



# **The Alliance for Aging OAA RFP 2009 Reviewer Instructions**

**October 1, 2009**

# Reviewer Instructions



## Introduction, Part 1:

You have been recruited to review and evaluate applications for the Older Americans Act grants in Miami-Dade and Monroe Counties. Each of you will be reviewing parts of the applications for one of four Titles/Subtitles,

- III-B, for support services
- III-C1, for congregate meals
- III-C2, for home delivered meals
- III-E, for caregiver support.

# Reviewer Instructions



## Introduction, Part 2:

For each separate application you will be evaluating a series of items contained in this RFP, namely items covered under:

- Older Americans Act Service Delivery System,
- Quality Assurance,
- Service Grid, and
- Outcome Measures and Standards.

For these items, you are determining if the applicant satisfactorily addresses specific issues.

# Reviewer Instructions



## Introduction, Part 3:

Other components of this RFP, for example, client demographics, applicant's qualifications and prior experience, and fiscal items, are scored separately. These other components' scores do not require any judgment and are calculated by formulas using specific information about the applicant. The result of your review will be incorporated into producing an overall score that will be used to help select providers for services to elders in Miami-Dade and Monroe Counties.



# Reviewer Instructions

## RFP Materials Provided:

1. Reference Book, which includes:
  - Chapter 4 of the Department of Elder Affairs Program and Services Handbook.
  - Service definitions
  - The application instructions
2. One copy of Each Application for the Title you are reviewing
3. One Score Sheet for Each Application
4. DVD with Instructions on rating each application

# Reviewer Instructions



## Pre-Review:

- ☞ Read the application pages provided to you.
- ☞ Review the reference materials in the reviewer's book.
- ☞ Feel free to refer to the book throughout your review.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## The Review –

- ☞ Read the application.
- ☞ For each item on the score sheet, check each box for which the applicant provides a satisfactory explanation.
- ☞ For each item, check all boxes that apply.
  - ☞ For any given item, you may check all of the boxes, some boxes, one box, or no boxes at all.
- ☞ Each box must be checked or remain unchecked based on its own merits. Unless it is specifically referenced, answers to prior questions should not be considered.
- ☞ You must choose to either check or not check each box. – You may not give partial credit.

# The Older Americans Act Service Delivery System, Quality Assurance, and the Service Grid

## The Review –Cont.

For example, item 3.A.2 reads:

<p>3.A.2. <b>Service access, delivery and reporting process. (Service Prioritization).</b> Applicant described the process followed to assess, prioritize access, coordinate and deliver OAA services to targeted consumers.</p> <p>Check box if the applicant satisfactorily explains how it will:</p> <p><input checked="" type="checkbox"/> Assess      <input checked="" type="checkbox"/> Prioritize Access      <input checked="" type="checkbox"/> Coordinate      <input checked="" type="checkbox"/> Deliver</p> <p>Enter the number of checked boxes. This is the score. (0-4)</p>	
--	--

If you conclude that the applicant satisfactorily explains how it will assess, prioritize access, coordinate, and deliver services, you would check all 4 boxes.

# The Older Americans Act Service Delivery System, Quality Assurance, and the Service Grid

## The Review –Cont.

For example on the same item

<p>3.A.2. <b>Service access, delivery and reporting process. (Service Prioritization).</b> Applicant described the process followed to assess, prioritize access, coordinate and deliver OAA services to targeted consumers.</p> <p>Check box if the applicant satisfactorily explains how it will:</p> <p><input checked="" type="checkbox"/> Assess      <input checked="" type="checkbox"/> Prioritize Access      <input checked="" type="checkbox"/> Coordinate      <input type="checkbox"/> Deliver</p> <p>Enter the number of checked boxes. This is the score. (0-4)</p>	
---	--

If you conclude that the response satisfactorily explains how it will assess, prioritize access, and deliver services, but it does not address, to your satisfaction, how it will deliver services, you would check only 3 boxes.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## Special Cases –

- ☞ There are no boxes for items 3.B.1 and 3.B.2 on the Proposal Evaluation Instrument.

<p>3.B.1. <b>Provider Resources.</b> Applicant identified other sources of funding or resources used to supplement the funding under this RFP.</p> <p>(b) (5) - DDP</p>
<p>3.B.2. <b>Provider Financial Capacity.</b> Applicant described plans for further development of its financial capacity.</p>

- ☞ Each of these two items should be scored as per the instruction in the box.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## Special Cases –items 3.B.1 and 3.B.2 on the Proposal Evaluation Instrument.

- ☞ If the applicant meets the criterion, place the maximum number of points in the space to the right. If the applicant does not meet the criterion, place a zero in the space to the right.
- ☞ The points for item 3.B.1 should be either 0 or 2.
- ☞ The points for item 3.B.2 should be either 0 or 3.
- ☞ There is no partial credit for each of these questions—they are all or nothing.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## Score –

- Instructions for calculating the score for each item are provided below the boxes.
- With some items, the score is the count of the number of boxes checked. For other items, it is a multiple of the number of boxes checked.
- The numbers in parentheses are the minimum and maximum score.
- AGAIN – Each box is either checked or not checked.

# The Older Americans Act Service Delivery System, Quality Assurance, and the Service Grid

For example, each box in item 3.A.2 is worth only one point.

<p>3.A.2. <b>Service access, delivery and reporting process. (Service Prioritization).</b> Applicant described the process followed to assess, prioritize access, coordinate and deliver OAA services to targeted consumers. Check box if the applicant satisfactorily explains how it will:</p> <p><input type="checkbox"/> Assess      <input type="checkbox"/> Prioritize Access      <input type="checkbox"/> Coordinate      <input type="checkbox"/> Deliver</p> <p>Enter the number of checked boxes. This is the score. (0-4)</p>	
---	--

If you checked no boxes, the score would be zero.

If you checked 1 box, the score would be 1.

If you checked 2 boxes, the score would be 2, and so on, up to 4 points.

There is no partial credit. Scores can only be 0, 1, 2, 3 or 4.<sup>13</sup>

# The Older Americans Act Service Delivery System, Quality Assurance, and the Service Grid

For example, each box in item 4.A.1 is worth two points

<p>4.A.1. External <b>Quality Assurance – Client Satisfaction Methods</b>. Applicant described in detail the process to be followed in determining client satisfaction.</p> <p>Check box if the applicant satisfactorily explains how it will:</p> <p><input type="checkbox"/> Determine Consumer Satisfaction      <input type="checkbox"/> Address Consumer Concerns      <input type="checkbox"/> Implement Needed Changes</p> <p>Enter the number of checked boxes and multiply by 2. This is the score. (0-6)</p>	
--	--

If you checked no boxes, the score would be zero.

If you checked 1 box, the score would be 2.

If you checked 2 boxes, the score would be 4.

If you checked all 3 boxes, the score would be 6.

There is no partial credit. Scores can only be 0, 2, 4 or 6.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## Score –

- ☞ The Scores will be tabulated based on the boxes checked.
- ☞ Boxes cannot be partially checked.
- ☞ Scores for each item are limited.

# The Older Americans Act Service Delivery System, Quality Assurance, and the Service Grid



## Examples –

3.A.2. **Service access, delivery and reporting process. (Service Prioritization).**  
Applicant described the process followed to assess, prioritize access, coordinate and deliver OAA services to targeted consumers.  
Check box if the applicant satisfactorily explains how it will:

Assess     Prioritize Access     Coordinate     Deliver

Enter the number of checked boxes. This is the score. (0-4)

☞ Item 3.A.2 may only have a score of either 0, 1, 2, 3, or 4.

5.B. **Assessed Need.** Applicant provided a detailed description relating customers/ catchment area needs to services requested.  
Check box if the applicant's narrative satisfactorily describes:

Intended Clients     Client Unmet Needs     Service Rationale/ Justification

Enter the number of checked boxes and multiply by 3. This is the score. (0-9)

☞ Item 5.B. may only have a score of 0, 3, 6, or 9.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## Page Limitations –

- Older American Act Service Delivery System (Subsection 3) is limited to 8 pages.
- Quality Assurance (Subsection 4) is limited to 2 pages (excluding training plans).
- The Service Grid (Subsection 5) is limited to 2 pages.
- According to the RFP, all pages are required to be typed, double-spaced.

# The Older Americans Act Service Delivery System, Quality Assurance and the Service Grid



## If Application Exceeds Page Limitations –

- ➡ Starting with page 1, only review the number of pages allowed as specified on slide 17.
- ➡ If the response is single-spaced, limit the number of pages to review to half the number of pages as specified on slide 17.

# *Outcome Measures*



## Outcome Measures –

- ☞ Typing may be single-spaced.



# *Outcome Measures*

## The Review –

- ☞ Read the application.
- ☞ For each outcome measure, if the applicant provides satisfactory strategy for meeting the outcome measure, check the box labeled “Provided Strategy.”
- ☞ For each outcome measure, check the box labeled “Provided Action Steps” if the applicant provides a satisfactory set of action steps for meeting the outcome measure.
- ☞ For each outcome measure, if the applicant satisfactorily states that they will exceed the standard outcome measure check the box labeled “Plan Exceeds Strategy.”

# *Outcome Measures Review*



## Special Cases For Titles III-B & III-E–

- ☞ Outcome measures 2 through 6 apply only to applicants who are applying for at least one of the following services: adult day care, counseling, chore, escort, homemaker, personal care, or respite. These are called “Registered Services”.

# Outcome Measures Review

## Special Cases –

- ☞ If the applicant is not applying for any of the services listed on slide 21, then evaluate **ONLY** outcome measure 1 and then **mark “N/A” in the space provided** on the score sheet.

Enter the number of checked boxes as score. (0-3)	
Reviewer note:	<p>Outcome measures 2 through 6 apply only if the applicant is proposing to provide ANY of the following services: adult day care, counseling, chore, escort, homemaker, personal care, or respite care. If the applicant is NOT proposing to provide any of these services then write “N/A” in the space on the right and skip the rest of the outcome measures in this application. Otherwise, review and score the five remaining outcome measures.</p>
	<b>N/A</b>

- ☞ If an applicant should have responded to other outcome measures, but does not, **leave check boxes blank.**

# *Outcome Measures Review*



Special Cases For Subtitles III-C1 & III-C2–



Score all outcome measures on the score sheet.

# ***VERY IMPORTANT***



IF you check a box by mistake -

- Make an "X" larger than your erroneous checkmark.
- Write the word "No" close to the "X."
- Initial next to the "No."

# ***VERY IMPORTANT***



IF you need to re-check a box -

- Make an "X" through the word "No."
- Write the word "Yes" close to the "X."
- Initial next to the "Yes."

# ***VERY IMPORTANT***



## **DEADLINE:**

- ☞ Please return your completed review sheets to  
The Alliance for Aging, Inc.  
760 NW 107 Ave. Suite 214  
Miami, FL 33172

by

Tuesday, October 20, 2009  
At 5:00pm

# ***VERY IMPORTANT***



If you find that you are not able to finish  
by the deadline:

Please e-mail the Alliance for Aging, Inc. as soon as you  
start to have concerns at:



[OAARFP2009@elderaffairs.org](mailto:OAARFP2009@elderaffairs.org)

# *Other Reviewers*



## For Applicant's Qualifications and Prior Experience

- ☞ Alliance staff will review internal files to determine if the applicant is a current or former Alliance provider in the past three years.
- ☞ If they are, the applicant will be scored as an Alliance provider, as specified in slide 29.
- ☞ If they are not, the applicant will be scored as a non-Alliance provider, as specified in slide 30.



# *Other Reviewers*

## For Applicant's Qualifications and Prior Experience

For Alliance for Aging, Inc. Providers-

- ☞ Alliance staff will review internal files to ascertain:
  - ☞ If the applicant is a current or prior Alliance provider,
  - ☞ how long the applicant has been an Alliance Provider,
  - ☞ If the services provided are those applied for, and
  - ☞ Corrective Action Plan status.
- ☞ Alliance staff will mark the appropriate box on the score sheet and initial.



# *Other Reviewers*

## For Applicant's Qualifications and Prior Experience

For Non-Alliance for Aging, Inc. Providers-

- ☞ Alliance staff will review submitted monitoring reports.
- ☞ Alliance staff may call monitoring agencies to verify :
  - ☞ How long the applicant has been a provider,
  - ☞ If the applicant provided services to elders,
  - ☞ If the services provided are those applied for, and
  - ☞ Corrective Action Plan status.
- ☞ On the score sheet Alliance staff will note all contacts' names and telephone numbers, mark the appropriate box, and initial.

# *Other Reviewers*



## Calculating the Final Score-

- ☞ All elements that are used to base the applicant's final score, are transcribed into a computer program.
- ☞ Two Alliance staff members will independently transcribe the data from the applications.

# *Other Reviewers*



## Calculating the Final Score (Continued)-

- ☞ The computer program will flag differences in the double-entered data.
- ☞ James Tillery will review all cases for the flagged differences.
- ☞ The computer program performs all of the calculations.

# ***VERY IMPORTANT***



As you know, the application should stand on its own merits. You should not consider information about the applicant beyond what is provided in the application.

Your previous experiences with the applicant should not affect your decisions.

# ***VERY IMPORTANT***



As you are aware, no aspect of this RFP should be discussed with:

- ☞ Another Reviewer
  
- ☞ The Applicant
  
- ☞ Do not allow any applicant to contact you.

# ***VERY IMPORTANT***



If you have questions at any time:

Please e-mail any questions to:

☞ [OAARFP2009@elderaffairs.org](mailto:OAARFP2009@elderaffairs.org)

☞ Responses will be posted up until October 19, on the Alliance's website, [www.allianceforaging.org](http://www.allianceforaging.org)



**Thank You**