary's funding
- Receives and manages the beneficiary's funds using the computerized Payment Processing System
- Prepares monthly budgets and sends them to the consumer and system-wide Support Broker/Case Manager
- Pays bills in a timely manner
- Advocates on the consumer's behalf with landlords, utility companies, bill collectors, etc.
- Stays updated on all Social Security benefits and any changes to the benefits
- Notifies the consumer and/or system-wide Support Broker/Case Manager as needed regarding asset limits, SSA changes, Medicare/Medicaid changes/reviews, etc.
- Maintains open communication with the system-wide Support Broker/Case Manager as it relates to the care and welfare of the consumer, especially during times when the consumer is in crisis or in vulnerable situations
- Maintains regular communication with consumers regarding their welfare and financial status
- Maintains open communication with SSA and awareness of the contract obligations with SSA
- Reviews the budget and authorizes payment of specific items on a monthly basis
- May be requested to teach consumers methods to manage their own finances
- Completes a periodic review of non-medical eligibility factors called a "re-determination". The re-determination form asks for information about the beneficiary's income, resources and living arrangements. The information is

used to help determine whether the consumer is still eligible for and receiving the correct payment amount

- Provides benefit information to service agencies or medical facilities that serve the beneficiary, and to the Support Broker and the COUNTY Program Specialist upon request
- Completes an annual accountings of benefits received
- Must promptly report any changes or events which could affect the beneficiary's eligibility for benefits or payment amount to the appropriate authorities, including the Support Broker and the COUNTY Program Specialist;
  - The following must be reported:
    - the consumer dies;
    - the consumer moves or his/her whereabouts are unknown;
    - the consumer marries or divorces;
    - the consumer starts or stops working;
    - the consumer 's disability improves;
    - the consumer leaves or plans to leave the U.S. for 30 consecutive days or more;
    - the consumer 's immigration or citizenship status changes;
    - the consumer is confined to a correctional institution or has an unsatisfied warrant;
    - the consumer no longer needs a payee.
    - countable resources that exceed \$2,000 for an individual or \$3,000 for a couple;
    - the consumer moves, even temporarily, to or from a hospital, nursing home or other institution;
    - a married consumer separates from his or her spouse, or they begin living together after a separation;
    - someone moves into or out of the consumer 's household;
    - when the consumer has any change in income (wages, government payment, pension, etc.) or resources.

D. Current Operations:

About 750 adults with developmental disabilities receive payee services. Fiscal Assistance of Dane County currently functions as Representative Payee for approximately 550 adults with developmental disabilities. Additionally, the County plans to transition 200 consumers whose residential provider currently functions as payee to an independent payee.

The County is interested in offering choice to consumers, and is seeking additional provider(s). The County is interested in local vendors and as the majority of individuals served and to be served live in Madison. A provider with an easily accessible Madison location would be beneficial to consumers.

- E. Maximum funding available for this project is \$40.00/person/month. The proposer should indicate the maximum and minimum number of individuals they are prepared to serve and any start-up costs that may be required. Base the personnel schedule and program budget on the minimum number to be served. An additional personnel schedule and program budget based on the maximum number may be submitted, but is not required.

The County reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the County may negotiate a contract with the next highest scoring proposer.

**III. Request for Information in addition to the Application form (required):**

**New applicants to this program must complete A – C. If you are a current provider of this program proceed to D.**

- A. Submit 3 references. References should be specific to the service offered. References should be from agencies you have done business with or those with whom you have collaborated.
- B. Include your agency’s mission statement. Also provide resumes of key staff and copy(s) of licenses, if applicable.
- C. If this is an existing program for your agency, please provide information of the demographics of your participants. If this is a new program for your agency what are your expectations of the participants’ demographics when the program is up and fully operational.
- D. Quality Assurance and Improvement: What mechanisms or processes are you using to assure the achievement of the outcomes you have identified under “Program Activities”?
- E. Additional pages: The proposer may use up to 3 additional pages for program description, program activities, etc.

**IV. Evaluation Criteria.** Scoring from the consolidated application is as follows:

<b>Program Activities</b> (County Short Form Application, p. 2)	45%
<b>Quality assurance and quality improvement practices</b> (RFP Section III. D.)	20%
<b>Experience and qualifications</b> (County Short Form Application, p. 4)	25%
<b>Program budget</b> (County Short Form Application, Appendix A.)	10%

**V. Contact Information:** Please register your interest in this proposal with the contact person below. This will facilitate any additional information sharing with all interested parties. For clarifications or questions concerning this application, this is your contact.

**Contact:** Dan R. Rossiter  
**Phone:** 608 242-6473  
**E-Mail:** Rossiter@co.dane.wi.us

## **VI. Timeline**

Application Workshop:

April 16, 2009  
11 a.m. – 12 noon  
Dane County Job Center Office, Ballroom  
1819 Aberg Avenue

Application due from vendors: May 29, 2009, 12 noon  
Notification of intent to award (est.): July 30, 2009

**Your completed proposal should include the following:**

- 1) A completed County Short Form application**
- 2) Additional information requested in Section III above.**

**Submit your completed proposal to:**  
**Dane County Human Services**  
**Attn: RFP #A1010**  
**1202 Northport Drive**  
**Madison, Wisconsin 53704**

**Proposals are due no later than May 29, 2009, 12 noon.**