

RFP Response Form

RFP for Providers for Older Adults Protective Services

PROPOSER INFORMATION

Proposer Name: Eastern Area Adult Services, Inc.

Authorized Representative Name & Title: Linda Doman, Executive Director

Address: 607 Braddock Avenue, Turtle Creek, PA 15145

Telephone: 412-829-9250

Email: ldoman@eaas.net

Website: www.eaas.net

Legal Status: For-Profit Corp. Nonprofit Corp. Sole Proprietor Partnership

Date Incorporated 1983

Partners and/or Subcontractors included in this Proposal: None

How did you hear about this RFP? DHS notification

REQUIRED CONTACTS

	Name	Phone	Email
Chief Executive Officer	Linda Doman	412-829-9250 ext.123	ldoman@eaas.net
Contract Processing Contact	Linda Doman	412-829-9250 ext.123	ldoman@eaas.net
Chief Information Officer	Linda Doman	412-829-9250 ext.123	ldoman@eaas.net
Chief Financial Officer	Barbara Kuhn	412-829-9250 ext.125	bkuhn@eaas.net
MPER Contact*	Barbara Kuhn	412-829-9250 ext.125	bkuhn@eaas.net

* [MPER](#) is DHS's provider and contract management system. Please list an administrative contract to update and manage this system for your agency.

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BOARD INFORMATION

Provide a list of your board members as an attachment or in the space below.

Kevin O'Connell, President	Eat'n Park Hospitality Group
Laurie DuChateau, Vice President	Conduent HR
Harold Miller, Treasurer	Future Strategies, LLC
Mary Smith, Secretary	Community Volunteer
Paul Costa	PA State Representative
Randy Detweiler	Highmark, Inc.
Anita Dwyer	Cura Hospitality
Janelle Johns	Forbes Family Medicine
George Polnar	Springdale Police Chief

Board Chairperson Name & Title: Kevin O'Connor, Senior Vice President, Marketing, Eat'n Park Hospitality Group

Board Chairperson Address: [REDACTED]

Board Chairperson Telephone: [REDACTED]

Board Chairperson Email: [REDACTED]

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization.

Please do not use employees of the Allegheny County Department of Human Services as references.

1. James V. Sammarone
Sr. Vice President / Relationship Manager
Citizens Bank of PA
Cell Phone: [REDACTED]
Email: [REDACTED]

2. Morgan Adamson
Chief Operating Officer
Enkompas Technology Solutions
Phone: [REDACTED]
Email: [REDACTED]

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3. Hailey Juliano
Regional Manager
Community LIFE
Phone: [REDACTED]
Email: [REDACTED]

Date Submitted 11/14/2018

Amount Requested: \$866,666

Proposal Abstract:

Please limit your response to 750 characters

Eastern Area Adult Services, Inc. (EAAS) is a non-profit organization serving older adults and their families. Incorporated in 1983, EAAS has provided a wide range of community services and has the necessary knowledge and experience to provide older adult protective services. EAAS has been a provider of protective services for 29 years with a strong investigative team built on collaboration and support. The staff work cooperatively with different disciplines and facilities involved in investigations and partners effectively with the Area Agency on Aging. EAAS is proposing to serve up to two of the three zones. Recent innovations include evidenced based training in motivational interviewing funded by the Jefferson Regional Foundation.

CERTIFICATION

Please check the following before submitting your Proposal, as applicable:

- I have read the standard County terms and conditions for County contracts and the requirements for DHS Cyber Security, EEOC/Non-Discrimination and HIPAA.
- By submitting this proposal, I certify and represent to the County that all submitted materials are true and accurate, and that I have not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

ATTACHMENTS

Please submit the following attachments with your Response Form. These can be found at <http://www.alleghenycounty.us/dhs/solicitations>.

- MWDBE documents
- Allegheny County Vendor Creation Form
- 3 years of audited financial reports
- W-9
- Budget and budget narrative, as desired

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REQUIREMENTS

Please respond to the following. The maximum score a Proposal can receive is 115 points. Your response to this section should not exceed 20 pages.

Indicate the geographic service area zones (see RFP appendices A and B) for which you are proposing to serve: Eastern Area Adult Services is proposing to serve up to two of the three zones. Zone 2 is the preferred first zone; Zone 3 is the preferred second zone.

Organizational Experience (30 points possible)

1. Describe your organization's experience working with adults age 60 years and older.

Eastern Area Adult Services, Inc. (EAAS) is a private, non-profit organization committed to serving older adults and their families, supporting their capacity to maintain independence and wellness in homes and communities by providing quality information and services that address their changing needs.

EAAS incorporated as a private, nonprofit organization on July 1, 1983. Prior to 1983, the organization provided ten years of services to older adults as part of local government. From 1972 – 1974, it operated under Model Cities, a federal urban aid program. From 1974 – 1983, it was part of the Allegheny County Department of Adult Services, the designated Area Agency on Aging, and operated the first senior center in the county.

Throughout its' 45 year history, EAAS has provided a wide range of community based services from adult day services to care management to protective services. Over the years, services offered have changed according to the landscape of aging services. EAAS Turtle Creek Senior Center is currently pursuing accreditation from the National Institute of Senior Centers with its evaluation site visit scheduled for December 2018. EAAS was a successful provider in the October 2016 request for proposals to deliver home care services under the Allegheny County Area Agency on Aging OPTIONS program.

2. Describe your organization's experience with and knowledge of the supports available to older adults within the human services system and within other community-based resources.

EAAS currently provides the following services exemplifying the organization's experience with and knowledge of supports available to older adults:

Home Care: Home care services are provided to seniors who need assistance with personal care, bathing, preparing meals, and homemaking. Services are provided daily, weekly, or on an as needed basis to provide caregivers with respite. Staff has been screened, trained, and bonded. Funding is provided by private fees and contracts including the Veterans Administration, private pay, and the Allegheny County Area Agency on Aging (AAA) Options program. An average of 43 trained home care

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aides cared for 503 older adults over the past year. EAAS Home Care is a member agency of the PA Home Care Association and received 100% compliance with its 2018 OPTIONS monitoring.

Senior Center Services: EAAS has three senior center locations—Turtle Creek, Braddock Hills, and Swissvale. Centers offer education programs, health and wellness activities, volunteer opportunities, nutritious meals, and information on programs available for older adults. The Turtle Creek Senior Center is applying for accreditation from the National Institute of Senior Centers with its evaluation site visit scheduled for December 2018. Funding is provided by donations, fees and the AAA. An average of 97 people per day is served through the three centers.

Meals on Wheels: Meals on Wheels are delivered to adults age 60 and older who need a daily meal and contact to assist them in remaining independent at home. This service is provided on a long-term basis for those with a disability or on a short-term basis for those rehabbing from a temporary illness or injury. Funding is provided by donations, fees, Community Health Choices and the AAA. Fifty volunteers and three staff package and deliver meals three times per week to 220 participants. EAAS is part of a six-member county wide collaborative with the goal of identifying changes of condition in participants to avoid hospitalization and to increase capacity to work with health systems and managed care.

Protective Services: EAAS is one of three current contracted providers of the AAA to perform investigations of abuse under the PA Protective Services Act. Investigators perform assessments of needs and monitoring of frail, vulnerable older adults. The AAA provides funding for this program. EAAS has been providing protective services for the past 29 years. This department is consistently compliant with regulations as monitored monthly by the AAA.

EAAS protective services staff adhere to the guidelines of the protective services act in support of the client's right to self-determination. The investigators work to remove risks in the least restrictive way possible and towards a satisfactory resolution for the older adult. The staff work cooperatively with the different disciplines and facilities involved in investigations and partners effectively with the AAA.

Service Coordination: EAAS provides social workers to assist residents of housing facilities with linkages to resources, education and wellness activities and to work closely with residents in crisis situations. Funding is provided by the senior housing facility. Two hundred twenty residents in four facilities are coordinated; the facilities are located in Braddock Hills, East Liberty, Turtle Creek, and Plum.

Through each of these programs, EAAS has developed relationships with community-based resources and participates in local provider groups such as the Mon Valley Providers Council and the Braddock Community Partnership. EAAS has the necessary knowledge and experience with healthy aging, common medical issues associated with aging, aging in place, caregiver issues, and home safety.

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3. Describe your organization's experience working within the criminal justice system.

Through the protective services investigations, EAAS staff have worked with the criminal justice system in the following ways:

- Requesting police to do a wellness check on an older adult
- Requesting police to accompany an investigator on a visit where there are safety concerns
- Requesting police to assist with gaining access to a home
- Contacting the Allegheny County Law Department when access to a person or relevant records is denied
- Testifying at guardianship hearings as needed
- Contacting the District Attorney's office as needed usually related to financial exploitation case
- Reports of deaths for open cases are made to the Allegheny County Medical Examiner's office and local police

Other programs at EAAS have minimal interaction with the criminal justice system. At times, police departments may need to be in touch with an employee. Programs such as home care and Meals on Wheels may need to call police in the event of an emergency or for a wellness check on a client.

4. Describe the approaches your organization employs to ensure your staff is responsive to a diverse population. Include cultural competency trainings you provide to your staff about working with individuals of different backgrounds in areas such as ethnicity, religion, national origin or ancestry, English language ability, sex, gender identity or expression, sexual orientation, disability, incomes and marital status.

The EAAS Board of Directors has established policies against discrimination and harassment that applies both to employees and those served by the agency. These policies are reviewed in new employee orientation and acknowledged by signature of the new employee. Also during orientation, the demographics of those served by the agency and specific programs are reviewed.

Staff attend training opportunities in the community when their schedule allows. For example, on November 15, 2018, three protective services staff will be attending a session entitled Implicit Bias Training. The Mon Valley Providers Council and Black Women for Positive Change are hosting this training. It is a training by Pittsburgh police officers in order to improve community relationships and deepen understanding of recognizing and addressing unconscious or subtle biases based on characteristics such as race, ethnicity, age, and appearance. Past trainings attended have included sessions on the LGBTQ community as well as working with other individuals of different backgrounds.

Through its current protective services contract, investigators can request an interpreter and/or translator through the AAA for any cases involving a communication gap. For any participants that are hearing impaired and need communication assistance, EAAS would contact the Center for Hearing & Deaf Services. For any participants that are visually impaired and need communication assistance, EAAS would contact the Blind and Vision Rehabilitation Services of Pittsburgh.

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Protective Services Management (75 points possible)

5. Describe your staff plan for Protective Services. Include your desired qualifications for Investigators and Supervisors, how you will recruit and retain staff, and your strategy for staff supervision.

EAAS has been a protective services provider in Allegheny County for 29 years. The current staffing structure includes a supervisor with 10 years of experience and four investigators with ten, eight, two, and one year(s) of experience.

If EAAS is awarded a contract for one region, the staff plan is to have one full-time supervisor, four full time-investigators, and one half-time case aide. If EAAS is awarded a contract for two regions, there will be a full-time supervisor and a full-time assistant supervisor covering both regions, eight full-time investigators each generally assigned to a specific region, and one full-time case aide. On-call responsibilities will be rotated among all investigators to provide 24-hour coverage seven days per week.

This staffing plan will allow the four investigators to carry 15 – 20 cases per month for a range of 60 – 80 investigations per zone as based on the statistics provided in the request for proposal. The supervisor is also available to pick up cases as needed. This plan also allows for the flexibility needed to cover when investigators are off.

Qualifications for the supervisor and assistant supervisor include a Bachelor degree in social work or related field and a minimum of three years of direct aging casework. Qualifications for investigators include a Bachelor degree in social work or related field and a minimum of one year of direct aging casework. Qualifications for the case aide include a minimum of an Associate degree, or related experience, and demonstrated competence in data entry and administrative support.

Staff are recruited through Indeed and Facebooks ads. Local job boards are utilized as needed such as the Non Profit Talent website. Other online vehicles and community outreach can be used as needed.

All potential candidates have a criminal history check with the PA State Police. If the candidate has not lived within Pennsylvania within the past two years, an FBI check is also completed.

Newly hired investigators accompany all existing investigators on visits to observe and learn procedures and interaction techniques. All new investigators follow this shadowing procedure for a two to four week period as evaluated by the supervisor. All new investigators must complete the three day Protective Services Basic Training.

Staff retention strategies include a competitive salary, paid time off, health insurance, ability to work from home one day per week, and ongoing support from the full investigative team and supervisor.

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Investigative staff will be supervised and supported by the program supervisor who is accessible daily as needed. Weekly supervisory meetings will also be held where the supervisor and investigator review cases and plans of care.

6. Describe your plan to train Protective Services Investigators and Supervisors. Include your requirements for the state-mandated training and the types and the number of hours of any additional or ongoing training.

All new staff serving as investigators, case aides, and supervisors will participate in the three-day state-mandated training covering protective services casework and investigations through the PDA Protective Services Basic Training as offered through Temple University. First-time protective services supervisors will attend a one-day supervisor training offered through Temple University.

All staff will attend the annual state-mandated protective services training and will attend the five-year refresher training as appropriate.

All staff, including the case aide, will be proficient in SAMS and will attend trainings as needed. SAMS trainings are routinely offered with a basic class and an advanced class of two hours each.

All staff have access to training opportunities offered locally that will enhance their skills and knowledge of services and working with older adults. For example in October 2018, two investigators were able to attend the Area Agency on Aging annual conference. In addition to the one-hour general session on Re-Imaging Aging, the one hour sessions attended were understanding and assisting older adults with mental illness, the needs of elder orphans, and compassion fatigue.

7. Please describe how you would respond to the following four scenarios.

A. Report: Norm has been diagnosed with dementia that is becoming worse. Norm is not able to perform Activities of Daily Living (ADLs or ADL) without hands-on help and would not know what to do if there was an emergency. It is not safe for Norm to be left home alone for any period of time. However, Norm's wife and sole caregiver, Diane, has been hospitalized leaving Norm home alone. Diane is extremely worried about Norm being home alone.

First Visit: When the Investigator arrived at Norm and Diane's home, Norm came to the door and willingly invited the Investigator into the home without asking for any identification. The Investigator saw that the home was very cluttered with stacks of magazines, newspapers, and other reading material which filled most of the space in the hallway and living room where the Investigator met with Norm. Although there was a path to the front door, it would be very difficult to navigate in the event of an emergency. The Investigator also noticed bottles of what appeared to be urine cluttered throughout the living area and a strong smell of urine present in the home. Norm appeared to be sleeping on a couch in the living room because the stairway was completely blocked and the couch had a blanket and a pillow on it and was the only area that was not cluttered. The

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Investigator inspected the kitchen and found rotting food in the microwave, refrigerator, and on the kitchen table, which also was very cluttered with papers. The Investigator noticed that the gas on the stovetop was left on and there were newspapers on the counter top very close to the lit stove. The Investigator inspected the bathrooms and found the toilet to be clogged with urine and feces. There were towels and toilet paper in the toilet bowl and on the floor with feces on them. All utilities in the home were functioning, although there were several burnt out lights in the home that had not been replaced.

What steps should the Investigator take in this situation?

The investigator will arrange a visit as soon as possible with the OAPS nurse to assess Norm's capacity.

Simultaneously with the consultation of the OAPS nurse, the investigator will:

- Turn off the gas on the stovetop and remove the newspapers from the area of the stove.
- The investigator should make efforts to locate any family who may be able to assist.
- Due to the concerns found in the home, offer placement in a facility to Norm until his wife returns home.
- If there are concerns about Norm's physical condition, an ambulance should be contacted so that Norm can be medically evaluated in the emergency department. Discharge could then be made to a facility to ensure his care until the wife returns home.
- Do an initial assessment of Norm's capacity to determine if he would know what to do in the event of an emergency for example, either evacuate the home or call 911. His wife reported that he would not know what to do. If Norm appears to be very confused and unable to answer questions appropriately, the investigator should take steps to ensure that the older adult is in a safe environment. The investigator should talk to Norm about accepting assistance.
- If Norm refuses and the concerns are great enough, a Section 302 Involuntary Commitment for inability to care for self should be initiated.
- If Norm is deemed to have enough capacity to get help in an emergency and refuses to leave his home, the investigator should respect that but take some steps to reduce imminent risk such as providing the older adult with food that requires little to no preparation and finding a plumber to unclog the toilet. The investigator may also want to contact the local fire department to see if the stove can be disconnected. Investigator should check in on Norm regularly, every couple of days, to ensure the he remains safe.

Once his wife has returned home and Norm has returned home if he left, the investigator can work with them to develop a care plan to assist them with services that are available to clean up their home. Chore services could be ordered through the AAA to do a major initial clean up and then service can be put into place so that somebody is coming in on a regular basis to assist with personal care needs and housekeeping services. Meals on Wheels should also be ordered for both.

B. Report: Martin has been diagnosed with Parkinson's Disease and has some short-term memory impairment. Martin lives in ABC Nursing Facility and requires hands-on assistance with physical care needs. His doctor ordered that two people assist with transferring Martin. One day, a nursing facility

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caregiver, Daphne, attempted to transfer Martin by herself. To do so, she first purposefully dropped Martin on the floor. Martin was in visible pain and was taken to the hospital. X-rays showed that Martin broke his leg.

First Visit: After Martin was discharged from the hospital for his broken leg, the Investigator visited him at ABC Nursing Facility. The Investigator discussed the incident with Martin, but Martin had a difficult time remembering exactly what happened due to his memory loss issues. During the visit, Martin had his leg in a cast and was lying in bed. He appeared to be clean and was eating lunch.

What steps should the Investigator take in this situation?

Once the investigator arrives at the ABC Nursing Facility and meets with Martin, the investigator should discuss with him the specific allegations, how his care and treatment at the facility is, and if he has any additional concerns. It should also be determined if Martin is his own decision maker.

The investigator should next meet with the Director of Nursing or the Administrator. The investigator should request all relevant documentation as well as what actions the nursing facility took towards the caregiver, Daphne. The investigator should determine if there were any witnesses present at the time of the injury and interview them. The investigator should also request documentation about what actions the caregiver took once Martin was on the floor and who assessed the Martin prior to being sent to the hospital.

The family and the doctor should also be contacted to ensure that there are no other concerns regarding Martin's care at the facility. If the hospital staff are not aware of the allegations against the ABC Nursing Facility, they should be informed and records should be requested.

Due to the serious injury and the evidence, this case would likely be substantiated and the ABC Nursing Facility would need to show that appropriate action was taken in regards to the caregiver. The investigator would want to see, at the least, that the caregiver is retrained on how to find and implement transfer orders and all other doctor orders that direct the type of care that Martin is to receive. Once that information is received, a plan of care for Martin's continued safety will be developed. A reassessment visit should be planned with Martin to ensure that there have been no other issues or concerns.

C. Report: Arthur has been diagnosed with chronic obstructive pulmonary disease and heart failure. He uses oxygen 24/7 and experiences some memory issues. Arthur is unable to perform ADLs independently and requires hands-on assistance with ADLs and medication management. Arthur lives with his niece, Janet, who has taken over his finances and helps with his ADLs. However, Arthur is not eating proper meals and is losing weight. He is wearing stained clothing and has a body odor. Janet is not making sure that Arthur is taking his daily medications correctly. Janet has been transferring money from Arthur's accounts into hers without permission. She has opened credit cards and has been purchasing items online using Arthur's name. Arthur is now behind on utility payments and is receiving past due notices. Janet usually is in the house and will not allow in-home

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service provider staff to speak with Arthur alone. At times, Janet attempts to threaten or intimidate Arthur and provider staff.

First Visit: The Investigator knocked on the front door several times with no answer. The Investigator could hear people in the house talking, but could not make out what they were saying. After several more attempts, Janet answered the door and asked for identification. After the Investigator identified herself and showed her identification, Janet reluctantly allowed the Investigator into the house. The house was in good condition—clean and apparently well kept—but with a strong smell of cigarette smoke present. Arthur was sitting in the living room watching television while using oxygen and smoking a cigarette. Janet also was smoking. The Investigator asked Janet to leave the room so she could speak with Arthur alone. Janet refused and said, “I should be able to hear anything you say to Arthur.” The Investigator asked Arthur if it would be acceptable for Janet to remain in the room during the conversation. Arthur looked at Janet first before addressing the question and nodding yes.

What steps should the Investigator take in this situation?

It is clearly important to try to speak with Arthur in private. The investigator would have concerns with the report of intimidation and the looks exchanged by Arthur and Janet. The investigator should talk with Arthur in Janet’s presence but attempt to write a note to Arthur without Janet’s notice to see if Arthur is afraid. The doctor’s office should be notified of Arthur and Janet smoking while the oxygen is in use.

The investigator should also follow up with an OAPS nurse visit so that the nurse can assess Arthur while the investigator engages Janet. The nurse can then assess Arthur’s capacity and if he is afraid without Janet being aware.

If Arthur is found not to have capacity to make his own decisions:

- A referral should be made to a financial exploitation consultant and another joint visit should be made with this consultant so that he/she would be able to meet with Arthur hopefully without Janet’s intrusion. If financial concerns are found, the financial exploitation consultant would be able to meet with the District Attorney’s office to determine if charges can be filed against Janet. Efforts should be made to remove Arthur from Janet’s care during at time.
- If there are concerns that Arthur is not receiving adequate care, Janet should be informed that steps need to be taken to ensure that he is receiving adequate care within a certain time frame, one to two weeks. If Arthur’s needs are not met by that time, the Allegheny County law department should be notified to see if this is a case that should be pursued for guardianship.

If Arthur is capacitated, we would need to respect his decisions to remain with Janet even when alternatives are offered and concerns exist.

D. Report: Marjory has been diagnosed with dementia and has severe cognitive impairment and a poor memory. Marjory requires assistance with all ADLs and lives with her nephew, Lenny. Lenny is

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Marjory's primary caregiver. He has been reluctant to accept any outside services for Marjory saying that he can "do it alone." Marjory has a bruise on her arm that resembles a hand print, but is not able to recall how she obtained the injury. In the past, Marjory has had bruises of unknown origin on her arms that did not resemble hand prints.

First Visit: The Investigator arrived at Marjory's home and found the front porch to be very cluttered with boxes and what appeared to be old car parts. The Investigator also noticed a pile of empty beer cans next to a chair on the porch. The Investigator knocked on the door several times before Lenny answered the door. Lenny was very impolite and appeared to be under the influence. He asked the Investigator, "Who the hell are you and what do you want?" After the Investigator identified himself and showed his identification, Lenny became more aggravated. He said to the Investigator, "Get the hell off my porch! You guys have been here before and only upset me and I am not letting you in my house!" Lenny then violently shut the door on the Investigator.

What steps should the Investigator take in this situation?

Due to the nature of the allegations that Marjory has severe cognitive deficits and the concern of physical abuse, the investigator should contact the police to assist with gaining access to the home and Marjory at that time. If even with police assistance access is not granted, a letter should be sent to announce the next visit attempt. This letter should include that if access is again not granted, that a court order for access will be requested.

An OAPS nurse should be brought on the visit so that Marjory can be assessed for any injury. While preparing for the next visit attempt, contacts should be made with her doctor's office to determine if there have been any concerns from the doctor. Contacts should also be attempted with any family members or existing service providers.

If during the visit, concerns are found then actions should be taken to remove Marjory from this situation. Attempts should be made to find any other responsible family members to take over the situation. If no alternatives are available and the risk cannot be reduced or eliminated while Marjory remains in that environment, a guardianship may need to be initiated.

8. Describe the challenges you anticipate encountering as a Protective Services provider. How do you plan to mitigate those challenges?

The number of reports in Allegheny County are increasing. This requires a strong team of investigators and supervisors to work together efficiently. Through this proposal, EAAS plans to add the position of case aide who can assist with the SAMS documentation and other necessary correspondence. This will provide support to the investigative team and will improve timeliness of documentation.

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Emergency placement response requires working relationships with local providers. EAAS has developed a successful relationship with a personal care home in the Zone 2 area. If awarded a different area, EAAS will immediately begin outreach and relationship building for additional emergency placement options.

Older adults do not always access and benefit from resources identified in the service plan. One reason for this is that these adults can have difficulty accepting help and changing behaviors to benefit from resources. EAAS will be training its investigative team in motivational interviewing with the purpose of assisting staff in helping older adults prepare for change. This training is more fully discussed in question nine. To further assist older adults involved with the judicial system, EAAS will continue to work with the Allegheny County District Attorney's Senior Justice Advocates through presentations at its senior centers and by referring older adults and their families to this resource. Victim services agencies will also be contacted as appropriate. To further assist older adults in need of mental health services, EAAS will continue to build relationships and awareness of available services.

Maintaining adequate staffing levels can be challenging. EAAS will offer competitive salary and benefit packages in order to attract candidates. EAAS also has a strong focus on the team concept and having team members who are resources to each other and who understand that this job often requires collaboration between investigators. EAAS believes that the team concept is a strong component of its ability to retain investigators.

9. Describe any innovations you will enact, while adhering to the Older Adults Protective Services Act, to increase quality and efficiency of Protective Services delivery and to produce better outcomes for older adults (e.g., use of technology, relationship building, trainings).

EAAS will be participating in a training program with a goal of producing better outcomes for older adults. In July of 2018, EAAS received funding from the Jefferson Regional Foundation to conduct training in motivational interviewing for protective services investigators, supervisors, and other non-profit agency care managers. EAAS will contract with Case Western University, Cleveland, Ohio. Motivational interviewing is an evidence-based tool designed to help people plan for and begin the process of change. This is a useful tool for staff working in protective services, as older adults will need to experience change in living arrangements, social conditions, or accessing resources to address risks of abuse or to resolve abuse. The training will incorporate exercises and examples specific to the practice of protective services with an emphasis on individuals with mental health and/or substance use disorders. Interviewing techniques to enhance trauma informed care will also be discussed.

All investigators will participate in two modules that are each six hours long:

- Foundations of Motivational Interviewing Part 1 introduces the philosophy and constructs of the model along with skill-building exercises utilizing client centered approaches and strategies.

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- Foundations of Motivational Interviewing Part 2 will discuss integrating the model into the protective services work. Participants will learn specific techniques to strengthen a client's commitment to change.

All supervisors will participate in up to six hours of consultation to assist with skill-evaluation, feedback and planning. These sessions will be held via Zoom Video Conferencing.

Additionally through funding from this same grant, EAAS will be conducting targeted outreach and education to attorneys and caregivers on the choice of responsible parties for advanced care planning. The goal of the outreach is to implement a practice to reduce the risk of abuse or exploitation. These activities will occur between January and June 2019.

10. Describe how your organization will assure quality and consistency in delivered Protective Services.

EAAS will assure quality and consistency in delivering services in the following ways:

- Adhere to clients' rights of self-determination, least restrictive alternatives, informed consent, and legal representation.
- Consistently follow the regulations and scopes of service including the specifics to the categories of reports.
- Provide an environment where staff feel supported, with regular oversight to ensure that all investigations are thorough and comprehensive.
- Hold weekly and as needed meetings between the supervisor and each investigator.
- Maintain an office location in each zone of service for daily team consultations and routine supervisor meetings.
- Auditing of files by supervisor.
- Responding to any issues identified in AAA monthly monitoring reviews.
- Employ a trauma informed care approach to protective services casework.
- Join National Adult Protective Services Association to monitor best practices in service provision.

11. Describe your data collection and entry plan.

EAAS is familiar and compliant with the AAA's current processes and follows the guidelines for data entry into SAMS. EAAS has a password protection policy in place for all employees to ensure computer and mobile device security and to minimize the risk of an information breach.

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EAAS will document all protective services casework activities in SAMS thoroughly and in a timely manner. Critical incidents (e.g. interviews with the older adult) will be documented within 24 hours. Other investigative activities will be documented within five (5) business days. A case aide will be hired to assist with data entry to ensure timely and accurate documentation.

12. Describe how your organization will adhere to Protective Services confidentiality requirements.

EAAS will assure that staff with access to information contained, or to be contained, in a case record are fully aware of the confidentiality provisions as outlined in the Older Adult Protective Services Act and regulations, 6 PA Code Chapter 15. All protective service staff will sign the PDA Confidentiality Statement and be made aware of all confidentiality requirements and the penalties for violation of the requirements.

Additionally, all employees of the Agency are expected to comply with the federal Health Insurance Portability and Accountability Act (HIPAA) and with all Agency policies regarding HIPAA. It is incumbent upon every employee to recognize that our clients' right to privacy must be strictly protected. All EAAS employees working with HIPAA protected clients must read and acknowledge their responsibility in keeping that information protected whether verbally, written or in electronic format by signing the receipt of acknowledgement of the EAAS' Employee Handbook upon hire.

Documents containing protected information are secured at all times and protected from sight in office settings. Desktops are not to have protected information visible or unsecured on the desktop if the desk is not occupied. Written information removed from the secure office environment to conduct program/service affiliated work, must be protected by securing the information and keeping it with or in proximity of the employee at all times. All protected information must be returned to the secure office setting once the need for work use to conduct program or service business is complete. All electronic devices are physically secure when not in use; all are password protected and, if need be, are locked in vehicle trunks when transporting.

Only EAAS staff with direct protective services functions are authorized to have access to records. All records are locked in a file cabinet separate from other Agency files. All protective services staff will follow procedures for access to records by an authorized person and will follow the guidelines for disclosure of information as outlined in the Protective Services Act.

RFP Response Form

RFP for Providers for Older Adults Protective Services

Budget (10 points possible)

13. Provide a line item budget for the areas you are proposing to serve. Include allocations for the contingency fund, staff salaries and benefits, travel, training, equipment and administration. You may provide the line item budget in the space below or as an attachment (e.g., Excel file). This question does not count towards page limits.
See attached excel document. This is one document with a sheet for each of the two proposed zones.

14. Provide a budget narrative that explains and justifies the line items in the proposed budget. You may provide the budget narrative in the space below or as an attachment. This question does not count towards page limits.
See attached two word documents—one for each zone.

EASTERN AREA ADULT SERVICES INC
RFP Budget for Protective Services - Zone#1 (if awarded one zone)
Fiscal Year 2019-20

	Zone #1 2019-20 Budget
Protective Services Contract	423,333
PS Contract-Contingency	10,000
TOTAL FUNDING FOR PS PROGRAM	433,333
EXPENSES	
Program Salaries	202,131
Program Director Support	4,552
On-Call Hours	14,883
PT Case Aide	15,600
TOTAL SALARIES AND WAGES	237,166
FICA	18,143
Workers Compensation	22,296
Health Insurance	40,572
Other Benefits	5,660
TOTAL BENEFITS	86,671
Communications	5,747
Contingency	10,000
Contracted Audit & Payroll	7,320
Occupancy	18,840
Computers	4,000
Technology Support	3,043
Office Expense	3,369
Travel-Mileage Reimbursement	11,000
Training	2,800
TOTAL EXPENSE	389,956
ORDINARY INCOME	43,377
ADMIN ALLOCATION	(43,333)
NET INCOME	44

EASTERN AREA ADULT SERVICES INC.
RFP Budget for Protective Services - Zone #2 (if awarded a second zone)
Fiscal Year 2019-20

	Zone #2 2019-20 Budget
Protective Services Contract	423,333
PS Contract-Contingency	10,000
TOTAL FUNDING FOR PS PROGRAM	433,333
EXPENSES	
Program Salaries	195,000
Program Director Support	4,552
Program Supervisor Support	4,693
On-Call Hours	12,023
PT Case Aide	15,600
TOTAL SALARIES AND WAGES	231,868
FICA	17,769
Workers Compensation	21,483
Health Insurance	40,572
Other Benefits	5,660
TOTAL BENEFITS	85,484
Communications	5,747
Contingency	10,000
Contracted Audit & Payroll	7,320
Occupancy	18,240
Computers	10,000
Technology Support	3,043
Office Expense	3,269
Travel-Mileage Reimbursement	11,000
Training	4,000
TOTAL EXPENSE	389,971
ORDINARY INCOME	43,362
ADMIN ALLOCATION	(43,333)
NET INCOME	29

EASTERN AREA ADULT SERVICES - RFP BUDGET NARRATIVE FY 2019-20 - ZONE #1

SALARIES AND WAGES

- Salaries compare to the median range for comparable positions and budget size as outlined in the Bayer Center for Non-Profit Management 2017 Wage and Benefit Survey of Southwestern Pennsylvania Nonprofit Organizations.
- Includes 1 Supervisor and 4 full time investigators.
 - Supervisor Salary \$50,344
 - Investigator #1 \$42,200 (10 yrs. of service)
 - Investigator #2 \$39,188 (08 yrs. Of service)
 - Investigator #3 \$35,200 (01 yr. of service)
 - Investigator #4 \$35,200 (01 yr. of service)
- Also included are on-call and overtime hours, Program Director support, and one Part-time Case Aide to assist in SAMS documentation and program correspondence.

BENEFITS

- PS investigators are considered 942 (Home Health Care Professional) for Workers Compensation. Rates are roughly 10% of salary.
- RFP assumes all PS investigators will elect offered Health Insurance.
- Other Benefits include offered Dental, Vision, Life Insurance and Retirement.

COMMUNICATIONS - Include telephone, internet, cell phone, and postage.

CONTRACTED AUDIT & PAYROLL- are Protective Service's share of EAAS ADP payroll services and the annual audit.

OCCUPANCY

- Consists of Protective Services direct and common space shared rent at Keystone Commons facility, utilities, repairs and maintenance, and commercial and liability insurance. Occupancy costs are determined by PS square footage.

COMPUTERS AND TECHNOLOGY SUPPORT

- Contingent on the contract award, EAAS will purchase additional computers and set-up for 2 investigators.
- Technology support is PS's share of our annual support contract. The share is determined by number of computers.

OFFICE EXPENSE – includes copier, paper, supplies, and minor office equipment.

TRAVEL MILEAGE - pays .545 cents per mile travelled. Current investigators average 300-350 miles per month.

TRAINING – travel, hotel and per diem for 2 new staff for mandatory PA State training; plus local conferences.

EASTERN AREA ADULT SERVICES - RFP BUDGET NARRATIVE FY 2019-20 - ZONE #2

SALARIES AND WAGES

- Salaries compare to the median range for comparable positions and budget size as outlined in the Bayer Center for Non-Profit Management 2017 Wage and Benefit Survey of Southwestern Pennsylvania Nonprofit Organizations.
- Includes 1 Assistant Supervisor and 4 full time investigators.
 - Assistant Supervisor \$45,000 (1-5 yrs. of service)
 - Investigator #1 \$37,500
 - Investigator #2 \$37,500
 - Investigator #3 \$37,500
 - Investigator #4 \$37,500
- All investigators in Region #2 are new hires and individual salaries will vary according to experience.
- Also included are on-call and overtime hours, Program Director support, Supervisor Support, and one Part-time Case Aide to assist in SAMS documentation and program correspondence.

BENEFITS

- PS investigators are considered 942 (Home Health Care Professional) for Workers Compensation. Rates are roughly 10% of salary.
- RFP assumes all PS investigators will elect offered Health Insurance.
- Other Benefits include offered Dental, Vision, Life Insurance and Retirement.

COMMUNICATIONS - Include telephone, internet, cell phone, and postage.

CONTRACTED AUDIT & PAYROLL- are Protective Service's share of EAAS ADP payroll services and the annual audit.

OCCUPANCY - Consists of Protective Services rental of space in Region #2, utilities, repairs and maintenance, and commercial and liability insurance.

COMPUTERS AND TECHNOLOGY SUPPORT

- Contingent on the contract award, EAAS will purchase additional computers and set-up for 4 investigators and 1 Asst. Supervisor.
- Technology support is PS's share of our annual support contract. The share is determined by number of computers.

OFFICE EXPENSE – includes copier, paper, supplies, and minor office equipment.

TRAVEL MILEAGE - pays .545 cents per mile travelled. Current investigators average 300-350 miles per month.

TRAINING – travel, hotel and per diem for 3 new staff for mandatory PA State training; plus local conferences.