

TO: Potential Proposers

FROM: Montana Department of Public Health and Human Services
Disability Services Division
Developmental Disabilities Program

SUBJECT: Request for Proposals for Services

DATE: April 3, 2007

The State Of Montana, Department of Public Health and Human Services (Department), is seeking interested entities to provide in communities throughout Montana the following services for persons with developmental disabilities.

- 1) information services: Family Support Specialist information network (FSSIN) and training information and resources center (TRIC);
- 2) evaluation and diagnosis; and
- 3) specialized services in nursing facilities (PASARR).

Each of these services are to be provided through separate contract with the Department's Developmental Disabilities Program (DDP). The contracts are to be awarded on a competitive basis through a Request for Proposals process as required by 45 CFR Part 92 Subsection 92.36© & (d), 45 CFR Part 74 Subsections 74.43 and 74.44 and the Department of Public Health and Human Services policy published June 1, 1998.

The term for delivery of the contracted services will be from July 1, 2007 to June 30, 2008. Three one-year extensions of the contract may be available pending satisfactory performance during the initial term. The Request for Proposals (RFP) is attached and contains the information necessary for participating in the competitive process for selection of a contractor.

The Department has issued a notice requesting any party interested in providing one or more of these services notify in the manner requested the DDP by 5:00 pm on March 30, 2007 of the intent to submit a proposal or proposals in response to this request for proposals.

REQUEST FOR PROPOSALS
DEPARTMENT OF PUBLIC HEALTH AND HUMAN SERVICES
DISABILITY SERVICES DIVISION
DEVELOPMENTAL DISABILITIES PROGRAM

TO PROVIDE

EVALUATION & DIAGNOSIS SERVICES,

INFORMATION SERVICES:

FAMILY SUPPORT SPECIALIST INFORMATION NETWORK (FSSIN) AND
TRAINING INFORMATION AND RESOURCES CENTER (TRIC),

AND

SPECIALIZED SERVICES IN NURSING FACILITIES (PASARR).

FOR PERSONS WITH DEVELOPMENTAL DISABILITIES

AND THEIR FAMILIES LIVING IN

COMMUNITIES THROUGHOUT MONTANA

March 2007

REQUEST FOR PROPOSALS

TABLE OF CONTENTS

Section	Description	Page
I.	GOALS OF THIS REQUEST FOR PROPOSALS.....	5
II.	RFP PROCESS GENERAL INFORMATION FOR PROPOSERS.....	5
A.	Compliance with Terms.....	5
B.	RFP Schedule.....	5
C.	Principal State Personnel And Addresses.....	6
D.	Notice Of Intent To Propose.....	7
E.	Submission Of Proposals And Rejection Of Late Proposals.....	7
F.	Withdrawal And Resubmission.....	8
G.	Compliance With The Terms Of This Request For Proposals.....	8
H.	Proposal Format.....	8
I.	Rejection of Submitted Proposal.....	8
J.	Proposer’s Representations And Commitments.....	9
K.	Notice of Ambiguities, Inconsistencies Or Errors.....	9
L.	Interpretations, Corrections Of Or Changes To This RFP.....	10
M.	Proposers’ Conference.....	10
N.	Presentation.....	10
O.	Availability of Proposals.....	10
P.	Questions And Answers And Presentations.....	10
Q.	Public Access And Confidential Information.....	11
R.	Costs Of Developing And Presenting Proposal.....	12
S.	Rights Reserved To The Department.....	12
III.	SYSTEM OVERVIEW.....	13
A.	SERVICE OVERVIEW.....	13
B.	Regulations.....	15
C.	Philosophy.....	15
IV.	MINIMUM PROPOSAL REQUIREMENTS.....	16
A.	Introduction.....	16
B.	Administrative Description.....	17
C.	Community Integration And Support.....	18
D.	Evaluation And Diagnosis Services.....	18
E.	Pasarr/MR.....	19
F.	Information Services.....	20
G.	Financial Information.....	23
H.	Local Government Participation.....	23
V.	INFORMATION ON CONTRACTUAL TERMS.....	24

A.	Contract Provisions	24
B.	Consideration and Payments	24
C.	Incorporations in Contract	24
D.	Subcontracting	24
E.	Indemnification	25
F.	Insurance Requirements	25
G.	Additional Contractual Requirements	25
H.	Availability of Funds	25
I.	Assignment, Transfer, and Subcontracting	26
J.	Contract Amendments	26
K.	Contract Extension	26
L.	Montana Law	26
M.	Venue	26
N.	Costs of Litigation	26
VI.	CONTENTS AND FORMAT OF PROPOSAL	27
A.	Contents	27
B.	Summary	27
C.	Description Of Service Delivery	27
D.	Administration	27
E.	Experience	28
F.	Resources/Supports	28
G.	Financial Management and Information	28
H.	Assurances	28
I.	Attachments	30
J.	Proposal Index	30
VI.	SELECTION PROCESS	30
A.	General Process	30
VIII.	EVALUATION PROCESS	31
A.	Evaluation Criteria	31
B.	Selection Criteria	31
C.	Information On Past Performances And Other Matters	32
D.	Proposal Evaluation Committee	32
E.	Decision	33
F.	Notice Letters	33
IX.	ENTERING INTO A CONTRACT	34
A.	Awarding of Contract	34
B.	Process	34
C.	Submission of Necessary Certificates and Forms	34
X.	ATTACHMENTS	36

ATTACHMENT A -CONTRACT 37

ATTACHMENT B - APPENDICES 38

APPENDIX A – INFORMATION SERVICES: FSSIN/TRIC 39

APPENDIX B - EVALUATION AND DIAGNOSIS 53

APPENDIX C - PASARR/MR 59

ATTACHMENT C - NUMBERS, SERVICES AND LOCATIONS 67

ATTACHMENT D - FEDERAL ASSURANCES 73

ATTACHMENT E - CONTRACTING GUIDELINES 77

RFP LEGAL NOTICE FOR NEWSPAPERS AND WEBSITE 78

I. GOALS OF THIS REQUEST FOR PROPOSALS

The services to be contracted for include

- Information services: Family Support Specialist information network (FSSIN), training information and resources (TRIC),
- evaluation & diagnosis,
- and
- specialized services in nursing facilities(PASARR).

A detailed description of the services to be provided appears in Section II. These services, the number of persons currently in these services and the location of service provision are detailed in Section VIII.

Funds available are those appropriated by the Montana legislature. These services may be funded from the State General Fund, Medicaid under the Home and Community Based Waiver, Medicaid Targeted Case Management and Part C Early Childhood Education funds. The mix of funds is dependent upon the services being provided and the eligibility of the persons being served. The contractor is expected to meet all requirements of any funding source.

Any entity which has or can demonstrate the ability to deliver one or more of the fiscal and requested services and meet system requirements may submit a proposal or proposals to provide one or more of the services as specified in this RFP.

The term of the contracts is to be for a period of one year and will be in effect from July 1, 2007 through June 30, 2008. The contract may be extended for three (3) one (1) year periods if the parties agree to the extension and any necessary changes by prior to the end of the contracting period.

II. RFP PROCESS GENERAL INFORMATION FOR PROPOSERS

A. Compliance with Terms

Compliance with the terms of the RFP is necessary for the submission of a responsive proposal and for the performance of any of the proposed contracts.

The RFP contains the instructions governing the proposals to be submitted, the descriptions of the tasks to be performed, and the requirements necessary to undertake performance. The Department, acting through an evaluation committee and other personnel, will determine a proposer's compliance with the requirements of the RFP.

B. RFP Schedule

THE SPECIFIC DATES BY WHICH CERTAIN ACTIVITIES OR UPON WHICH CERTAIN EVENTS ARE TO OCCUR MUST BE SPECIFIED IN THIS PROVISION.

The following is the 2007 schedule of events for implementation of this RFP.

- 1) issue RFP - March 19;
- 2) notice of intent to propose due from potential proposers - March 30;
- 3) written questions due - April 6;
- 4) written answers distributed - April 13;
- 5) proposals due - April 19 at 5:00pm; and
- 6) intended contract award - May 14.

The department within its discretion may change any or all of the dates specified in this provision.

C. Principal State Personnel And Addresses

The procurement official responsible for the conduct of this RFP process is:

Jackie Emerson
Developmental Disabilities Program
Disability Services Division
Department of Public Health and Human Services
111 Sanders, Room 305
P.O. Box 4210
Helena, MT 59604-4210
Telephone: (406) 444-2995
Fax: (406) 444-0230;
E-mail: jemerson@mt.gov

Any and all communications of any proposer with the Department relating to this RFP must be directed to the procurement official.

The program staff that is the liaison for the purpose of administering the contract to be entered into is:

Chet Williams
Developmental Disabilities Program
Disability Services Division
Department of Public Health and Human Services
111 Sanders, Room 305
P.O. Box 4210
Helena, MT 59604-4210

Telephone: (406) 444-2995
Fax: (406) 444-0230;
E-mail: cwilliams@mt.gov

D. Notice Of Intent To Propose

The Department has initiated this request for proposals process through a published and distributed notice requesting that entities that intend to submit a proposal or proposals in response to this RFP give notice to the Department of that intent by 5:00 pm on March 30, 2007.

That notice requires a potential proposer to submit a notice to the Department of intent to propose. The notice must provide the proposer's full name, business purpose and address, expressly state the intention to submit a proposal, and denote which services for which a proposal or proposals will be submitted. The notice must clearly identify this RFP. Failure to submit a notice of intent to propose disqualifies a potential proposer from submitting any proposal.

E. Submission Of Proposals And Rejection Of Late Proposals

A proposer must submit its proposal as directed in this RFP.

A proposer must submit separate proposals for each type of service that it may desire to deliver.(FSSIN and TRIC together will comprise one type of service.)

A proposal must be received in its entirety no later than **April 19 by 5:00 pm.**

A proposal must be directed and addressed to the procurement official specified in Subsection C of this section.

A proposal must be submitted by mail or personal delivery. All pages of a proposal submitted by fax must be received by the required date and time. Submission by e-mail is not permitted.

A proposal must include a statement identifying this RFP request with specificity and any subsequent addenda to this RFP.

6 copies of a proposal must be submitted.

The proposer is solely responsible for the timely delivery of the proposer's proposal. The Department does not waive delivery requirements due to failings in the mode of delivery selected by the proposer.

A proposal received after the date and time specified for submission of proposals is not

accepted for consideration regardless of cause. A submitted proposal for which not all pages or attached materials are present at the date and time specified for submission of proposals is not accepted for consideration regardless of cause.

A late proposal is destroyed unless the proposer requests return of the proposal and agrees to pay the costs involved.

F. Withdrawal And Resubmission

A proposer may withdraw a proposal at anytime prior to the date and time the Department designates for the submittal of proposals. A proposal withdrawn prior to the date and time may be resubmitted in a modified form if done so within the time period allowed for submittal of proposals.

G. Compliance With The Terms Of This Request For Proposals

This RFP contains the instructions governing the submission of a proposal, the descriptions of the tasks to be performed, and the requirements necessary to undertake performance. The Department, acting through the designated procurement official, an evaluation committee, a division administrator and other personnel, determines a proposer's compliance with the requirements of this RFP.

The Department, in its discretion, may request:

- 1) further information, clarification or correction of obvious mistakes from any and all proposers at any stage in the RFP process,
- 2) a proposer to correct obvious mistakes or provide needed clarifications in a proposal either before or after the date for submittal.

A proposer may not unilaterally make changes in a submitted proposal after the date for submittal has passed except that the Department may allow, in its discretion, for changes to correct obvious, inconsequential mistakes or inconsistencies.

H. Proposal Format

A proposal must be written in a legible type, be organized by sections in accordance with this RFP, have numbered pages, and have a table of contents.

I. Rejection of A Submitted Proposal As Nonresponsive

The Department may reject any proposal that it determines fails to meet one or more of the requirements of the RFP, is not in the best interests of the Department or that is in any manner incomplete or irregular.

A proposal must meet basic requirements for delivery of services in order to be considered in the selection process.

A proposal may be found nonresponsive at any time during the selection process. Once a proposal is determined to be nonresponsive no further consideration is given in the selection process to that proposal.

The Department will reject as nonresponsive any proposal when the cost is determined by the Department to be unrealistically low.

A proposal also may be found nonresponsive if it fails to meet the basic criteria for delivery of services. The basic criteria for delivery of services may include but is not limited to: performance of certain services by certain types of professionals or by persons with specified experience; possession of all requisite corporate and individual licensure, certification and other legally necessary requirements and approvals; requisite staffing and facility development and location for delivery to specified consumer populations or geographical areas; and a maximum limit to the costs of performance.

The Department, in evaluating the submitted proposals, first determines whether a proposal is responsive. A proposal may be rejected as nonresponsive and may receive no further consideration, if it: 1) is not presented substantively in the required format, 2) does not contain all the requested information, 3) contains clearly erroneous information, or 4) is deficient in any respect.

J. Proposer's Representations And Commitments

A proposer by submitting a proposal for consideration represents that this RFP has been read and is fully understood and that the submitted proposal is based upon the Proposer's understanding of the specifications, tasks and requirements described in this RFP.

This request for proposals along with the proposer's response to the RFP is to be incorporated into and made a part of the contract. Consequently, the provisions of this RFP and the Contractor's proposal are to be binding upon the Contractor.

The proposer by submitting a proposal agrees that, if it receives and accepts an offer to contract from the Department, it is to be bound by the terms of this RFP, the proposer's response to the RFP and the Department's contract along with any attachments to those documents.

A proposer further represents that it has the ability to deliver the services specified, to perform the tasks and responsibilities in accordance with the time lines presented in this RFP, and to deliver the services at no more than the costs specified in the Department's contract and the proposer's proposal.

K. Notice of Ambiguities, Inconsistencies Or Errors

Notice of any possible ambiguity, inconsistency or error in the RFP discovered by a proposer must be provided in writing to the Department's procurement official for this RFP prior to or at the time of the final date for the submittal of written questions.

L. Interpretations, Corrections Of Or Changes To This RFP

Any interpretation, correction of or change to this RFP made by the Department is to be made by written addendum. Any information provided or received in any other manner that purports to interpret, correct or change this RFP is not binding and may not be relied upon.

Any information received by a proposer that does not originate with the procurement official, is not in writing or is not shared with all proposers is not official, is not part of this RFP and may not be relied upon.

M. Proposers' Conference

A proposers' conference may be held at the discretion of the Department to provide parties interested in submitting proposals the opportunity to seek clarifications from the Department about the process and services.

A proposers' conference will be held if warranted. The decision to hold a conference will be made if more than one proposer indicates a need for such by April 4, 2007. If the need is indicated, the conference will be held on April 6, 2007 at a time and place to be announced.

Any party interested in potentially providing the services to be contracted for may attend the proposers' conference.

N. Presentation

Presentations may be required at a time and place designated by the Department.

O. Availability of Proposals

All proposals will be available for inspection during regular business hours. Please contact the Department's officer responsible for the conduct of this request for proposal process for further details.

P. Questions And Answers And Presentations

Proposers may submit written questions concerning the RFP process and the services to be provided. Written questions must be submitted by the due date for submittal of written questions. Questions submitted to the Department are to be in writing and directed and addressed to the procurement official as specified in Section C. The Department responds in writing to written questions and to questions received at the proposer's conference, if held.

The questions and answers are distributed to those entities that have requested this RFP by the date specified in Subsection B of this Section.

Oral questions, other than those presented at the proposer's conference, if held, are not accepted.

Q. Public Access And Confidential Information

1. Public Access

A proposal, inclusive of the information within and attached to the proposal, is submitted for the purpose of evaluation and, if the proposer is successful, is then incorporated into the contract as one of the principal features defining and governing performance. Upon entry into a contractual relationship, the Department has the right to use or disclose the proposal and related information to any extent required by law.

All proposals and other information received in response to this RFP are available to the public, except for trade secrets as defined by the Uniform Trade Secrets Act, Title 30, Chapter 14, Part 4, MCA, corporate financial information, matters of personal privacy, and other confidential information as recognized in Montana law.

All proposals are available for inspection during regular business hours. Please contact the procurement official for further details.

The proposer's conference, if held, and the meeting of the evaluation committee are open to the public for observation.

2. Submission Of Confidential Information

Proposers are discouraged from submitting information for which there is a claim of confidentiality unless it is considered essential for proper evaluation of the application. The Department may not be able to enter into a contract with a proposer, if the proposer has claimed that proposal information is confidential, since the information is likely to be considered public information under Montana law.

The Department rejects as nonresponsive any proposal for which there is a claim of confidentiality for the proposed costs of service delivery or other information that is commonly recognized by the law to not be confidential in nature or, if recognized as confidential, is commonly available to the public based on the public interest in the right to know.

Upon receipt, proposal information is disclosed only to persons participating in the evaluation or contracting process until the proposal has been reviewed and all marked confidential information has been removed. After this review, all remaining proposal materials are open

for public inspection and copying. Material marked as confidential may be released at a later date if it is determined that the material is not confidential or that, even if the material is confidential, the public interest in the right to know outweighs the confidentiality interest. In addition, the Department may release any information for which there is a claim of confidentiality, if the information is available to the public without restriction from another source or has been released to the public otherwise by the proposer.

In order for a proposer to claim that information presented in the proposal is confidential, the following conditions must be met:

- 1) Information for which confidentiality is claimed must be clearly marked and separated from the rest of the proposal.
- 2) An affidavit from the proposer's legal counsel attesting to and explaining the claim of privacy for the information must be attached to the proposal.
- 3) A proposer making any claim for protection of information in a proposal as confidential must indemnify the Department in writing for the retention and costs of legal counsel and all other legal costs and fees necessary for and related to any defense of the claim of privacy.

Documents not meeting all of the requirements for protection from release based on confidentiality are available for public inspection, including copyrighted materials.

R. Costs Of Developing And Presenting Proposal

The cost of developing and presenting a response to this RFP is entirely the responsibility of the proposer and is not reimbursable by the Department.

S. Rights Reserved To The Department

While the Department intends to award a contract, issuance of this RFP and the conduct of the selection process is a discretionary act and does not commit the Department to the award of a contract.

The Department reserves the right to:

- 1) cancel or terminate this RFP process at any time;
- 2) communicate or negotiate at any time with one or more proposers;
- 3) request one or more proposers to clarify their proposal or to supply any additional material deemed necessary to assist in consideration of the proposal;
- 4) reject any or all proposals received; and
- 5) waive any procedural or substantive requirement of this RFP which it determines does not substantively impact in a negative way this RFP process or any or all of the proposers.

The right of the Department to waive a requirement of this RFP does not afford a proposer the right to unilaterally fail to comply with a requirement or to obtain a waiver of a requirement.

III. SYSTEM OVERVIEW

State of Montana's Developmental Disabilities Service System

The State of Montana purchases a variety of services for its citizens with developmental disabilities and their families in communities throughout Montana.

A belief in human dignity, that each person is unique and capable of development, is a cornerstone for the Montana Developmental Disabilities Program. Montana's direction for providing services to persons with developmental disabilities calls for more normal and less institutional program settings, integration with non-handicapped persons, and individual participation in decisions concerning their lives.

A. SERVICE OVERVIEW

This service overview section provides a general description of the DDP services to be purchased.

The specific information regarding the development, operation and funding of the services is intended to assist proposers in preparing responsive proposals. Requirements for the provision of services are also found in the master contract, related contract appendices and the applicable laws, rules, regulations, policies and the contracting guidelines.

INFORMATION SERVICES: (FSSIN AND TRIC SERVICES SHOULD BE INCORPORATED INTO ONE PROPOSAL)

FAMILY SUPPORT SERVICES INFORMATION NETWORK (FSSIN): This service provides a website and an automated database for referral to appropriate services for persons with disabilities and their families.

TRAINING RESOURCE AND INFORMATION CENTER (TRIC): The Training Resource and Information Center is a website and specialized lending library and resource assistance service. The library's collection focuses on the various aspects of developmental disabilities. The collection covers topics ranging from academic to vocational training and includes formats such as books, curriculum packages, audio-visuals and journals. Books with high interest and lower reading skill are available. Researching for possible materials and locating the materials, often through inter-library loan is done to maximize assistance. Materials are geared to a variety of levels of interest and expertise. Provision of good services and maintaining excellent customer relations is critical to this service.

The intended patrons are persons with developmental disabilities and persons who work or live with persons with developmental disabilities in Montana. Anyone who resides in Montana is eligible to use the resources. Priority is given to those service corporations funded through the Developmental Disabilities Program.

The detailed requirements for the Information Services: Family Support Services Information Network (FSSIN) and Training Resource and Information Center (TRIC) contract can be found in Appendix A.

EVALUATION AND DIAGNOSIS SERVICES: Evaluation and diagnosis services are established to identify the presence/absence of disabling conditions, determine individual deficits, formulate specific recommendations to address those deficits, or select treatment/intervention alternatives. When appropriate, the transdisciplinary evaluation staff should see persons for the purpose of making statements regarding the rate of progress as well as prognosis.

A transdisciplinary team evaluation is defined as an evaluation completed by a team of experts from a variety of disciplines. The composition of a team may vary in the disciplines represented according to the unique needs of the consumer and family. The participation of the consumer's family in the team may vary according to the family's preference.

An evaluation is defined as a process to: 1) determine whether the diagnosis of a delay or disability is present; 2) determine strengths and deficits; 3) determine a consumer's initial or continuing eligibility for services; and 4) develop referral and/or consumer and family program recommendations.

The detailed requirements for the Evaluation and Diagnosis services contract can be found in Appendix B.

PASARR/MR EVALUATION AND SPECIALIZED SERVICES: The Pre-Admission Screening and Annual Resident Review (PASARR) services are provided for persons who may have developmental disabilities, and who are seeking admission to, or residing in, nursing facilities in Montana. Specialized services must be provided to nursing facility residents who have been found to require these services through the PASARR/MR screening process. These services must be provided in accordance with the federal PASARR rules and the Omnibus Budget Reconciliation Act (OBRA) of 1987. PASARR/MR Evaluation and Specialized Services include:

- 1) **Pre-Admission Screens:**
Each person applying for placement in a nursing facility, who is suspected of having a developmental disability, must receive an Initial Level II pre-admission screen. This screen must be completed within an annual average of 7 working days, and includes a face-to-face interview, gathering assessment information, and

preparing written narrative reports. The purpose of the screen is to determine: 1) if the person has a developmental disability; 2) if the person meets the level of care for a nursing facility; and 3) if the person requires specialized services, and to identify the needed services.

2) **Subsequent Screen and/or Specialized Service Assessment:**

A subsequent screen may be required for a person who has previously received an Initial Level II preadmission screen, but the situation or condition has changed since the last screen was completed. The purpose of the screen is to determine the appropriate placement for the person, identify needed specialized services, and develop a plan for meeting these needs.

A specialized service assessment may be required for a person who has previously received a Modified Level II pre-admission screen from one of the DD Program's Quality Improvement Specialists. The purpose of the assessment is to identify needed specialized services and develop a plan for meeting these needs.

3) **Annual Resident Reviews:**

Annual Resident Reviews must be completed for each nursing facility resident identified by the Department of Public Health and Human Services as having a developmental disability. The purpose of the review is to determine the appropriateness of continued nursing facility placement, reassess the person's need for specialized services, and develop or modify a specialized service plan for the person.

4) **Specialized Service Supports:**

Specialized service supports must be provided to nursing facility residents requiring and/or requesting these services who are not receiving these services through other contracted services with the Developmental Disabilities Program. A specialized services coordinator will develop a specialized services plan for the person with the involvement of the person's family and the nursing facilities staff. The coordinator will promote the most appropriate placement for the person, assist in the development of the nursing facility's plan of care, monitor the status of the specialized service plan, and manage limited support services funds for special needs.

The detailed requirements for this service contract can be found in Appendix C.

B. Regulations

The programmatic rules and policies that govern the delivery of developmental disability community services are available upon request.

C. Philosophy

Montana's community services for persons with developmental disabilities are guided by a set of fundamental principles and basic assumptions. Among these assumptions are:

- 1) All persons are capable of learning something.
- 2) Learning is primarily a function of the characteristics of a person's living and working environment.
- 3) The best way to change inappropriate behaviors is to teach and reinforce appropriate behaviors. Behavioral intervention strategies must recognize the dignity and rights of the person and use the least intrusive and least restrictive means possible to change behavior.
- 4) Persons exposed to normal patterns of daily life at home, at work, and in the community, are more likely to develop culturally appropriate, acceptable and valued behaviors.
- 5) Gainful employment in the community is more desirable than employment in isolated day programs.
- 6) Persons should be integrated in, rather than isolated from, the communities in which they reside.
- 7) Training is one aspect of service delivery. Other aspects include a safe homelike environment, supervision when it is required, recreation and leisure activities, good food, clean well-fitting and appropriate clothing, the dignity of risk, freedom to make choices, community integration, social support, and friends.

Good services are characterized by a balance among all these elements, allowing each person the opportunity to exercise his or her fundamental rights.

The principles above **should** be considered when developing a service proposal, and **must** be adhered to in the provision of services

IV. MINIMUM PROPOSAL REQUIREMENTS

A. Introduction

This section is a key component of this RFP. Final selection of the successful proposer will be based to a large degree on an evaluation of the material called for in this Section. **All proposals must provide at a minimum the information called for in this section. The information that must be included varies depending on the service(s) that the proposer is seeking to provide. The headings for each of the components in this**

section indicate in parenthesis when the information must be included in any given proposal. In addition to the specific information requested in this section and discussed above, proposers should address how their proposal will meet service provision requirements outlined in the master contract, contract appendices and administrative rules. Proposers may and should provide other material and information to strengthen the case for final selection of their proposal.

B. Administrative Description (all proposals)

A sound administrative and delivery capacity is essential to the success of service delivery. Describe in detail the administrative structure and capacity to deliver of the proposer. Include the following information:

- 1) the name(s) of the party or corporation submitting the proposal; physical address, telephone number, fax number and e-mail address of the applicant or the organization's corporate office and the name of the director or chief executive;
- 2) employer identification number (EIN);
- 3) a list of the management personnel for the corporation providing services including a description of any experiences or skills for overseeing the management of the organization and the delivery of services;
- 4) proof of incorporation or certified statement of government status;
- 5) verification of workers' compensation coverage for any paid program employee;
- 6) a summary of the corporations' history, with emphasis on experience in delivering developmental disabilities services in general, and the service to be provided in particular. To assist in reference checks regarding past history of organization, include names, addresses and phone numbers of persons or organizations;
- 7) an organization chart and narrative describing how the services will be organized and supervised, including a description of the role, function and span of control of administrative components, and the location of each full time equivalent employee in the organization's structure;
- 8) a delineation of the services that will be provided directly by the primary corporations' employees and those that will be provided by other service providers;
- 9) a copy of the agreements made with other providers, ensuring the ready availability of the service at the required levels;
- 10) evidence that the corporation has strong ties to the communities in which services will be provided;

- 11) the corporations' mission statements;
- 12) a statement of the principles that guide the organizations' delivery of services;

C. Community Integration And Support (all proposals)

Describe in detail the involvement in, and commitment to, the organization by local community leaders. Proposers that are for-profit organizations, other than contractors of transportation only, must have a local community advisory board. Include the following information:

- 1) evidence that local government, business, professional and education leaders understand and actively support the services;
- 2) if constructing or obtaining a new service site, an awareness and education plan that outlines the steps to be taken to help further neighborhood acceptance of the services;
- 3) an itemized list of any assets, services, or funds to be contributed by the local community to supplement the cost of operation; and
- 4) evidence of the level of consumer satisfaction with the performance of your organization, particularly in the delivery of the services you are proposing to provide.

D. Evaluation And Diagnosis Services (E&D proposals only)

Describe in detail the services to be provided. Include information which specifies how all requirements in Appendix B will be met.

Include the following information:

- 1) a detailed description of the type and amount of services to be provided;
- 2) the proposed service delivery system including a description of how services are made available;
- 3) a description of the type and amount of ongoing consultation services available to persons and their families;
- 4) a description of the agency's system to ensure coordination between all agencies and professionals involved in delivering support services to the person and family;
- 5) a description of staff qualifications that will assure the delivery of high quality services to persons and their families;

- 6) how the agency assures that service delivery is family centered, including a description of the areas in which families are the primary decision makers;
- 7) the agency's consumer satisfaction evaluation process;
- 8) the agency's public awareness program;
- 9) the agency's system for finding persons in need of services;
- 10) the agency's system for allowing a person's right to voice concerns regarding service delivery;
- 11) interagency service agreements which support coordination of services with schools, public health services, DDP child and family service contractors, adult service contractors, and other appropriate agencies;
- 12) the agency's system for tracking data on all persons served, including information that assures the system has the capacity to respond in a timely fashion to data requests from the Division;
- 13) how the agency assures that all facilities used in the provision of services, other than a family's home, meet all applicable licensure requirements and health and safety codes; and
- 14) how the agency assures that transportation services provided, if any, are safe and meet applicable standards.

E. Pasarr/MR Evaluation & Specialized Service Support (PASARR proposals only)

Describe in detail how the PASARR/MR Screening and Specialized Service Supports, as presented in Appendix C of Attachment B, are to be provided to persons with developmental disabilities who are residing in, or seeking admission to nursing facilities. Provide the following information:

- 1) A brief history of the corporation's role as a provider of case management and related services. Describe your experience with respect to coordinating with other medical and social service providers in your area;
- 2) A description of how the PASARR/MR Evaluation and Specialized Service Supports will be coordinated for a specific geographical area. Assure the required time lines for completing screens, an average of 7 to 9 working days, can be met;
- 3) A description of how the corporation will monitor the services performed. What criteria will be used to ensure the quality of service provision, compliance with

time lines, and budget limitations;

- 4) A description of how the corporation will ensure the staff are familiar with contract requirements, procedures and policies;
- 5) A description of how the corporation will ensure a timely review by a licensed, masters degree psychologist, of all reports verifying diagnoses of mental retardation and related conditions; and
- 6) A description of how the corporation will ensure provision of on-going specialized service support and facilitation and monitoring of specialized service plans for persons residing in nursing facilities for a specific geographic area.

F. Information Services (include both FSSIN and TRIC in Information Services proposal)

Family Support Services Information Network Directory (FSSIN)

Describe how the central directory of services as presented in Appendix A of Attachment B is to provide information and referral to appropriate services for persons with disabilities and their families. Include the following information:

- 1) a description of a website/an automated database for referral to appropriate services for children with disabilities and their families;
- 2) a description of staff, their qualifications and their ability to answer incoming inquiries;
- 3) a description of accessibility through an 800 number and website;
- 4) a detailed description of an ongoing public awareness effort to continuously foster statewide knowledge of available services and appropriate referrals; and
- 5) a description of the methods for measuring the ongoing effectiveness of the information network.

Training Resource and Information Center (TRIC)

Describe in detail how TRIC services, as presented in Appendix A of Attachment B, will be made available. Maximum user support and assistance is highly valued. A high quality of service is critical. Include a description of:

- 1) how materials and information are accessed from all areas of the State through any electronic/website means, mail, delivery services, and walk-ins. Include days of the week and hours of the day that the center will be open;
- 2) the purchasing procedures to be used for materials including renewal of

- subscriptions;
- 3) the cataloging system to be used;
 - 4) the review process to provide information to patrons about the materials, their content, suitability for different populations, best uses, etc.;
 - 5) the circulation system to be used including response time to different kinds of requests;
 - 6) check-out policies regarding:
 - a) amount of material able to be checked out at one time;
 - b) length of time material may be checked out, overdue and reservation policies;
 - c) policy regarding lost materials;
 - d) kind and quantity of materials, including copies of articles, available free of charge; and
 - e) who pays for postage and mailing insurance for different kinds of items.
 - 7) how literature searches will be done, including electronic/website if available, and any policies relating to these searches;
 - 8) the inter-library loan procedure which will be used. Include any agreements necessary which indicate assurances of this service at no cost to patrons;
 - 9) the frequency with which bibliographies will be made available including requests for specific topics;
 - 10) the annual reports to be provided to the Division regarding materials held, new materials purchased, and usage by category of materials, patrons, geographical location, etc.;
 - 11) manner in which presentations about available services will be made at the annual Statewide Developmental Disabilities Conference or other forums;
 - 12) how equipment will be made available for use at annual Developmental Disabilities Conference;
 - 13) an advisory committee to be formed to ensure needs of the developmental disabilities system are being met including services to be provided, review of

materials, materials to be purchased, materials to be removed;

- 14) a strategy to identify the strengths and weaknesses of the collection and the operating procedures;
- 15) the means to determine information needs of service system members;
- 16) means to obtain additional materials to update and expand the collection through alternate sources such as grants;
- 17) an ongoing awareness effort to continuously foster statewide knowledge of the available services;
- 18) the methods for measuring the ongoing effectiveness of the service and level of customer satisfaction;
- 19) regular newsletter available to patrons to provide information about new materials and items of interest;
- 20) the staff ability to answer incoming inquiries, maintain accountability for materials and interact with service system to meet informational needs;
- 21) how many persons with developmental disabilities will be involved as employees or volunteers. Describe the supervision and training to be provided. If another agency will be providing the supervision and training, include a letter of agreement detailing the arrangements with that agency;
- 22) how the use of other volunteers will be explored;
- 23) the type and amount of staff training that will be provided and a description of how that training will be delivered, including the type and amount of:
 - a) pre-service training provided to new employees and
 - b) ongoing in-service training for any employees;
- 24) the facility including size, protection against disasters, accessibility, parking and ease of use;
- 25) how all equipment, books, materials will be moved from current location. (No start-up resources are available to assist in this process);
- 26) the computer equipment both hardware and software and its capability;
- 27) the current level of involvement with the intended patrons including the service

corporations funded by the Developmental Disabilities Program and other persons who work or live with persons with developmental disabilities in Montana; and

- 28) the current involvement with similar library and resource agencies. If future involvement is foreseen describe the involvement. Include copies of agreements with agencies that you currently have or which will support your efforts in providing services as described in this RFP.

G. Financial Information (include in all proposals)

In order to ensure that expenditure information is in a consistent and readily interpretable form across all proposals, each proposer must submit a proposed annual budget that details how monies are to be allocated to assure appropriate performance of services.

All expenditures must be reasonable and allowable and are not to exceed revenue available.

Federal cost principles are used to determine whether contract costs are reasonable or allowable.

Provide in detail the following information regarding the financial operation of the corporation:

- 1) a description of the financial management plan, accounting practices and billing practices;
- 2) evidence that the proposer has, or can secure, sufficient working capital to maintain a positive cash flow;
- 3) the estimated total amount of capital expenditures to be financed, including as a separate item if needed, an estimate of the cost of group home construction;
- 4) a written commitment from a lending agency to provide the necessary capital financing or, if no agreement exists, an indication in writing from a lending agency that a strong likelihood of financing exists;
- 5) a description of the general terms of any existing or proposed capital financing arrangement; and
- 6) The name, address and phone number of the financial officer or other responsible fiscal person designated by the applicant organization.

H. Local Government Participation (include in all proposals)

Please answer the following questions regarding the level of ongoing and one-time financial support that local government is willing to contribute towards the program's operation:

- 1) Is any local government entity able to provide one-time contributions of public funds towards the delivery of services? If so, how much?
- 2) Is any local government entity able to provide any real property or equipment to support the development and delivery of services? If so, how much?

V. INFORMATION ON CONTRACTUAL TERMS

A. Contract Provisions

The successful proposer must agree to the inclusion in the contract of all the contract provisions which are included in the "Attachment A - Contract" attached to this RFP. In addition, further contract provisions may appear in the final contract based upon requirements of applicable federal and state law.

B. Consideration and Payments

Consideration under the contract will be as specified by the Department based upon the available funding for the services and the cost of services as specified by the successful proposer in its proposal or as specified in best and final negotiations between the parties.

The Department within its discretion may change the consideration during the term of the contract due to reductions in federal or state funding for the services, due to changes in responsibilities that were not contemplated at the time of award of the contract, or due to programmatic changes.

Upon any extension of the term of the contract, the Department provides no assurances that consideration would be increased at that time as requested by the contractor to cover increased costs.

Invoicing will be done in accordance with the practices of the Department.

See the "Consideration and Payments" provision in the "Contract".

C. Incorporations in Contract

The RFP and the accepted proposal, along with any modifications agreed to by the Department, will be attachments to any resulting contract.

D. Subcontracting

The successful proposer will be the prime contractor and will be responsible in total for all work performed under the contract. The contractor may not subcontract without the approval of the Department. All intended subcontractors must be listed in the Proposer's proposal.

The successful proposer is responsible to the Department for the acts and omissions of all subcontractors and of persons directly or indirectly employed by subcontractors, and for the acts and omissions of persons employed directly by the Proposer.

Nothing contained within this document or any contract documents derived from this document will be considered to create any contractual relationship between any subcontractor and the Department.

See the "Assignment, transfer and subcontracting" and "Indemnification" provisions in the "Contract".

E. Indemnification

The Contractor will be required to indemnify the State of Montana in relation to legal liabilities that may arise in the performance under the contract.

See the "Indemnification" provision in the "Contract".

F. Insurance Requirements

The Contractor will be required to maintain at all times during the term of the contract the types of insurance and the amounts of coverage specified in the contract.

See the "Insurance" provision in the "Contract".

G. Additional Contractual Requirements

The Contractor will be required to comply with all additional requirements of the "Contract" inclusive of the following:

- a) All accounting and audit requirements
- b) All record requirements
- c) All property ownership and management requirements
- d) All labor law requirements
- e) All federal law requirements
- f) All civil rights requirements
- g) All confidentiality of private information requirements

H. Availability of Funds

The Department may unilaterally modify or cancel the contract when it determines that the public and other monies for funding the contract are not currently or in the future will not be available.

See the "Availability of Funds" provision in the "Contract".

I. Assignment, Transfer, and Subcontracting

The contractor may not assign, transfer, or subcontract all or any portion of its duties and responsibilities under the contract without the express written permission of the Department and execution of the documents that are appropriate and necessary for the assignment, transfer, or subcontract.

See the "Assignment, transfer and subcontracting" provision in the "Contract".

J. Contract Amendments

The contract may only be amended by written amendment entered into by both parties.

See the "Scope, amendment and interpretation of contract" provision in the "Contract".

K. Contract Extension

The Department in its discretion determines what extensions, if any, may occur to the contract. Contract extensions may only be extended in accordance with the possible terms of extension provided for in the RFP and the contract.

See the "Term of contract and completion date" provision in the "Contract".

L. Montana Law

Any contract resulting from this RFP must be governed by the laws of only the State of Montana.

See the "Choice of law and venue" provision in the "Contract".

M. Venue

Venue for purposes of litigation relating to the RFP and the contract is Lewis & Clark County.

See the "Choice of law and venue" provision in the "Contract".

N. Costs of Litigation

Each party to the contract must pay its own costs and attorney fees incurred as a result of

litigation relating to the RFP and the contract.

See the "Choice of law and venue" provision in the "Contract".

VI. CONTENTS AND FORMAT OF PROPOSAL

A. Contents

A proposal must contain all of the following elements arranged in the following order:

- 1) Transmittal Letter
- 2) Summary
- 3) Description of Service Delivery
- 4) Administration
- 5) Experience
- 6) Resources/Supports
- 7) Financial Management and Information
- 8) Assurances
- 9) Attachments
- 10) Index

The transmittal letter will transmit the proposal and must identify all material and enclosures being forwarded collectively as a proposal to the RFP.

In addition to any items discussed below, **all information requested in Section III must be included.**

B. Summary

The Summary states the principal features of the proposal. The proposer may call attention to those aspects of proposed performance and its organization that it views as its strengths. The proposer should describe how these services will enhance the range and flexibility of services available to persons with developmental disabilities in the community. The executive summary affords an opportunity for the proposer to call attention to the unique strengths of the proposal which make it worthy of final selection.

C. Description Of Service Delivery

This section provides the proposer's plans for service delivery, including the related matters such as coordination with other entities and quality control measures.

D. Administration

This section provides general information about the administrative features of the

proposer's organization.

E. Experience

This section provides information about the proposer's general background, relevant experience, and qualifications necessary for the effective delivery of the required services.

This section must include, but is not limited to the following:

- 1) A description of the primary purpose or goals of the organization;
- 2) A description of all of the services provided by the applicant or organization, including the locations of service sites;
- 3) Resume of key personnel that may be directly involved with the program/project;
- 4) A narrative describing the proposer's experience as it relates to this project;
- 5) Letters of support for your proposal which should demonstrate familiarity with the specifics of the proposal submitted; and
- 6) Any additional information related to the proposer's organization, personnel, and experience that would substantiate its qualifications and capabilities to perform the services described.

F. Resources/Supports

This section identifies the community and organizational features to be used that are necessary to or complementary to the delivery of services.

This section must include, but is not limited to the following:

- 1) Staff skills, experience and knowledge that support the effective and appropriate delivery of services;
- 2) Other agencies or professionals that would support service delivery;
- 3) Assistance from local government; and
- 4) Computer and software capabilities.

G. Financial Management and Information

This section provides the financial information and practices by which the Department can assess the appropriateness, and cost-effectiveness of the proposed services delivery.

H. Assurances

This section provides the Department with the assurances from the proposer that are necessary so that the proposer's organization is legally and otherwise acceptable as a contractor.

Failure to abide by these assurances during the course of contracting is cause for

termination of the contract by the Department.

1) General Assurances

- a) The proposer assures the Department that it will account for expenditures of monies provided through the type of documentation specified by the Department and will maintain an accounting system for its entire operation that is in accordance with Generally Accepted Accounting Practices (GAAP) and other requirements applicable to the expenditure of contract monies.
- b) The proposer assures the Department that it will conduct its business in accordance with all federal and state legal authorities that are applicable to its operation.
- c) The proposer assures the Department that it has not acted in collusion with other proposers or contractors for the purpose of gaining unfair advantages for it or other proposers or for the purpose of providing the services at a noncompetitive price or in a noncompetitive manner.

2) Labor Law Assurances

The proposer assures the Department that it is an independent contractor and that it will maintain necessary and appropriate workers' compensation and unemployment insurance coverage. The proposer assures the Department that it is to be solely responsible for and must meet all legal requirements pertaining to its activities and employees, including payment of all applicable taxes, premiums, deductions, withholdings, overtime and other amounts which may be legally required with respect to the Proposer, as a legal entity, and the employment and use of all persons providing services for the contractor's performance under contract.

3) Assurances for Federal Law Purposes

Federal regulations require that a potential proposer sign and submit with its proposal a form containing a list of assurances that in part or in whole are applicable to a contractor receiving federal funding through this contract.

The Contractor, in addition to the federal requirements specified in this Contract and any attachments to this Contract, must comply with the applicable federal requirements and assurances for recipients of federal grants provided in the federal OMB 424B (Rev. 7-97) form, known as "ASSURANCES - NON-CONSTRUCTION PROGRAMS", and in the Department's "CERTIFICATION OF COMPLIANCE WITH CERTAIN REQUIREMENTS FOR DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES (6-99)". Those assurance documents must be signed by the Contractor and submitted to the Department prior to the signing of this Contract.

A potential proposer must complete the certification which is found in Attachment D and submit it with its proposal.

An organization that is debarred or suspended from receiving federal funds may not submit a proposal for a contract that involves federal funding.

I. Attachments

This section should provide a comprehensive list naming and identifying the attachments to the proposal.

J. Proposal Index

In order to ensure a fair and complete evaluation of the proposal, the proposer **must** submit a detailed proposal index which identifies the location in the proposal, by page and paragraph, of each of the minimum proposal requirements found in Section IV of this RFP.

VII. SELECTION PROCESS

A. General Process

The selection of the proposer or proposers to be offered a contract with the Department for the purposes of this RFP is a discretionary act of the Department.

The selection of the proposer or proposers to be offered a contract is the responsibility of the administrator of the division that administers the program of services the contract is in furtherance of.

The procurement official for the Department reviews the proposals initially to determine whether they have been submitted by the required time and date, whether they are in form and content in compliance with this RFP, and whether there are any matters such as claim of confidential material that must be immediately addressed.

The proposals that appear to be responsive are submitted to a proposal evaluation committee to be evaluated in relation to the scored and other criteria. The proposal evaluation committee, in addition to evaluating the scored criteria, may recommend that a proposal be rejected as nonresponsive for either form and content or failure to meet substantive requirements of this RFP.

The proposal evaluation committee, based upon the scores and other information obtained and evaluated by the committee, recommends to the administrator of the division the proposal or proposals to be selected.

The administrator of the division determines which departmental staff are to obtain and evaluate information from references and other sources.

The administrator, based on cost information and on information from references or other sources concerning matters of past performance or fiscal and programmatic integrity, may select a proposer other than the proposer recommended by the evaluation committee.

Section II of this RFP sets forth procedures, criteria, and reserved rights pertinent to the selection process.

VIII. EVALUATION PROCESS

Section II of this RFP sets forth procedures, criteria, and reserved rights pertinent to the selection process.

A. Evaluation Criteria

A proposal that fails to receive the minimum points during evaluation for any one category will receive no further consideration and is considered unacceptable.

B. Selection Criteria

The proposals are to be evaluated based on the following criteria:

- 1) the scores of the various proposals received in the scored process of the evaluation,
- 2) the information concerning past performance and integrity received from references and other sources, and
- 3) the total costs of the proposals.

These criteria are independently evaluated by the Department.

The administrator selects the successful proposer or proposers based on the following results in the evaluation of the criteria:

- 1) the receipt of a high ranked scored evaluation;
- 2) the receipt of overall positive responses and information from references and other sources concerning past performance in respect to the areas and features of intended performance and in respect to integrity; and

- 3) the total cost being at an acceptable amount.

A proposal receiving a high score may not be selected if the Department determines that the cost is unacceptably high.

Consideration is given throughout the evaluation process to the current and long term needs of the developmental disabilities service system including the proposal's content that indicates commitment to the State's direction in service provision, community integration, community involvement and the efficient management and use of taxpayer resources.

C. Information On Past Performances And Other Matters

The Department obtains and relies upon information from references and other sources as to a proposer's past performances in respect to the areas and features of intended performance and in respect to fiscal and programmatic integrity. This information may include the proposer's history of working successfully and cooperatively with the Department and other entities.

D. Proposal Evaluation Committee

A Proposal Evaluation Committee is established by the Department to evaluate all proposals determined to be responsive and to make a recommendation based on the scored evaluation portion of the selection process as to the proposer or proposers to which contracts should be offered.

The Department selects the members of the committee.

The scored evaluation of this RFP is based on the following criteria:

- 1) Proposer's Experience and Capabilities: Possible points **40 points**. Minimum points necessary **25 points**.

This section is an evaluation of information related to the proposer's organization, personnel, and experience that would substantiate its qualifications and capabilities to perform the services described. The evaluation includes:

- * administrative capabilities of the organization in relation to the delivery of services;
- * resources and supports of the organization that can be applied to the delivery of services;
- * experience of organization in delivery of the sought after services or services similar to the sought after services; and
- * qualifications of staff to be assigned to the work.

- 2) Methods and Services: Possible points **40 points**. Minimum points necessary **25**

points.

This section is an evaluation of information presented by the proposer to substantiate the proposer's understanding of the duties and responsibilities and to determine the feasibility and quality of the proposer's proposed performance.

The evaluation includes:

- * appropriateness, quality, and effectiveness of the services as proposed for the delivery; and
 - * resources and supports the organization can obtain from community and other sources that contribute to the development, maintenance and delivery of services.
- 3) Budget: Possible points **20 points.** Minimum points necessary **16 points.**

This section includes an evaluation of the proposed budget to determine whether the proposer has an appropriate budget proposal for purposes of adequate and competent performance of the contractual duties and responsibilities. This section includes evaluation of:

- * whether the budget categories are appropriate and acceptable for performance; and
- * whether the sums designated in the budget are appropriate for the various particulars of performance.

E. Decision

The selection of the successful proposer or proposers is made by the administrator of the division that is seeking services or other person specifically designated by the administrator as the decision maker for this proposal process.

The selection is made after review of the recommendations of the proposal evaluation committee, the information concerning past performance and fiscal and programmatic integrity, and the total costs, along with supporting materials and other information obtained for purposes of the selection process.

F. Notice Letters

Upon a final decision as to the proposer or proposers to be offered a contract for services, the Department provides written notice of that decision to all proposers.

IX. ENTERING INTO A CONTRACT

A. Awarding of Contract

Upon review of and concurrence with the Proposal Evaluation Committee's evaluation and recommendation, the Department selects the most appropriate proposal or proposals and directs the contracting officer to enter into a contract or contracts.

The Department may then enter into best and final offer negotiation if that is in the best interest of the State with the most successful proposer. The Department may enter into best and final offer negotiation with another acceptable proposer if negotiation with the most successful proposer does not prove to be in the State's best interest.

B. Process

Prior to official execution of a contract, no contract or award may be assumed or announced.

A proposer may not commence work or commit funds, incur costs, or in any way act to obligate itself or the Department, as if it were the contractor prior to the award of the contract by the Department and the signing of the contract. All such efforts, costs, and other expenses incurred by a proposer prior to the announcement of the contract award by the Department and the signing of the contract are entirely the proposer's expense and may not be counted as performance or invoiced under any subsequently executed contract.

C. Submission of Necessary Certificates and Forms

1) Mandatory Submission

Contracts will not be issued to a successful proposer that fails to provide the required documentation within the allotted time frame. The contract of a contractor that submits inaccurate information on a form, that in any way misrepresents circumstances relating to the requirements noted below, that fails to appropriately revise a form or certification based on changing circumstances, or that fails to maintain a coverage requirement, is subject to termination by the Department.

2) Federal Forms

Any forms required for the receipt of any federal monies committed to the services to be delivered under the contract, must be completed and submitted by the intended contractor prior to the signing of the contract. The contractor must submit a revised form immediately upon any change in circumstances that effect a substantive change in the information or assurances provided through the then current form.

3) Workers' Compensation Coverage

A certificate of coverage for workers' compensation insurance or, if appropriate, an independent contractor's exemption, must be presented to the Department by the intended contractor prior to the signing of the contract. The insurance coverage or exemption must be maintained at all times during the term of the contract.

4) Insurance Coverage

A certificate of insurance coverage, indicating compliance with the required insurance coverage, must be presented to the Department by the intended contractor prior to the signing of the contract. The insurance coverage must be maintained at all times during the term of the contract.

X. S - For Request for Proposals Only

Attachments A - E follow accordingly.

ATTACHMENT A

CONTRACT

NOT INCLUDED IN THIS VERSION

For Request for Proposals Only

ATTACHMENT B

For Request for Proposals Only

CONTRACT APPENDICES

These include appendices exist for the following specific services included in this RFP:

Appendix A - Information Services: Family Support Services Information Network (FSSIN)
and Training and Resource Information Center (TRIC)

Appendix B - Evaluation and Diagnosis

Appendix C - PASARR/MR Specialized Services

APPENDIX A

INFORMATION SERVICES:

FAMILY SUPPORT SERVICES INFORMATION NETWORK (FSSIN)
AND
TRAINING AND RESOURCE INFORMATION CENTER (TRIC)

1.0 Purpose – TRIC and FSSIN

- 1.1 The Training Resource and Information Center (TRIC) is a specialized public access lending library and service for resource assistance. The library's collection focuses on the various aspects of disabilities with an emphasis on developmental disabilities.
- 1.2 The Family Support Services Information network (FSSIN) is the automated information and referral system serving as Montana's central directory of early intervention and family support services.

The Training Resource and Information Center (TRIC) Contract Information:

2.0 Public Access to the TRIC:

- 2.1 The TRIC will remain open for walk in patrons from 8:00 AM through 5:00 PM, Monday through Friday.
- 2.2 A toll free telephone line will be available for TRIC patrons 24 hours per day, seven days per week.
- 2.3 TRIC will offer an on line electronic mail service to answer inquiries or materials requests from patrons.
- 2.4 Access to TRIC materials will be available through interlibrary loan service, accessible through the patron's local library or by electronic mail request.
- 2.5 TRIC will maintain a website to facilitate public access and awareness of services and materials available.

3.0 TRIC Operations - Response Times to Patron Requests and Inquiries

- 3.1 Patron inquiries for assistance will be responded to by TRIC staff within two working days.
- 3.2 Patron requests for materials will be shipped within one working day.
- 3.3 Patron requests for materials requiring copying will be shipped within two working days.
- 3.4 Patron requests for materials already checked out will be processed according to the waiting list policy. Within one day of the request for such materials, patrons will be notified as to the approximate time for shipment of materials.

4.0 TRIC Service Charges

- 4.1 TRIC will pay one way postage for material sent to patrons, and include a return mailing label. All materials mailed by TRIC will be sent library postal rate. Items will be insured by TRIC according to TRIC policy. Items exceeding \$250 in value will be insured. The patron will normally pay for return postage, and will be encouraged by TRIC to insure items which exceed \$250.00 in value.
 - 4.1.1 Exceptions to the requirements for patrons to pay return postage and insure materials exceeding \$250.00 in value may be granted, based on TRIC policy.
- 4.2 TRIC will offer interlibrary loan service to patrons. Patrons may request materials available through interlibrary loan. These materials are picked up and returned by the patron at their local library. There are no postal fees for this service.
- 4.3 TRIC will have a policy regarding the number of pages of copied materials to be sent per request. Requests for copied materials exceeding the policy limits may result in the original documents being sent to the patron, subject to the provisions of the circulation and waiting list policies. Requests for copies from materials which cannot leave TRIC will be filled.
- 4.4 There will be no fines levied for overdue materials.
- 4.5 Patrons who do not return overdue materials will be billed for replacement as specified in Section 5.5.

5.0 TRIC Check Out Policies

- 5.1 Materials are normally checked out for up to three weeks. TRIC will reserve the right to allow patrons to check out materials for up to one month if the requested materials are not on the waiting list.
- 5.2 Materials may be renewed in person, by telephone, mail, fax or electronic mail if no one is waiting for the item.
- 5.3 A reasonable number of books and journals may be checked out at once. The number of videos, curricula, audio cassettes and software packages which may be checked out at one time will be in accordance with TRIC policy.

- 5.4 Patrons may have their names placed on a waiting list for materials currently checked out. When the materials return, they will be offered to patrons on the waiting list on a first come, first served basis.
- 5.5 Patrons with overdue materials will be notified in writing at a minimum rate of every two weeks, up to a maximum of two months. TRIC will then bill the patron for replacement.
 - 5.5.1 TRIC staff will also make courtesy reminder telephone calls to these patrons. Immediate contact with the patron will be made if the overdue material is on the reserve waiting list.
- 5.6 If there is no waiting list for a requested material, patrons may request that material for a specific date.

6.0 TRIC Cataloging System

- 6.1 Topical designations will be entered into a database, which will be compatible with selected library management software. The catalog can be searched by author, title, subject, keyword, circulation number, location and type, by walk in patrons or TRIC staff upon patron request.
- 6.2 Materials entered in the TRIC database will include a precise description of the designated target audience.
- 6.3 Patron access to an on-line catalog will be made available to remote locations equipped with compatible software.

7.0 TRIC Literature Searches

- 7.1 All TRIC staff working between the hours of 8:00 AM and 5:00 PM, Monday through Friday will be capable of conducting literature searches. These include TRIC holdings and information available on electronic databases. Patrons may request searches by electronic mail, paper mail, fax, telephone or walk-in request. Assistance will be provided to walk-ins to conduct literature searches.
- 7.2 Specialized searches involving the Western Library Network members and other sources of materials will be conducted by the librarian. This person will be available from 9:00 AM through 3:00 PM, Monday through Friday.

8.0 TRIC Circulation System

TRIC will maintain a computerized circulation system which will:

- 8.1 Inventory all holdings, maintain a record of checked out materials, due dates and generate overdue notices.
- 8.2 The automated circulation system will be capable of generating statistics regarding circulation of materials including:
 - 8.2.1 frequency of use of materials by title and topic;
 - 8.2.2 characteristics of patrons, including geographic location and classification (i.e., parent, service provider, educator, etc.); and
 - 8.2.3 materials added, replaced and deleted.
- 8.3 The circulation system will be capable of accommodating the expansion of TRIC holdings.

9.0 TRIC Purchasing Procedures

- 9.1 The librarian will purchase new and replacement materials and subscriptions from an ongoing prioritized list. This list will be developed by the librarian using input from the following sources:
 - 9.1.1 review of the materials catalogs;
 - 9.1.2 research of material reviews from all sources;
 - 9.1.3 summary of circulation statistics by topic;
 - 9.1.4 summary of the request logs and contact sheets maintained by the TRIC staff for materials not available;
 - 9.1.5 summary of the needs identified in the annual consumer survey and potential patron questionnaires;
 - 9.1.6 prioritized list of materials for which patrons were placed on a waiting list, based on the average delay entailed in accessing these materials; and
 - 9.1.7 review of the formal recommendations from the Statewide Training Committee.
- 9.2 The prioritized list will be presented to and approved by the TRIC advisory committee prior to the purchase of new or replacement materials.

10.0 TRIC Newsletter

- 10.1 TRIC will publish a quarterly newsletter designed to improve the quality of services to persons with developmental disabilities. This publication will meet the following requirements:
- 10.2 The publication will be written with direct services provider staff and parents of children with developmental disabilities as the target audience.
- 10.3 Subject material will be designed to impart and promote best practices, safety information, and training opportunities. Information designed to improve the quality of life for persons with developmental disabilities will be given highest priority for publication.
- 10.4 The Developmental Disabilities Program (DDP) may target specific topics to be addressed in advance of publication.
- 10.5 Publication topics will be discussed with the library advisory board.
- 10.6 Copies of the publication will be mailed/e-mailed to all DDP funded provider addresses listed in the DIRECTORY OF SERVICES FOR PEOPLE WITH DEVELOPMENTAL DISABILITIES, and the DDP central, regional and satellite offices. A copy of this directory will be obtained annually.
- 10.7 Input from the publication target audience will be solicited and encouraged by the Contractor for the purpose of:
 - 10.7.1 addressing issues and concerns of direct service staff affecting the quality of services; and
 - 10.7.2 submitting articles for publication in the newsletter.

11.0 TRIC Advisory Committee

- 11.1 A standing advisory committee will be maintained to provide assistance, direction and guidance in the operation of TRIC functions as outlined in this contract.
- 11.2 The TRIC advisory committee will be made up of no more than 15 members with an emphasis on broad geographic representation. New members are selected by majority election from the existing membership following nomination by a committee member at a regular meeting. Members will serve a three year term and may be elected twice making the total number of years served as six. Once a member completes the second term, he or she must be off the committee for one full year before being nominated again. The TRIC advisory committee will be composed of one or more representatives from each of the following categories:

- 11.2.1 a non-profit corporation representative providing direct services to children and contracting with the DDP;
 - 11.2.2 non profit corporation representative providing direct services to adults and contracting with the DDP;
 - 11.2.3 a representative designated by the Montana Association for Community Disabilities Services (MACDS);
 - 11.2.4 a board member of the Contractor;
 - 11.2.5 a parent of a person with developmental disabilities;
 - 11.2.6 a person with a developmental disability;
 - 11.2.7 a representative of the Department; and
 - 11.2.8 a librarian currently employed in a library.
 - 11.2.9 members at large.
- 11.3 Activities of the committee include, but are not limited to:
- 11.3.1 annual review of TRIC policies and procedures for the purpose of making recommendations for improvement;
 - 11.3.2 involvement in decisions regarding the acquisition and purging of TRIC materials; involvement in decisions regarding the acquisition and purging
 - 11.3.3 review of surveys, questionnaires, and other feedback related to the evaluation of the materials, methods of operation, and services provided by TRIC, for the purpose of making recommendations for improvement in these areas; and
 - 11.3.4 recommendations targeting topics and subject areas to be addressed in future issues of the newsletter.
 - 11.3.5 The Committee or Committee members shall assist the Contractor with suggestions on how to secure additional funds to assist with enlarging the library's collection of material.
- 11.4 The advisory committee will meet at least quarterly. Members will meet in person at least once per year.
- 11.5 A TRIC employee will be available to the advisory committee upon request.

12.0 Fostering Public Awareness of TRIC

- 12.1 The contractor will promote the availability of TRIC services and resources as outlined by the following activities:
- 12.2 A website with information regarding services, activities, and materials will be maintained and updated regularly.
- 12.3 Listing of the Contractor in the Montana Directory of Services for Persons with Developmental Disabilities;
- 12.4 Quarterly informational mailing/e-mailing included in "Quality Matters" to all addresses listed in the DIRECTORY OF SERVICES TO PERSONS WITH DEVELOPMENTAL DISABILITIES. This document will feature new listings acquired by TRIC.
- 12.5 An annual Public Awareness Plan will be submitted to the Advisory Committee as a suggestion to increase public awareness.
- 12.6 TRIC will participate in appropriate and relative conferences as a means to increase public awareness.

13.0 TRIC Evaluation Activities

- 13.1 TRIC will complete activities designed to enhance the quality of the service. These activities will include summarizing the following sources of information as part of the TRIC evaluation process:
- 13.2 An annual questionnaire will be sent to 100 individuals involved in the DDP service system, including executive directors and program managers of nonprofit corporations serving persons with disabilities, DDP contracted and targeted case management staff, DDP field and state office staff. The questionnaire will address the following:
 - 13.2.1 current level of satisfaction with TRIC services;
 - 13.2.2 information on whether the respondent uses TRIC services;
 - 13.2.3 present level of awareness of TRIC services;
 - 13.2.4 suggestions for improving services; and
 - 13.2.5 suggestions for increasing public awareness of the service.

- 13.3 Evaluation slips periodically placed with materials sent from TRIC requesting patron feedback. Examples of requested information should be as follows:
 - 13.3.1 Were TRIC staff prompt and courteous in responding to patron inquiries and requests for materials?;
 - 13.3.2 How could TRIC materials or services be improved to better meet the needs of patrons?; and
 - 13.3.3 What do patrons feel are the current strengths of TRIC's services?
- 13.4 Use of electronic and manual databases to identify the need for materials, including:
 - 13.4.1 library management software which records frequency counts of usage for every item;
 - 13.4.2 a summary of telephone and contact logs indicating materials requested, but not available; and
 - 13.4.3 average duration of the waiting list for patrons requesting materials in circulation.
- 13.5 Librarian suggestions for materials or any changes designed to enhance TRIC based on input from other library professionals.
- 13.6 The annual survey of 400 randomly selected patrons of services. This survey will contain a section for patrons to provide input in the following TRIC areas:
 - 13.6.1 current level of satisfaction with TRIC services;
 - 13.6.2 new services/materials desired;
 - 13.6.3 changes in service patrons would like to occur; and
 - 13.6.4 new materials needed.
- 13.7 A summary of Section 13.5 will be made available annually to the library advisory committee and the DDP contract liaison.

14.0 Expansion of TRIC Holdings

- 14.1 TRIC will increase the materials available to patrons on an annual basis. Expansion will consist of the following:

- 14.2 TRIC will purchase a minimum of \$600 worth of new materials annually with funds from the DDP contract.
- 14.3 The Contractor will add at least \$1000 worth of new materials annually to the library through other funding sources. In the event other funding sources are not located or available, the Board of Directors will provide a written request for exemption from this requirement.
- 14.4 On an annual basis, the contractor will submit a year-end grant request to the DDP for purchasing additional TRIC materials.
- 14.5 The material purchased by the Contractor through other funding sources, will be the property of the Contractor rather than TRIC and should be coded as thus.

15.0 TRIC Availability of Bibliographies

- 15.1 TRIC will produce and disseminate bibliographies per request as appropriate:
- 15.2 Bibliographies by author, topic, keyword, etc., will be copied and forwarded to patrons upon request, within the limits of the copying policy. Lengthy bibliographies will be sent on computer disk, if this meets the needs of the patron.
- 15.3 A computer disk of the bibliography for all TRIC holdings will be produced and updated at least annually. A copy of the disk will be sent upon patron request.
- 15.4 At least annually, a computer disk/file in the agreed-upon format and language of all TRIC holdings will be sent to the DDP contract liaison.

16.0 TRIC State-Owned Equipment

- 16.1 All State-owned materials and equipment housed with the Contractor is subject to the current State rules and laws governing the use and disposition of state property. Property will not be disposed of without written authorization from the Department.
- 16.2 All audio visual equipment owned by the State of Montana and housed at TRIC will be made available to the DDP for use in any of the Montana Conferences on Developmental Disabilities.

Family Support Services Information Network (FSSIN) Contract Information:

17.0 ONGOING OPERATION OF THE FSSIN

- 17.1 Operate the Family Support Services Information Network (FSSIN) by answering calls and providing accurate information and referral to appropriate services as requested by consumers through the use of the database of service and resource information and the statewide toll free telephone line.
- 17.2 The toll free number must be in service from 8:00-5:00, Monday through Friday throughout the year. Provisions for coverage of after hours calls is also required (e.g., calls received after hours should be recorded by an answering machine and returned the next business day).
- 17.3 Calls must be answered by staff who are trained and knowledgeable about the operation of the database system as well as program issues including normal child development, developmental delay, the Developmental Disabilities service system, a family centered approach to providing services, and information and referral services.

18.0 INSURE ACCURACY OF THE FSSIN DATABASE

- 18.1 Insure the database/website of service and resource information is complete and up-to-date. The database application/website must be useable and readily accessible to the staff who answer calls and must have the capacity to provide the information and referral services requested by consumers.
- 18.2 Continue to maintain and update the database/website manual including:
 - 18.2.1 written procedures to update, clean-up, and maintain resource information on an ongoing as well as an annual basis;
 - 18.2.2 detailed and specific written procedures and instructions for implementing, operating and maintaining the FSSIN. Procedures should include but not be limited to: website update, data input, editing of data, match searches, report generation (both scheduled and on request), data verification, purging files, maintaining history of files, recovery, back-up, restore, documentation and common problem resolution.
 - 18.2.3 provide copies (disk and hard) of the written procedures and instructions to the Department upon request.

19.0 ONGOING AWARENESS OF FSSIN

- 19.1 Continue to make the FSSIN known to families, providers, and professionals in Montana through an ongoing public relations campaign,

through the ongoing revision and dissemination of printed information publicizing the existence of the network, and through development and expansion of family outreach activities.

- 19.2 To insure the widespread use of the system, the Contractor must implement and maintain a publicity strategy to publicize the existence and promote the ongoing use of the system. At a minimum, the Contractor must:
 - 19.2.1 Continue to refine and improve the plan for publicizing the Family Support Services Information Network;
 - 19.2.2 Continue to disseminate information to primary referral sources statewide, with an emphasis on General Practitioners, Family Practice Physicians, Neonatal Intensive Care Units, Indian Health Services and other health care providers.
 - 19.2.3 Continue to distribute the most current edition of the FIRST STEPS: Parent Information Handbook statewide with an emphasis on General Practitioners, Family Practice Physicians, Neonatal Intensive Care Units, Public Health Departments, Indian Health Services and other tribal health agencies, Head Start programs, and rural/remote areas of the state.

20.0 FSSIN PUBLIC AWARENESS EFFORT

Continue to implement a public awareness effort utilizing a variety of media for publicity (e.g., public service announcements, newspapers, newsletters, radio, etc.), including continuing to provide the FSSIN toll free number as the contact number to be used in twelve public service announcements produced by the Montana Council on Developmental Disabilities, Montana Child Find, Healthy Mothers/Healthy Babies, the Family Support Services Advisory Council and/or the Disability Services Division whenever they are aired.

21.0 FSSIN FAMILY OUTREACH EFFORT

- 21.1 Continue the parent-to-parent family outreach effort which focuses on "first contacts" with families who have infants newly diagnosed with a disability.
- 21.2 Continue to implement an evaluation system to assess the effectiveness of the piloted family outreach efforts. Encompass data from these efforts (number of referrals made, age of child at referral, disability, demographics, etc.) in the Contractor's quarterly reports to the Department.
- 21.3 Monitor and demonstrate the use and effectiveness of the FSSIN through

implementation of a structured evaluation protocol.

21.3.1 To insure the ongoing usefulness and responsiveness of the information and referral system, a structured evaluation component must be part of the system.

21.3.2 At a minimum the Contractor must:

21.3.2.1 Continue to implement a procedure for intra-office evaluation (assuring reliability of information provided by all referral personnel using the automated system);

21.3.2.2 Maintain automated records for numbers and types of calls, where calls originate, ability to address needs specific to calls, and availability of services in communities;

21.3.2.3 Maintain the process for generating and distributing quarterly reports and an annual summary of all project activities to the Department. Quarterly reports should be detailed and contain information on the types of calls, where calls originate, ability to address needs specific to calls, and availability of services in the various communities

21.3.2.4 Maintain an automated procedure for summarizing demographics and concerns of callers and studying the use of the information network; and

21.3.2.5 Each June, update the FSSIN through a survey of those agencies and information sources for which there is no recently verified data. Two types of surveys should be completed: one asking for new information from agencies and information sources not yet in the database, and another with a printout of information already in the database, asking for confirmation of the information or needed corrections; and

21.3.2.6 Maintain the ongoing process for evaluating effectiveness of and consumer satisfaction with FSSIN services through the use of annual consumer surveys distributed through the newsletter. Include the evaluation data collected through this evaluation method in the Contractor's quarterly reports to the Department.

22.0 INFORMATION SERVICES (TRIC and FSSIN) Contract Performance

Performance of TRIC and FSSIN services to be provided listed above will be evaluated throughout the term of this contract.

APPENDIX B

EVALUATION AND DIAGNOSIS SERVICES

1.0 PURPOSE

The purpose of Evaluation and Diagnosis Services is to in part, identify the presence/absence of disabling conditions, determine individual deficits, and formulate specific recommendations to address those deficits or select treatment/intervention alternatives. Further, when appropriate, the transdisciplinary evaluation staff should see persons for the purpose of making statements regarding the rate of progress as well as prognosis. Frequently the purpose of evaluation services varies widely as a function of the questions and concerns stated at the time of referral. Example: "Does this person hear?", "Is this person generally delayed?", "Are the existing program goals and objectives established for the person appropriate?" etc. Evaluation Service then is a multipurpose activity that has the potential for making substantial change in the daily routine of each and every consumer served.

2.0 SERVICE DESCRIPTION

- 2.1 A transdisciplinary team evaluation is defined as an evaluation completed by a team of experts from a variety of disciplines. The composition of a team may vary in the disciplines represented according to the unique needs of the consumer and family. The participation of the consumer's family in the team may vary according to the family's preference.
- 2.2 An evaluation is defined as a process to: 1) determine the diagnosis of a delay or disability; 2) determine strengths and deficits; 3) determine a consumer's initial or continuing eligibility for services; and 4) develop referral and/or consumer and family program recommendations.
- 2.3 Method of evaluation incorporates the following elements:
 - 2.3.1 Evaluation/Assessments will be conducted by personnel qualified to utilize appropriate instruments, methods and procedures.
 - 2.3.2 Evaluation/Assessments will be conducted utilizing reliable and valid screening and evaluation instruments/tests utilizing the guidelines of the instrument/test developer; and informed clinical judgment rating scales/checklists.
 - 2.3.3 Evaluation/Assessment must be based on informed clinical

judgment and include a review of the person's current health status and medical history.

- 2.3.4 Evaluation/Assessment includes the developmental areas of cognitive, physical, language/speech, psychosocial, and self-help skill development.
- 2.3.5 Evaluation/Assessment will be conducted utilizing a family-centered approach to diagnose and assess the person's strengths and deficits and will take into consideration the wants, priorities, and resources of the family in developing individual and family program recommendations. The following principles are included as part of a family centered approach to evaluation: a) families choose whether or not to have an evaluation performed; b) families choose the type of evaluation, disciplines involved, and when appropriate, the location for conducting the evaluation; and c) families choose between diagnostic evaluation, a formalized assessment to provide program planning ideas and/or a technical consultation for a specific need such as behavior intervention, feeding, etc.
- 2.3.6 Evaluation/Assessment procedures should determine the person's unique needs, the family's strengths and needs related to the development of the person, and the nature and extent of services that are required by the consumer and family to meet the identified needs.
- 2.3.7 Evaluation/Assessment results will be discussed with the family to determine if the findings are consistent with previous information collected, the family's understanding of previous data and diagnosis and the family's interpretation of any recent evaluation results. Families will be able to discuss any concerns they have with the evaluation results at the Post-Evaluation Conference.
- 2.3.8 Evaluation/Assessment information (verbal and written reports) must be free of jargon and terms that are subject to misinterpretation by persons involved in the evaluation process. The evaluation reports should be readable for both families and professionals alike.
- 2.3.9 Evaluation/Assessment should be completed in a timely

manner with information (evaluation reports) disseminated to the family within a reasonable period of time.

2.3.10 Evaluation/Assessment will provide Support Coordination services from point of referral through follow-along depending upon needs of the consumer and family.

3.0 PROGRAM COMPONENTS

The following components are provided to any person who is referred for evaluation and/or diagnostic services.

3.1 Referral and Intake

Referral and intake is a process of gathering information regarding a person and family and stating concerns, questions and expectations of the evaluation outcomes. This process may include accessing pertinent information, and screening committee review to determine if the evaluation should be scheduled or further referral should be made, defining diagnostic and/or programmatic questions in order to determine the appropriateness and type of evaluation, and conducting an intake interview and/or writing a social assessment.

3.2 Support Coordination

A Support Coordinator is assigned to each person. The Support Coordinator has the responsibility for facilitating the evaluation process, developing needed resource referrals, and following up on evaluation recommendations. The Support Coordinator will also provide any follow-along services necessary to meet evaluation recommendations and other needs identified by the person and or family. Follow-along services are terminated when the person's and or family's needs have been met or the individual transitions into appropriate services.

3.3 Evaluation

Conducting the transdisciplinary team evaluation as defined in Section 2.0 above.

3.4 Post Evaluation Conference

A post-evaluation conference is held with the person and/or family to provide an opportunity for full interpretation of evaluation results and the development of recommendations in written summary form.

Results will be discussed with the family to determine if the findings are consistent with previous information collected, the family's understanding of previous data and diagnosis and the family's interpretation of any recent evaluation results.

Evaluation reports shall be completed and disseminated to the family in a timely manner. All reports (verbal and written) must be free of jargon and terms that are subject to misinterpretation by individuals involved in the evaluation process. The evaluation reports should be readable for both families and professionals alike.

Families will be able to discuss any concerns they have with the evaluation results at the Post-Evaluation Conference.

4.0 PERFORMANCE REQUIREMENTS

The performance requirements section of this contract appendix specifies the measurable products of behavioral performance by which provision of service will be evaluated. It is expected that the following requirements will be accomplished by means which conform to Department rules and policies and in accordance with other applicable provisions of this contract.

4.1 Provision of Services

Services will be provided within the following minimum requirements;

4.1.1 The contractor shall maintain diagnostic records which will document each evaluation with or on behalf of an eligible person and describe the services provided.

4.1.2 The contractor shall perform an annual consumer satisfaction survey of consumers/families that receive services during the year. Results will be provided to the division upon request.

4.1.3 The contractor shall provide each person/family with a copy of the agency's procedure to appeal decisions made by the contractor.

4.1.4 The contractor shall bill all other appropriate funding sources

prior to billing evaluation and diagnostic services to the division.

4.1.5 The contractor shall limit evaluation and diagnostic services performed using division contract funds to children birth to six (6) years of age and adults 19 years of age and older.

5.0 UNIT OF SERVICE

A Unit of Service for Evaluation and Diagnosis Services shall be defined as the completion of the Post-Evaluation Conference with the family and/or person receiving E&D services.

APPENDIX C

PASARR/MR EVALUATION AND SPECIALIZED SERVICES

PASARR/MR EVALUATION AND SPECIALIZED SERVICES

1.0 Purpose

The purpose of PASARR/MR (Pre-Admission Screening Annual Resident Review for Mental Retardation) Evaluation and Specialized Services is to provide services to nursing facility residents or applicants, as required by federal law (OBRA, 1992 as amended). PASARR/MR Level II evaluations are provided to nursing facility applicants to: (1) determine if the person has mental retardation or related conditions; (2) assess the need for specialized services; and (3) recommend the most appropriate placement. An Annual Resident Review (ARR) will be provided for each nursing facility resident found to have mental retardation or related conditions. The purpose of the ARR is to reassess the need for specialized services, and develop a plan if needed.

2.0 Definitions

- 2.1 "Mental retardation" refers to a significant subaverage general intellectual functioning existing concurrently with deficits in adaptive behavior and manifested during the developmental period.
- 2.2 "Related conditions" means that a person has a severe, chronic disability attributable to cerebral palsy, epilepsy, autism or any other condition, other than mental illness, found to be closely related to MR that results in impairment of general intellectual functioning or adaptive behavior similar to that of persons with MR and requires treatment or services similar to those required to these persons. The condition must manifest before the person reaches age 22, be likely to continue indefinitely and result in substantial functional limitations in three or more of the following areas of major life activities: self-care, understanding and use of language, learning, mobility, self-direction and capacity for independent living.
- 2.3 "Specialized Services" means the service provision of a specialized service coordinator, approved by the Developmental Disabilities Program, to develop and implement a specialized service plan for nursing facility residents with mental retardation and related conditions. The specialized services coordinator also monitors the implementation of the plan and maintains contact with the person residing in the nursing facility during the period between ARR's.

- 2.4 "Specialized Services Plan" means an individual treatment plan for a person, developed by a coordinator approved by the Developmental Disabilities Program, that may include specialized training, specific therapies or treatments which may be provided or arranged for by a nursing facility, activities, generic services, health services, and support services not provided by nursing facilities.
- 2.5 "Specialized Services Supports" means the provision of limited funds for services and/or supplies, which cannot be provided by nursing facilities.
- 2.6 "Nursing Facility Level of Care" means the person needs the services of an institution which is primarily engaged in providing to residents: (1) skilled nursing services, (2) rehabilitation services, or (3) on a regular basis, health-related care and services because their mental or physical condition requires care and services above the level of room and board, which can be made available to them only through institutional facilities.
- 2.7 "Appropriate placement" means that persons with mental retardation and related conditions are generally considered to be most appropriately placed in the least restrictive community-based placement possible, with specialized services and supports provided to meet their needs and maximize their abilities to participate in their community. Placement in a nursing facility is considered appropriate only when the person's needs are such that person meets the minimum nursing facility level of care and the person's needs for treatment do not exceed the level of services which the facility is capable of providing. Persons with mental retardation or related conditions will generally only be considered appropriate for nursing facility placement if they are elderly or have serious medical conditions, which cannot be met in the community, and require placement in a 24 hour nursing care facility and their secondary specialized service needs can be met while they are residing in the nursing facility.
- 2.8 "QMRP Psychologist" means a Qualified Mental Retardation Professional Psychologist, who must have at least a master's degree in psychology and at least one year of experience working with persons with mental retardation.

- 2.9 "PASARR Level I Screen" means an identification screen, which must be completed for every applicant to a nursing facility, regardless of payment source, to determine if the person meets nursing facility level of care and if so, if the person may have mental retardation or related conditions, in which case the person must be referred for a PASARR/MR Level II Screen.
- 2.10 "PASARR/MR Level II Screen" means an evaluation of applicants to nursing facilities to determine if they have mental retardation or related conditions, to determine if they need specialized services, and to determine if a nursing facility is the appropriate placement for the person.
- 2.11 "Subsequent PASARR/MR Screen" means a PASARR/MR Level II screen which is completed for a person who has earlier been screened, but whose condition may have changed since the first screen. A documentation of mental retardation or related conditions is not repeated, and a specialized service plan may be developed for the person if needed.
- 2.12 "Specialized Service Assessment" means a PASARR/MR Level II is completed for a person approved by the DDP to reside in a nursing facility, whose need for specialized service have not been fully assessed. Upon completion of the assessment the PASARR Coordinator will develop and implement a specialized service plan.
- 2.13 "Annual Resident Review" means an annual evaluation that must be completed for each resident of a nursing home who was found to have mental retardation or related conditions through a PASARR/MR Level II screen. The purpose of the Annual Resident Review is to review and update the person's needs for specialized services, determine if continued nursing facility placement is appropriate, and develop a specialized service plan if needed.

3.0 PASARR/MR Evaluation - Contractor Responsibilities

- 3.1 The Contractor receives a Level II screen request from the DDP/ Quality Improvement Specialist, which minimally includes the PASARR/MR referral form information and a copy of the Level I screen.

- 3.2 The Contractor telephones the person, family member or facility to gather available information, such as: psychological testing, school records, medical reports, Individual Plans (IP's), Personal Support Plans (PSP'S), etc.
- 3.3 The Contractor conducts and documents a face-to-face interview with the person and his primary caretakers for the purpose of documenting history of services, the person's strengths and weaknesses in adaptive functioning, and present care and training requirements. The contractor will complete an Inventory for Agency and Client Planning (ICAP) assessment, which will be mailed or phoned to the DD Program for scoring. Results will be phoned or mailed back to the Contractor, with a written summary provided.
- 3.4 If necessary, the Contractor will arrange for psychological testing for the person. Payment for this testing will be billed as a regular Medicaid service for persons eligible for Medicaid. Costs for psychological testing for non-Medicaid eligible persons needing PASARR/MR evaluations will be covered by this contract. The Contractor will get prior authorization by phone from the referring Quality Improvement Specialist, or the OBRA/DD coordinator. The costs may not exceed the Medicaid rate for psychological testing.
- 3.5 The Contractor prepares the PASARR/MR QMRP Report. The report must determine if the person has mental retardation or a related condition. The report must be signed by a qualified QMRP Psychologist, who has been approved by the Department. If the person does not have mental retardation or a related condition, the Contractor need not prepare the Specialized Service Report.
- 3.6 The Contractor prepares the PASARR/MR Specialized Service Report which describes the person's training and treatment needs and appropriate placements for meeting these needs.
- 3.7 The Contractor mails the completed PASARR/MR evaluation to the OBRA/DD Consultant within an average of 7 to 9 working days of the evaluation referral. To meet this time line, the results may be phoned in, with the written report to follow within the next 9 working days.
- 3.8 The Contractor sends the originals of both reports to the referring

Quality Improvement Specialist for review and approval; also to be included are the Level I Screen, Interview form, and the PASARR/MR Results form.

- 3.9 The Contractor will conduct Annual Resident Reviews on each person with mental retardation residing in nursing homes. These reviews must be completed within the quarter prior to the date specified by the Department's ARR schedule.
- 3.10 The Contractor will assign a Specialized Services Coordinator for each nursing facility resident referred by the Department as needing specialized services. The Coordinator will develop a specialized services plan for the person, with the involvement of the person's family and the nursing facility staff. The Coordinator will assist in the development of the nursing facility's plan of care.
- 3.11 The Contractor will assist in the process of explaining specialized services and placement options to nursing facility residents.
- 3.12 The Contractor submits a monthly invoice, Form RS-AD-58, to the DD OBRA Coordinator for approval. The invoice will list all completed Initial PASARR/MR Evaluations, Subsequent Screens, Annual Resident Reviews, Specialized Services and support funds, and prior authorized psychological testing completed and submitted that month.
- 3.13 The Contractor completes and attaches the Department's PASARR Monthly Progress Report to the invoice.
- 3.14 The Contractor provides a current list of PASARR/MR consultants and QMRP Psychologist(s) for the Department's approval.

4.0 Department Responsibilities

- 4.1 Conduct Level I screens and determine Nursing Facility (NF) Level of Care on all applicants and current residents of nursing home facilities. (Senior & Long Term Care Division)
- 4.2 Refer all persons for a Level II - PASARR/MR screen when mental retardation or related conditions are indicated. (Developmental Disabilities Program)

- 4.3 Approve the qualifications of PASARR Consultants and QMRP Psychologists submitted by the Contractor. (Developmental Disabilities Program)
- 4.4 Provide training to the Contractor in providing PASARR/MR Evaluation and Specialized Services. (Developmental Disabilities Program)
- 4.5 Provide prior authorization and funding for needed psychological testing for non-Medicaid eligible persons needing PASARR/MR evaluations. (Developmental Disabilities Program)
- 4.6 Coordinate and assist in the process of explaining specialized services and placement options to persons with MR applying for placement in nursing home facilities. (Developmental Disabilities Program)
- 4.7 Provide formal notification to applicants of the results of the Level I and Level II screens and approval or denial for nursing home placement. (Developmental Disabilities Program)
- 4.8 Provide a Fair Hearing process for contested Level II-PASARR/MR screening results. (Developmental Disabilities Program)
- 4.9 Attempt to locate alternative placements and services for persons with MR or related conditions who are denied nursing home placements through the PASARR/MR screening process. (Developmental Disabilities Program)
- 4.10 Coordinate and assist in the process of explaining Specialized Services and placement options to current nursing home residents. (Developmental Disabilities Program)
- 4.11 Approve the quality and content of the Level II-PASARR/MR reports submitted by the Contractor and approve the monthly invoices for payment. (Developmental Disabilities Program)
- 4.12 Provide payment to the Contractor within thirty (30) days after receiving a completed, approved invoice. (Developmental Disabilities Program)

5.0 Performance Requirements

- 5.1 Level II-PASARR/MR Evaluations for new applicants to nursing home facilities will be completed within an average of 7 to 9 working days of receipt by the Contractor.
- 5.2 PASARR Annual Resident Reviews will be completed within the quarter prior to the date specified by the Department's ARR schedule.
- 5.3 Specialized Service Coordination is provided to those persons with Specialized Service Plans with a minimum of two contacts with or on behalf of the person between Annual Resident Reviews.

ATTACHMENT C

**NUMBERS OF PERSONS, SERVICES DESIRED,
AND LOCATIONS**

The number of persons, the services and locations may change as contract negotiations occur. These numbers will change as persons have different service needs or move to different communities. These numbers are the current estimates of services needed for the next biennium based on past contractual agreements and current data.

EVALUATION AND DIAGNOSIS

Provide services throughout the year to at least 300 persons that live anywhere in the state. Some services may be provided in the person’s community or may be provided in a center based setting. *This is a service which must be provided to a geographical area no smaller than a DDP Region.*

See the information following from the DDP AWACS (Agency Wide Accounting and Client System) database for the count by county of persons eligible for E&D services as of February 2007. See the information following from AWACS database for the count by county of persons who have during FY2006 or who are currently receiving evaluation and diagnosis services.

Contract funds will be distributed by DDP Service Region as follows:

DDP SERVICE REGION	FUNDING AVAILABLE FOR EVALUATIONS
Region 1	\$ 57,324.84
Region 2	\$ 75,172.67
Region 3	\$ 87,877.92
Region 4	\$ 120,699.79
Region 5	\$ 127,506.17
TOTAL E&D CONTRACTS	\$468,581.39

PASARR/MR EVALUATION & SPECIALIZED SERVICE SUPPORT

Provide services to 200 persons who receive or will be requesting nursing facility services throughout the state. *This is a service which must be provided to a geographical area no smaller than a DDP Region.* See information following from the DDP AWACS (Agency Wide Accounting and Client System) database for count by county of persons receiving PASARR Services as of February 2007.

OTHER SERVICES

In addition to the services listed above to be provided directly to persons with developmental disabilities, the Department is interested in purchasing the following system-wide services:

Information Services: Family support services information network (FSSIN) and and training resources and information center (TRIC)

Additional descriptions of these services are found in previous sections of this request for proposal package.

Attachment C
Numbers and Locations

Information for Request for Proposals for FY2008 Contracts

Persons Currently in or Waiting for DD Services

County Name	Individuals, Count Unique	County Name	Individuals, Count Unique
BEAVERHEAD	33	MEAGHER	7
BIG HORN	70	MINERAL	8
BLAINE	33	MISSOULA	439
BROADWATER	17	MUSSELSHELL	16
CARBON	51	PARK	58
CARTER	2	PETROLEUM	1
CASCADE	396	PHILLIPS	24
CHOUTEAU	29	PONDERA	22
CUSTER	136	POWDER RIVER	4
DANIELS	10	POWELL	10
DAWSON	41	PRAIRIE	1
DEER LODGE	66	RAVALLI	136
FALLON	8	RICHLAND	54
FERGUS	72	ROOSEVELT	37
FLATHEAD	318	ROSEBUD	66
GALLATIN	222	SANDERS	51
GARFIELD	4	SHERIDAN	31
GLACIER	41	SILVER BOW	220
GOLDEN VALLEY	2	STILLWATER	23
GRANITE	8	SWEET GRASS	5
HILL	93	TETON	30
JEFFERSON	64	TOOLE	18
JUDITH BASIN	4	TREASURE	2
LAKE	108	VALLEY	55
LEWIS & CLARK	381	WHEATLAND	6
LIBERTY	3	WIBAUX	1
LINCOLN	74	YELLOWSTONE	701
MADISON	16	STATE TOTAL	Sum: 4333
MCCONE	5		

Information for Request for Proposals for FY2008 Contracts

**Persons Currently in or Who Have Had
Evaluation & Diagnosis Services during FY2006**

County Name	Individuals, Count Unique		County Name	Individuals, Count Unique
BEAVERHEAD	2		POWELL	2
BIG HORN	4		RAVALLI	31
CARTER	2		RICHLAND	13
CASCADE	6		ROOSEVELT	11
CHOUTEAU	1		ROSEBUD	26
CUSTER	49		SANDERS	11
DANIELS	3		SHERIDAN	6
DAWSON	11		SILVER BOW	8
DEER LODGE	4		STILLWATER	2
FALLON	1		SWEET GRASS	1
FERGUS	1		TETON	1
FLATHEAD	56		TOOLE	1
GALLATIN	22		TREASURE	1
GARFIELD	3		VALLEY	20
GRANITE	4		WIBAUX	1
HILL	6		YELLOWSTONE	14
JEFFERSON	1		STATE TOTAL	Sum: 478
JUDITH BASIN	1			
LAKE	17			
LEWIS & CLARK	18			
LINCOLN	4			
MCCONE	3			
MINERAL	2			
MISSOULA	102			
PHILLIPS	4			
PONDERA	1			
POWDER RIVER	1			

Information for Request for Proposals for FY2008 Contracts

**Persons In DD Services or Waiting
Eligible for Evaluation & Diagnosis Services
Individual Is Five Years of Age or Younger or Nineteen Years of Age or Older**

County Name	Individuals, Count Unique		County Name	Individuals, Count Unique
BEAVERHEAD	23		MEAGHER	3
BIG HORN	43		MINERAL	6
BLAINE	28		MISSOULA	340
BROADWATER	9		MUSSELSHELL	6
CARBON	36		PARK	43
CARTER	2		PHILLIPS	20
CASCADE	287		PONDERA	17
CHOUTEAU	22		POWDER RIVER	3
CUSTER	114		POWELL	8
DANIELS	6		PRAIRIE	1
DAWSON	31		RAVALLI	90
DEER LODGE	54		RICHLAND	45
FALLON	4		ROOSEVELT	31
FERGUS	50		ROSEBUD	45
FLATHEAD	222		SANDERS	43
GALLATIN	150		SHERIDAN	26
GARFIELD	1		SILVER BOW	171
GLACIER	30		STILLWATER	13
GRANITE	6		SWEET GRASS	2
HILL	78		TETON	21
JEFFERSON	31		TOOLE	12
LAKE	90		TREASURE	2
LEWIS & CLARK	293		VALLEY	46
LIBERTY	2		WHEATLAND	1
LINCOLN	52		WIBAUX	1
MADISON	7		YELLOWSTONE	430
MCCONE	1		STATE TOTAL	Sum: 3098

Information for Request for Proposals for FY2008 Contracts

Persons Currently Receiving PASARR Services

County Name	Individuals, Count Unique	County Name	Individuals, Count Unique
BEAVERHEAD	4	MADISON	1
BIG HORN	4	MEAGHER	1
BLAINE	1	MISSOULA	10
BROADWATER	1	MUSSELSHELL	1
CARBON	3	PARK	3
CASCADE	17	PHILLIPS	1
CHOUTEAU	1	PONDERA	1
CUSTER	9	POWELL	2
DAWSON	3	RAVALLI	8
DEER LODGE	2	RICHLAND	2
FALLON	3	ROOSEVELT	3
FERGUS	13	ROSEBUD	1
FLATHEAD	10	SANDERS	6
GALLATIN	2	SHERIDAN	3
HILL	1	SILVER BOW	10
JEFFERSON	2	STILLWATER	2
LAKE	4	SWEET GRASS	1
LEWIS & CLARK	7	TETON	1
LIBERTY	1	TOOLE	1
LINCOLN	5	VALLEY	2
		YELLOWSTONE	22
		STATE TOTAL	Sum: 175

ATTACHMENT D
FEDERAL ASSURANCES

DEPARTMENT CERTIFICATION FORM

CERTIFICATION OF COMPLIANCE WITH CERTAIN REQUIREMENTS FOR DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES CONTRACTORS (June 2007)

The Contractor, **Company Name**, for the purpose of contracting with the Montana Department of Public Health & Human Services, certifies to the Department its compliance, as may be applicable to it, with the following:

- A. That the Contractor does not act in collusion with other contractors for the purpose of gaining unfair advantages for it or other contractors or for the purpose of providing the services at a noncompetitive price or otherwise in a noncompetitive manner.
- B. That the Contractor is an independent contractor; that it maintains necessary and appropriate workers compensation and unemployment insurance coverage; that it is solely responsible for and must meet all labor and tax law requirements pertaining to its employment and contracting activities, inclusive of insurance premiums, tax deductions, tax withholding, overtime wages and other employment obligations that may be legally required with respect to it.
- C. That the Contractor, any employee of the Contractor, or any significant subcontractor in the performance of the duties and responsibilities of the proposed contract, are not currently suspended, debarred, or otherwise prohibited from entering into a federally funded contract or participating in the performance of a federally funded contract.
- D. That the Contractor is in compliance with all of the privacy, electronic transmission, coding and other requirements of the Health Insurance Portability And Accountability Act of 1996 and its implementing rules as may be applicable to the Contractor.
- E. That the Contractor, if receiving federal monies, does not expend federal monies in violation of federal legal authorities prohibiting expenditure of federal funds on lobbying federal and state legislative bodies or for any effort to persuade the public to support or oppose legislation.
- F. That the Contractor, if receiving federal monies, prohibits smoking at any site of federally funded activities that serves youth under the age of 18. This is not applicable to sites funded with Medicaid monies only or to sites used for inpatient drug or alcohol treatment.

- G. That the Contractor, if receiving federal monies, maintains drug free environments at its work sites, providing required notices, undertaking affirmative reporting, et al., as required by federal legal authorities.
- H. That the Contractor manages any real, personal, or intangible property purchased or developed with federal monies in accordance with federal legal authorities.
- I. That the Contractor, if receiving federal monies, is not delinquent in the repayment of any debt owed to a federal entity.
- J. That the Contractor, if expending federal monies for construction purposes or otherwise for property development, complies with federal legal authorities relating to flood insurance, historic properties, relocation assistance for displaced persons, elimination of architectural barriers, metric conversion, and environmental impacts.
- K. That the Contractor, if expending federal monies for research purposes, complies with federal legal authorities relating to use of human subjects, animal welfare, biosafety, misconduct in science and metric conversion.
- L. That the Contractor, if receiving \$100,000 or more in federal monies, complies with all applicable standards and policies relating to energy efficiency which are contained in the state energy plan issued in compliance with the federal Energy Policy and Conservation Act.

The Contractor is obligated during the duration of the contractual relationship to abide by those requirements pertinent to it in accordance with the governing legal authorities.

Not all of these assurances may be pertinent to the Contractor=s circumstances. This certification form, however, is standardized for general use and signing it is intended to encompass only provisions applicable to the circumstances of the Contractor in relation to the federal and state monies that are being received.

These assurances are in addition to those stated in the federal OMB 424B (Rev. 7-97) form, known as "**ASSURANCES - NON-CONSTRUCTION PROGRAMS**", issued by the federal Office of Management of the Budget (OMB). Standard Form 424B is an assurances form that must be signed by the Contractor if the Contractor is to be in receipt of federal monies.

There may be program specific assurances, not appearing either in this form or in the OMB Standard Form 424B, that the Contractor may have to provide by certification.

This form, along with OMB Standard Form 424B, are to be provided with original signature to the Department's contract liaison. The Department maintains the completed forms in the pertinent purchase and contract files.

Further explanation of several of the requirements certified through this form may be found in the Department's standard Request For Proposal (RFP) format document, standard contracting requirements document, and set of standard contract provisions. In addition, detailed explanations of federal requirements may be obtained through the Internet at sites for the federal departments and programs and for Office for Management of the Budget (OMB) and the General Services Administration (GSA).

Contractor Name

By: _____ Date _____

_____ as _____
Typed/Printed Name Title

_____ Address

_____ Phone Number

_____ Federal I.D. Number

ATTACHMENT E

CONTRACTING GUIDELINES

**INCLUDES INFORMATION ON COMPLETION OF
CONTRACTING INCLUDING INFORMATION FOR BUDGET SHEETS FOR
COMPETITIVE PROPOSALS, NON-COMPETITIVE PROPOSALS AND
CONTRACT NEGOTIATIONS**

RFP LEGAL NOTICES FOR NEWSPAPERS

Notice Requesting Intent to Propose

March 16, 2007

The Developmental Disabilities Program in the Department of Public Health and Human Services will be procuring for the state fiscal years 2008 and 2009 the following services:

- 1) family support services information network (FSSIN), and training resource and information center (TRIC),
- 2) evaluation & diagnosis, and
- 3) specialized services in nursing facilities (PASARR/MR).

It is the intent of the Department to obtain these services through a Request for Proposal process. The Department is requesting parties that are interested in potentially submitting a proposal or proposals to provide one or more of these services to indicate that interest through the submission of an Intent to Propose document. The Department will only accept proposals in response to its request for proposals from parties that have submitted an Intent to Propose at the time and in the manner directed by this notice.

The Intent to Propose must be received at the Developmental Disabilities Program by March 30, 2007 at 5:00 pm. Failure to submit this document on time or submitting it with incomplete information disqualifies an interested party from submitting a proposal. The Intent to Propose must include the following information:

1. Proposer's Name and Business
2. Address
3. Telephone Number
4. Fax Number
5. E-Mail Address
6. The services which the proposer desires to provide
7. The projected number of persons to be served, if applicable (Not applicable for the automated individual information and referral system/training information and resources)
(The proposer's projected number of persons to be served may be altered during the contract negotiation phase if the party is the successful proposer.)
8. The area/region of the state to be served

A brief description of the three services follows:

- 1) FAMILY SUPPORT SERVICES INFORMATION NETWORK (FSSIN): This service provides a website and an automated database for referral to appropriate services for persons with disabilities and their families and TRAINING RESOURCE AND INFORMATION CENTER (TRIC): The Training Resource and Information Center is a

website and specialized lending library and resource assistance service whose collection of information focuses on the various aspects of developmental disabilities.

- 2) **EVALUATION AND DIAGNOSIS SERVICES:** Evaluation and diagnosis services are performed by a transdisciplinary evaluation staff to identify the presence/absence of disabling conditions, determine individual deficits, and formulate specific recommendations to address those deficits, or select treatment/intervention alternatives.
- 3) **PASARR/MR EVALUATION AND SPECIALIZED SERVICES:** Pre-admission and Annual Resident Review (PASARR) screening services are provided for persons who may have developmental disabilities, and who are seeking admission to, or residing in, nursing facilities in Montana. Specialized services must be provided to nursing facility residents who have been found to require these services through the PASARR/MR screening process.

Further detailed information concerning these services may be obtained by contacting the Department's Developmental Disabilities Program at Developmental Disabilities Program, Department of Public Health and Human Services, 111 Sanders Room 305, P.O. Box 4210, Helena, MT 59604; Telephone: (406) 444-2995. Documents should be clearly marked as Intent to Propose and be directed to Jackie Emerson in the Developmental Disabilities Program at the above address.

Proposers will be notified by April 4, 2007 of the status of their proposal. The deadline for the submission of proposals is April 19, 2007.