



NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

2012 Requests for Proposals

Nutrition Services

Technical Assistance Workshop

February 1, 2012

Meeting Notes

1. Welcome

Anna Schoon, Director of Planning and Development

2. Proposal Basics & Electronic Submission

John Hamlin, Quality Coordinator

Notes: Technical Assistance Workshop - General RFP Overview

<http://www.nwi-ca.com/> ----> "For Service Providers"

I. RFP Access and Completion

a. Access all documents on website – Sections I & II

- i. **Section I General Info** – Five documents [**note: only one "section I" is needed per provider...if you are applying for multiple services, you'll need to DL the corresponding Section II for EACH of those services**]

1. Instructions [**please read**]
2. Instructions for elec. Submission
3. Documentation of computer hardware/Software worksheet (**not editable at this time – we will fix**)
4. RFP Section I – word
5. RFP Section I – PDF [can fill out either document]

- ii. **Section II Service Specific** – Five Docs - **Documents pertinent to your service**

1. Service definition
2. RFP Section II – word
3. RFP Section II – PDF
4. Instructions [please read]
5. Instructions for elec. Submission

b. Document Completion

- i. Must be typed on 8 ½ by 11" paper – no handwritten proposals accepted
- ii. All requested Narrative Info, or requested insurance/company forms must also be submitted in a typed and/or electronic document

5240 Fountain Drive ● Crown Point, IN 46307

Ph: 219.794-1829 ● Toll-Free: 800-826-7871 ● Fax: 219-794-1860 ● TTY: 888.814.7597

An Equal Opportunity Employer





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

- iii. Reminder - Inst for Electronic Submission Document not editable – we WILL fix/upload
- iv. We request that you collate/sequence the documents, label and number them as indicated in the RFP instructions. Feel free to label each section (IE, Applicant Info, Service Section) if desired

II. RFP Submission and Review

- a. Electronic Submission – we STRONGLY encourage providers to submit proposals electronically. Instructions are included within EACH RFP download folder on the website but I will review with you here
 - i. Scan entire proposal (Section I and Service Specific Section II) into a single PDF document (your scanning device should give you the option to utilize this file type)
 - ii. Save each proposal document in this example format: “**ABC MEALS – HOME DELIVERED MEALS**”
 - iii. EXISTING PROVIDERS will upload each proposal document to their agency-specific folder on our extranet site <https://extranet.nwi-ca.com>
 - iv. NEW PROVIDERS/PROVIDERS WITHOUT EXTRANET ACCOUNT will send their PDF document to: proposals@nwi-ca.org. There is a file size limit of 10MB – providers requesting for more than 1 service who have a potentially larger proposal may need to send separate services via separate files in 2 separate emails. If your email allows, request a delivery confirmation and read receipt when sending your email (this option is located in OPTIONS tab of MS outlook)
- b. Hard Copy Submission – again, we strongly encourage you to submit electronically. Here are a few tips/important items for those who choose to deliver a hard copy.
 - i. Do not staple/clip any documents contained in the proposal. Use of binding clips is perfectly fine to separate specific sections.
 - ii. MAILING – each section should be placed in a file folder or neatly in an envelope and labeled with your organizations name, and names/labels for each section if you have them separated. RFPs must be received by due date: **FEB 17, 2012**. They will all be date stamped upon arrival. Postmarks will not be accepted as proof of receipt
 - iii. HAND DELIVERY – proposals will also be accepted at our front desk if you wish to hand deliver.
- c. RFP REVIEW
 - i. Proposals are verified as received/complete by a designated member of our 211/reception staff and are then forwarded/uploaded to our FORTIS database so that they can be forwarded to designated review teams throughout NWICA where they will be graded and forwarded back to Anna and myself for final review.
 - ii. THRESHOLD REVIEW – proposals are reviewed initially to ensure that minimum criteria are met. Proposals lacking entire sections, handwritten elements, or showing evidence to suggest that they are not in good standing with the Secretary of state may be eliminated from

5240 Fountain Drive ● Crown Point, IN 46307

Ph: 219.794-1829 ● Toll-Free: 800-826-7871 ● Fax: 219-794-1860 ● TTY: 888.814.7597

An Equal Opportunity Employer





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

consideration. Also, applicants who do not demonstrate financial soundness may be eliminated as well.

- iii. NWICA proposal review and scoring process is conducted by designated staff who specialize in areas of review (ie Finance staff, applicable program staff for given RFPs).
- iv. Those selected will have their contracts recommended to the board for approval, and, if approved, shall be required to enter into a written contract with NWICA. All notifications on these matters will be delivered in writing.
- v. Additional info/clarification may be requested at any time by NWICA.

Questions and Answers:

The Electronic Submission instructions say that Section 1 should be scanned with each service proposal, but other instructions say we only have to complete one Section 1. Which instruction is correct?

If you are scanning/emailing a proposal to NWICA, please scan/email Section 1 with each service. If you are delivering a hard copy, please only submit one copy of Section 1.

When will provider be notified of the disposition of proposals?

Nutrition providers should know by early April if their proposals have been accepted.

3. Restaurant Voucher Program & Other Service Specific Information

Kellie Marshall, Nutrition Coordinator

Notes: I am going to talk about a new program that is being offered this year in the RFP Process. The program is called the Restaurant Voucher Program. I am sure that some of you have already heard about it.

The Restaurant Voucher Program is an innovative nutrition program that meets the Older Americans Act and state/local laws and requirements to be considered a senior nutrition program.

The participating Restaurant offers services including nutrition, and social interaction for the older adults. The restaurant will provide the eligible participants with a hot or otherwise appropriate nutritionally balanced meal served in a non-traditional setting.

In recognizing the changing senior demographics we are faced with today, seniors are less likely to go to a traditional community location for a meal for various reasons. Such as: Multiple medical appointments, transportation getting to the site during the specific time, volunteering their time to assist others. The congregate program has a time-restraint attached to it in order to receive a meal. This program provides the flexibility needed for an older adult to eat a nutritious meal and still keep to their busy schedule.

The local Restaurant is used as the daily meal site. In this setting, program participants meet at the restaurant during identified times and use the program vouchers to eat a meal. The participating restaurant will provide

5240 Fountain Drive ● Crown Point, IN 46307

Ph: 219.794-1829 ● Toll-Free: 800-826-7871 ● Fax: 219-794-1860 ● TTY: 888.814.7597

An Equal Opportunity Employer





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

and help eliminate the growing need for the seniors to receive a nutritionally balanced meal, and at the same time provide the accessibility and availability to receive that meal.

This program also improves the senior's dignity and self worth. It enables the seniors to eat a meal with their families, grandchildren, and friends at a participating restaurant without the burden of the expense associated with going out to eat. With today's economy, most seniors are on a limited income, and eating at a restaurant, has become no longer an option for them. This program gives that option back to them. Therefore, improving and maintaining their dignity and self worth.

All seniors are at risk in our communities, even the busy seniors don't eat right. It is up to us as their advocates to try our best to address and implement programs to meet the senior's nutritional needs in our communities. This program addresses that need.

How the Restaurant Process works:

First you talk with a local restaurant to see if they would be interested in participating in the program.

The program works with the Restaurant owner/management to use their existing senior menu and/or create a senior menu with the assistance of a Registered Dietician. The Registered Dietician reviews, adjusts, and approves the senior menu that will meet the states DRI requirements. The restaurant also has the option to utilize a menu that has already been approved by the RD. So there are different options available.

Currently, the Restaurants that are participating in the program vary their hours from 10am to 6pm with available week-end hours. This allows the seniors more flexibility to participate in a nutrition program that otherwise was not available to them.

As a Provider of the Program, it is up to you and the Restaurant to decide on the details outlined in the RFP process. Once agreements have been made between the provider and the restaurant then an agreement/contract will be signed.

Once a contract is signed, then you need to market the program and decide a location and the date the vouchers will be issued. The Provider schedules a distribution date to deliver the vouchers to the participants once a month.

The participants will receive a booklet of 20 vouchers for the month. They will use the vouchers throughout the month. The vouchers are only good for that current month only.

At distribution, Pictured ID is required to prove age and residency. Every client is to complete an intake, and nutrition risk assessment. You are to provide them one piece of nutrition education at the time of distribution. If available, provide them a list of the future distribution locations and times. Provide the lock box for the donations and let them know the suggested donation. Explain how to use the vouchers.

5240 Fountain Drive ● Crown Point, IN 46307

Ph: 219.794-1829 ● Toll-Free: 800-826-7871 ● Fax: 219-794-1860 ● TTY: 888.814.7597

An Equal Opportunity Employer





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

The seniors meet at the restaurant, and inform the waitress that they are part of the senior program. They order from the senior menu, and when it is time to pay, the senior signs the voucher and provides it to the cashier/waitress. Once the cashier/waitress receives the voucher, they are to review the voucher for the following:

1. The senior's signature on the voucher.
2. Ensure that the voucher is being used during the current month.
3. Then the restaurant's employee initials and dates the voucher.

Then the provider on the agreed times per contract will collect the vouchers, transfers them to a roster, and intake forms, nutrition risk forms, daily report forms, and rosters are to be uploaded to the nutrition staff.

Questions and Answers:

Who are the current restaurants?

Currently Sunrise Restaurant in Whiting and Niko's Restaurant in Highland participate in the Restaurant Voucher Program.

Is the current Restaurant Voucher Program viable?

The program covers its operating costs and the provider has not needed to identify additional funding to operate the program.

Are there separate dollars to support the Restaurant Voucher Program or are these the same dollars that support the current Congregate Meal Sites?

The Restaurant Voucher Program is funded through the same Title III C program as Congregate Meals. NWICA will consider all proposals for Nutrition Services and based on multiple factors, including historical service data and proposed costs, establish contracts that will serve the most seniors for the dollars available.

Can a program participant receive both Congregate Meals and Restaurant Vouchers?

At this time, participants cannot receive both services in the same month. If a participant is issued Restaurant Vouchers for the month, they will need to wait until the following month to participate in the traditional Congregate Meal Site program. Our experience has been that seniors generally choose one or the other program.

Can the number of vouchers issued to an individual be flexible?





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

Currently, providers issue booklets containing 20 vouchers. The participant has one full calendar month in which to use those 20 vouchers. NWICA will consider the possibility of issuing smaller books of vouchers and will issue a determination prior to the July 1 contract start date.

The published deadline for Restaurant Voucher Management is February 17, 2012. There is no way we can pull this program together that quickly. Is there a possibility of extension?

NWICA will extend the deadline only for the Restaurant Voucher Program until March 24, 2012.

4. Nutrition Program Planning and Approval Process

Anna Schoon, Director of Planning and Development

Notes: NWICA is adding the opportunity for an additional step in the contracting process. We have had consistent feedback that certain Congregate Meal Sites have low customer satisfaction with meal quality. In order to help address this, NWICA would like to offer any Congregate Provider who is interested, the opportunity to meet each of NWICA's approved caterers, sample their food, and negotiate a catering relationship. NWICA will still manage the contract and payment to the caterer, but Congregate Meal Sites could have more say in who provides their food. If you are interested in this option, please indicate your interest in the Congregate Meal Site Management proposal narrative question 1.

Questions and Answers:

The caterer fair is being offered after unit rates are being proposed. The outcome of the caterer fair will have an impact on unit rates. How will this be accommodated?

NWICA will negotiate with each provider once all the details of catering relationships have been determined.

5. Q and A

Does the caterer's contract include a timeframe for food holding?

Yes. Caterers are required to meet food safety guidelines as stated in the Indiana Retail Food Establishment Guidelines.

How do you want us to propose unit rates?

We want you to tell what you're going to charge us. We certainly want our providers to be financially stable and we want to do everything we can to ensure that providers don't lose money providing services to NWICA customers. NWICA needs to provide services to as many eligible consumers as possible, and certainly lower unit rates help us do that.

NWICA is the only Area Agency on Aging that we work with that doesn't offer us the opportunity to do a cost of living adjustment annually. That means that we have to project food costs and fuel costs for two

5240 Fountain Drive • Crown Point, IN 46307

Ph: 219.794-1829 • Toll-Free: 800-826-7871 • Fax: 219-794-1860 • TTY: 888.814.7597

An Equal Opportunity Employer





NORTHWEST INDIANA COMMUNITY ACTION

Area One Agency on Aging and Community Action Agency

years and results in a higher unit rate in our proposal. Is there a possibility that NWICA could offer the opportunity for caterers to do a cost of living adjustment in non-contract years?

NWICA is certainly willing to consider this. We will talk with some other Area Agencies to learn how they manage the process.

There appear to be some errors on page 1 of the Meal Prep and Catering Request for Proposals.

These items have been corrected and a new RFP has been uploaded to the website.

