



**REQUEST FOR PROPOSALS**

**Sage Seniors Association**

**Health Services for Seniors – Mobile Health Service Providers**

**15 Sir Winston Churchill Sq, Edmonton, AB, T5J 2E5**

**RFP Issue Date: July 6, 2018**

**RFP Closing Date and Time: July 31, 2018 at 2pm MST**

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## 1. INTRODUCTION

### 1.1. Preamble

Proponents are invited to submit proposals for the provision of services in accordance with the specifications, term and conditions set out in this RFP.

This competitive procurement will be conducted in accordance with one fundamental objective: to maximize the benefit to the Association while offering proponents a fair and equitable opportunity to participate.

Proponents are advised to pay careful attention to the wording used throughout this RFP. Failure to satisfy any term, condition or mandatory requirement of this RFP may result in rejection of the proposal.

### 1.2. Contact

Inquiries related to this RFP, including any requests for information or clarification may be directed in writing to the following person, who will respond before the closing date. Inquiries and responses will be recorded and posted or otherwise distributed to prospective applicants.

Interested Proponents should indicate their interest in submitting a Proposal by providing their email contact information to the following person, so that they can be added to the RFP question and response distribution list.

Duncan Maguire, Health Services Team Lead  
[dmaguire@mysage.ca](mailto:dmaguire@mysage.ca)  
15 Sir Winston Churchill Sq NW, Edmonton, AB, T5J 2E5

The cut-off date for submitting questions related to this RFP will be July 27<sup>th</sup> at 4pm MST. Questions received after this time may not be answered.

### 1.3. Scheduled Site Visit and Information Session

A site visit and information session for prospective applicants will be held on:

Tuesday July 17<sup>th</sup>, 2018 – 1pm  
Sage Room, 3<sup>rd</sup> Floor, 15 Sir Winston Churchill Sq NW, Edmonton, AB, T5J 2E5

Attendance is optional. Questions will be allowed at the meeting and will be recorded and posted or otherwise distributed to prospective applicants.

### 1.4. RFP Definitions

“Association” means Sage Seniors Association.

“Contract” means the written agreement between the successful Proponent and the Association to provide the Services contemplated by this RFP.

“Contractor” means the legal entity that will enter into the Contract with the Association.

“Evaluation Team” means individual who will evaluate the Proposals on behalf of the Association.

“Mobile Health Service Provider” means for the sake of this current opportunity, professionals able to provide the following services: Mobile Optometrist, Mobile Foot Care Nurse, Mobile Dental Hygienist, Mobile Denturist.

“Proponent” means an individual, organization, or Proponent Team responding to this RFP with a proposal.

“Proponent Team” means two or more individuals and/or organizations that together submit a proposal.

“Proposal” means the Proponent’s response to this RFP, and includes all the Proponent’s attachments and materials.

“Request for Proposals” or “RFP” means this solicitation for the Services.

“RFP Closing Date and Time” means the date and time as stated on the cover page of this RFP.

“Services” means the work, duties, functions and deliverables to be provided by the Contractor.

“should” or “desirable” means that a provision so described has a significant degree of importance to the Association and will be scored in the evaluation of the Proposal.

## **2. PROJECT INFORMATION**

### **2.1. Program Overview**

In collaboration with the University of Alberta, Faculty of Nursing, Sage Seniors Association is providing a new model of primary health care services. We are looking for assistance in addressing a wide array of seniors’ health services in addition to the health care services offered on site by Nurse Practitioners.

We are seeking mobile health care providers who are committed to working collaboratively to meet the primary health care needs of seniors in Greater Edmonton, particularly those with complex needs, through an innovative model of interdisciplinary service delivery at Sage. We are particularly interested in working with health professionals that are familiar with seniors' health, and who fully understand the opportunities and challenges of providing service to seniors.

Mobile Health Service Providers sought: Mobile Optometrist, Mobile Foot Care Nurse, Mobile Dental Hygienist, Mobile Denturist.

The contract period is from September 1, 2018 to August 31, 2019. Before the contract end date, renewal may be considered.

The Health Services for Seniors program continues until March, 2020. In the event that Health Services at Sage continues after March, 2020, there is potential for contract renewal with the successful firm.

## **2.2 Organizational Background/Overview**

Initially incorporated as the Society for the Retired and Semi-Retired in 1970, Sage has developed over the past decades into a city-wide seniors' organization with one goal in mind: making sure every senior in Edmonton is living their best life possible. At Sage, seniors do as much as they can, as well as they can, as long as they can. Our collaborations and partnerships, innovative social and health services, and life enrichment programs all stem from the belief that every senior in Edmonton should live as full, healthy and adventurous a life as possible.

Sage's mission is inspiring and supporting seniors to be the best they can be. Our vision is a community where all seniors are valued and have the opportunity to live according to their beliefs, abilities and aspirations.

## **2.3 Current Situation**

Health Services for Seniors is an innovative, person-centered service that aims to achieve positive health and wellness outcomes for low-resourced seniors through utilization of Nurse Practitioners and allied health and human services professionals. This is achieved through collaborative, evidence-based service delivery and case coordination of health, social and recreation supports.

Research indicates that integrating direct delivery of social support services (e.g. income supports, housing, transportation, recreation programming, system navigation, outreach, immigrant/refugee services – services currently provided at Sage) with Nurse Practitioner service improves health outcomes for clients. This Demonstration Program will provide an opportunity for clients and decision makers to experience, examine and analyze the positive outcomes associated with this new model of primary health care, which could be used as an exemplar for similar practices throughout the province.

Health Services for Seniors builds on Sage's existing social services and life enrichment activities and programs for seniors, as well as the clinical knowledge and staff from the Faculty of Nursing at the University of Alberta.

*Target Population:*

Health Services for Seniors aims to more effectively meet the health and social needs of low-resourced older adults. Low-resourced is defined as those who are marginalized or hard to reach, such as: homeless or at risk of homelessness; living with a disability; living with chronic health conditions; living with a mental health condition; newcomers or from ethno-cultural communities; living in poverty; and those with limited informal caregiving support from family and friends. It is estimated that Health Services for Seniors will serve approximately 5,500 seniors annually across the proposed spectrum of services.

*Objectives:*

The Health Services program aims to evaluate a new model of person-centered primary health care services that integrates inter-professional education, collaborative practice and formalized evaluation within a community setting. Other objectives for the program include examining the economic impact of the model and the potential for a sustainable funding model to address the anticipated increased seniors' population, while improving the achievement of outcomes from these services through continuous monitoring and improvement.

**2.4 Contract Scope**

The purpose of this RFP is to solicit a written proposal and a statement of qualifications from interested Proponents. The Association is seeking organizations and/or individuals to provide part time mobile health services to seniors at Sage. As this is a demonstration project, services may be renewed contingent on funding allotment. Initially, services shall be provided until March, 2019.

The Association intends to enter into an independent contractor relationship. The Contractor is solely and entirely responsible for its acts and those of its agents, employees and sub-contractors during the performance of the contract. The contractor may not assign its obligations under the Contract without the express, written consent of Sage. All providers will be required to be properly licensed and be in good standing to practice their profession in Alberta.

The ideal Contractor will be able to demonstrate experience and competence working in an interdisciplinary team environment, as well as providing care in a setting without direct supervision. The most desirable candidates will have experience working with seniors. The number of days where services will be provided is subject to change, depending on the demand of the target population. We will work with provider to determine the most appropriate frequency and timing of service delivery.

As this is a demonstration project, evaluation is a key component of the service delivery by mobile health professionals. As such, the successful Contractor will be expected to provide input to the quarterly evaluation and assessment of the program. The program should be evaluated on both quantitative and qualitative measurements, such as number of clients seen, and general client satisfaction.

Sage reserves the right to, at any time, terminate the contract in its entirety at its discretion if such termination is deemed by Sage to be in the program's interest. Termination of the contract by either party may be enacted with 14 days written notice. In the event the contracted mobile service provider acts in breach of a provision of the Association's Contracted Agreement, the Association may terminate the agreement without any notice.

### **3. RESPONSIBILITIES AND MINIMUM REQUIREMENTS**

#### **3.1. Contractor Responsibilities**

The Contractor will be required to assume responsibility for all contractual activities offered in the proposal whether or not that Contractor performs them. If any part of the work is to be subcontracted, responses to the RFP must include a list of subcontractors including the name and address, the name of the contact person, a complete description of the work to be subcontracted, and information concerning the subcontractor's organization and abilities. The Association will consider the selected Contractor to be the sole point of contact with regard to contract matters, including payment of any and all charges resulting from the award.

The Contractor shall, at its own expense, obtain and maintain throughout the Term, General Liability insurance in an amount not less than two million dollars (\$2,000,000.00) per occurrence for death, bodily injury, property damage, and personal injury. If appropriate, contractor will provide proof of medical malpractice insurance in an amount appropriate for practice in their designated field.

The Contractor shall, upon request of the Association, provide the Association with proof of the existence of such insurance in the form of a certificate of insurance or such other form acceptable to the Association's Executive Director.

The Contractor will be required to assume responsibility for all specialized equipment and supplies that they require in order to delivery services. This equipment and supplies must be mobile and will not be stored on the Association's premises.

The Contractor will be required to sign the Association's Confidentiality Agreement. Any onsite Mobile Service Health Providers will need to complete a satisfactory Police Information Check. The presence of a criminal record does not automatically disqualify an individual from a position. The Executive Director will assess each situation to determine the extent of risk the individual would pose.

#### **3.2. Association Responsibilities**

The Association will be responsible for providing the contracted mobile service provider(s) with a medical examination room with telephone access to provide services, as well as housekeeping and waste removal. The Association will also be held responsible for providing client scheduling services, and being the primary telephone contact for clients accessing the mobile provider. Available hours of operation for the health services space are currently Monday through Friday, 8:30 AM to 4:00 PM. The Association will not be responsible for providing the contracted medical provider with medical consumables.

### **3.3. Minimum Qualifications**

All proposals will be reviewed to determine whether or not the Proponent has met the minimum qualifications and requirements as specified below. Failure to satisfy the following qualifications may result in disqualification of the Proponent's Proposal:

- Bidder must provide a description of relevant experience, professional qualifications, and education.
- The organization/individual must have experience of providing the services for which they are applying.
- The organization/individual must provide proof of insurance and possess all the necessary licenses, permits, approvals, and authorizations necessary in order to conduct the services for which they are applying.

## **4. PRICING**

### **4.1. Fee Structure and Compensation**

Contractors will bill appropriate insurance bodies directly, as appropriate. Contractors will detail any non-insured costs that will be borne by the senior. Contractors are required to provide the Association with fee structures and any proposed increases for approval. All fees will be in-line with market norms and the Association retains the right to cancel contracts if fee structures are not aligned with the market for comparable services in Edmonton or the fee structure recommend by the appropriate professional college. We ask that you articulate your fee structure in your proposal.

The Association recognizes that the revenue model for different types of professional's/service providers varies and we are committed to working with providers to identify a financial model for the program that meets the needs of the seniors, the Contractor, and the Association. As articulated in the RFP, the Association will provide significant value (e.g. newly constructed exam room, reception and appointment scheduling services) for Contractors and we need to ensure that the Association is appropriately compensated. However, we also recognize that we need to find a balance relative to risk and cost so that our Contractors are able to run a successful business.

As such, we request that Proponents articulate their preferred compensation model in their RFP. This may include a graduated compensation structure as the new program continues to grow and increase the number of program participants.



## 5. PROPOSAL

### 5.1. Submission Procedure

The Proponent will submit a Proposal. Proposals must clearly demonstrate that they meet the minimum requirements set out in Section 3.3. The Proposal shall contain the following information:

- Organization Information (if applicable): Provide agency's name, address, URL (if applicable), telephone and fax numbers. Include name, title and e-mail address of the individual who will serve as agency's primary contact.
- A one-page cover letter with a brief description and history of the Proponent.
- The experience and qualifications of the organization or individual,
- A list of similar sites where services were provided to demonstrate experience and knowledge.
- Incorporate items included in the bullet points under Selection Process and Criteria listed below.
- A brief description of the market for your provided service
- As described in the Compensation section, please provide a description and rationale for your fee structure (un-insured cost to seniors you serve), as well as your preferred compensation structure to reimburse the Association for the services provided in the contract and the rationale behind the proposed structure.

Proposals may be submitted electronically in PDF format or mailed to the Contact listed on the cover page.

### 5.2. Multiple Proposals

If a Proponent submits more than one Proposal, the Proponent must submit each Proposal separately in the same format as outlined in this RFP. The Evaluation Team will decide the acceptability of each Proposal separately.

### 5.3. Closing of the Proposal

Proposals must be received by the deadline listed to be considered. Incomplete Proposals will not be reviewed.

The opening of Proposals will be closed to the public.

## 6. EVALUATION

### 6.1. Selection Process and Criteria

Each firm/individual submitting a response to the RFP will be evaluated by the Evaluation Team using the following criteria:

**1. Program Approach (30 points)**

- a. Does the bidder's proposal include all the following required information in a clear and concise manner? Does the program approach align with the description of Sage's current services, values and approach to service?
- b. Overall scope of work, terms and conditions of services to be provided (supervision, consulting services)
- c. Number of years' experience providing routine care to patients,
- d. Ability to develop and participate in evaluation and quality assurance monitoring activities related to their specific profession and service.

**2. Fee and Compensation Proposal (30 points)**

- a. Does the applicant provide a fee structure for services provided to the senior that are not covered by public insurance programs?
- b. Does the applicant clearly articulate a compensation structure to ensure that Sage's costs for space and services (e.g. reception, appointment booking) are covered? Does the proposal articulate the change in this structure over time?
- c. Are the fee and compensations structures competitive and appropriate?

**3. Applicant Qualifications (40 points)**

- a. Health services – Experience and years in service, references from similar organizational relationships. **(15 points)**
- b. Experience working with similar organizations, specifically those that serve seniors. **(15 points)**
- c. How will customer service be provided to Sage? For example, how often will the Contractor be available? Is the Contractor able to commit to the to-be-determined schedule? **(10 points)**.

**6.2. Negotiations**

The Association reserves the right to negotiate with any Proponent submitting a Proposal to alter, clarify, and enhance the Proposal and any contract arising out of acceptance of the Proposal.

**6.3. Proposed Timeline**

RFP Issue Date: July 6, 2018

Proponent Site Visit and Information Session: July 17, 2018

RFP Closing Date and Time: July 31, 2018 at 2pm Mountain Time

Evaluation of Proposals: August 6-10, 2018

Shortlist Interviews: August 13-20, 2018  
Selection of Proponents: August 20-24, 2018  
Launch of Services: September, 2018

These timelines are subject to change at the sole discretion of the Association.

## **7. TERMS AND CONDITIONS**

### **7.1. Access to RFP Documents**

Proponents are encouraged to ask questions regarding this opportunity to help develop their Proposal.

Inquiries and responses to this RFP will be recorded and posted or otherwise distributed to prospective applicants before the closing date.

### **7.2. Proposal Alterations**

Proponents may amend or rescind their Proposal before the RFP Closing Date and Time by submitting a written notice to the Association.

### **7.3. Period of Commitment**

Proposals shall be final and binding on the Proponent for ninety (90) days from the RFP's Closing Date and Time. The Proposal shall be used as the basis for the Contract.

### **7.4. Proposal Irregularity or Non-Compliance**

The Association reserves the right to waive an irregularity or non-compliance with the requirements of this RFP where the irregularity or non-compliance is minor or inconsequential. The determination of what is or is not a minor irregularity or non-compliance shall be at the Association's sole discretion.

### **7.5. Confidentiality and Security of Information**

The Proponent shall keep strictly confidential all information concerning the Association or third parties, or any of the business or activities of the Association or third parties acquired as a result of participation in the RFP.

### **7.6. Conflict of Interest**

On or before the Closing Date and Time of this RFP, Proponents must fully disclose to the Contact, in writing, the circumstances of any actual, possible or perceived conflict of interest in relation to the Proponent, or any employee, if the Proponent were to become the Contractor pursuant to this RFP.

**7.7. Extension, Amendment or Cancellation of RFP**

The Association may extend the RFP Closing Date and Time, or the Association may amend, suspend, postpone or cancel this RFP.