



REQUEST FOR PROPOSALS:
Budget Counseling Services

Release Date: January 22, 2018

Due Date: February 9, 2018

Jackson Medical Mall Foundation
Support & Outreach Services
350 W. Woodrow Wilson Ave. Suite 3504
Jackson, MS 39213

Goals, Objectives & Overview

The Jackson Medical Mall Foundation hereby extends an invitation to qualified firms to submit a proposal for the project referred to as **The Jackson Medical Mall Foundation's Jackson MSA Housing Program**.

The Jackson Medical Mall Foundation is seeking qualified organizations interested in providing Budget Counseling Services to participants in the Jackson MSA Housing Program who reside in Copiah, Hinds, Madison, Rankin, and Simpson counties. JMMF is committed to improving the current housing status of individuals and their families through promotion of budget and financial education. Budget Counseling Services play an integral role in assisting individuals to navigate complex systems and specifically, assist individuals with identifying financial barriers, enrolling in needed services, identifying additional resources, and assuring that needed supports are in place to help each person improve their financial stability and thrive in the community.

JMMF is committed to selecting providers that are particularly dedicated to providing high quality, culturally and linguistically competent services that are responsive to the diverse needs of the population. Request for Proposal documents will be available for pick up, e-mail, sent via regular post mail and posted on the JMMF website beginning **January 22, 2018** and may be obtained by contacting Shante' Black, VP of Support & Outreach Services at 601-982-8467 ext. 119 or via email at sblack@jacksonmedicalmall.org or Amber Gray, Project Manager at 601-982-8467 ext. 111 or via email at agray@jacksonmedicalmall.org.

Scope of Services

The main goals of Budget Counseling Services are to improve the current housing status, improve the overall quality of life of all program participants and to promote their long-term stability. In order to achieve all goals, services include, but is not limited to, assessments to determine financial/ budgeting strengths and weaknesses, service needs, linkage to resources; linkage to housing related entitlements/ benefits, development of a budget plan, and assistance in developing financial support systems. As soon as participants are enrolled in services, Budget Counseling providers should be actively working to promote the participants long-term stability.

Budget Counseling Service providers selected through this RFP will provide the following services:

1. Participate in outreach services to reach up to 1,000 people living in Copiah, Hinds, Madison, Rankin, and Simpson counties in an effort to apprise the target population of services provided by the Jackson MSA Housing Program.

2. Facilitate budget/ housing counseling and education services to up to 600 people living in Copiah, Hinds, Madison, Rankin, and Simpson counties.
3. Participate in other meetings as necessary to meet the housing needs of participants.
4. Interface with the Homeless Management Information System (HMIS), for data collection, data retrieval and quality control process.
5. Provide certificates to all participants.
6. Participate in monthly collaborative activities to review and make recommendations that impact participants capacity to manage their financial health.
7. Assist in report writing and editing as necessary for program director to submit accurate and timely reports.

Target Population

All referred clients who meet the medical necessity criteria for entry into the Jackson MSA Housing Program have the option to receive Budget Counseling Services. JMMF also requests that providers give priority to individuals who may be particularly vulnerable to or at risk of adverse outcomes without these services in place.

Staff Requirements

Employing qualified, highly trained staff is a critical component of Budget Counseling Service due to the diverse needs of individuals who are in need of services. Particular emphasis should be given to training staff on obtaining and maintaining financial benefits, cultural and linguistic competence, person-centered planning, strengths-based financial management, and motivational interviewing. Budget Counseling Providers should also provide adequate supervision of staff. All staff must also obtain HIPAA Certifications as well as other trainings that may be beneficial for service delivery.

Program Reporting Outcomes

Selected applicants will be expected to report client data to JMMF and input required data into the HMIS System during the entirety of the approved service term. JMMF will require at least quarterly reporting on key factors that are assessed throughout the participant's tenure with Budget Counseling Services. JMMF will collaborate with the selected provider to develop outcomes and associated data reporting mechanisms. Data points may be qualitative and quantitative in nature including, but not limited to:

- Demographic information
- Linkage to and engagement in needed budget services or counseling.
- Linkage to financial entitlements and other needed resources.

- Financial barriers affecting housing status.
- Engagement in financial activities such as work, education, etc.

The selected providers will be required to develop and implement practices and procedures to support the system outcomes outlined above.

Applicant Eligibility

Applicants must meet all of the criteria below to be considered eligible to become a Budget Counseling Services provider through this RFP:

- Applicants must be a non-profit organization with 5 years of experience as a Budget Counseling Service Provider.
- Applicants must be approved and/or licensed in Mississippi as a Budget Counseling Service provider and license must be in good standing.
- Applicants must be a HUD qualified service agency and familiar with HUD processes and regulations.
- Applicants should have a strong commitment to provide culturally competent, high quality services to eligible participants.
- Applicants must not be listed on the Debarment & Suspension List.

Evaluation & Award Process

The submission of a proposal does not, in any way, guarantee an award. JMMF is not responsible for any cost incurred related to the preparation of a proposal in response to this RFP. JMMF reserves the right to withdraw an award prior to execution of a contract with a selected applicant in JMMF's sole and absolute discretion.

JMMF will select the most qualified and responsive applicant through this RFP process. The awarded applicant will serve as the Budget Counseling Service provider for all Jackson MSA Housing Participants residing in Copiah, Hinds, Madison, Rankin, and Simpson counties. The selected Budget Counseling Service provider will be the only provider permitted to serve the target population. JMMF will enter into a contract with the selected applicant following notification of award. Budget Counseling Services are grant funded. Funding for the program is supplied by the City of Jackson. Selected applicants must comply with all terms and conditions applicable to contracts executed by JMMF and the City of Jackson.

FORMAT AND CONTENT OF THE PROPOSAL

Proposal Instructions

Applicants should submit all required information in the format specified in these instructions by the due date. The proposal narrative should not exceed 15 typed, single-sided, single-spaced pages using Times New Roman 12-point font. The cover letter and attachments do not count toward the page limit.

The final proposal package shall include:

- A proposal cover letter completed, signed, and dated by an authorized representative of the applicant organization. The cover letter must include the full legal name of the applicant organization, address, contact information, and the designated contact person.
- One original and (6) copies of the proposal package, totaling 7 copies, must be submitted no later than **4:00pm, Friday, February 9, 2018**. Incomplete proposals, proposals submitted after the time due, and failure to submit the requested number of copies will not be considered. Oral, telephonic, faxed, or telegraphic proposals will not be accepted.
- The proposal packet must be delivered in a sealed envelope labeled with the applicant's organization name and address; the designated contact person's name, email address and telephone number; and clearly marked "JMMF Budget Counseling Services Proposal" in the lower left corner.
- Proposals may be mailed or hand-delivered. If the proposal is sent by mail or commercial delivery service, the applicant shall be responsible for actual delivery of the proposal to JMMF on or before the deadline. All submitted proposals become the property of JMMF.
- Anticipated Service Term: March 1, 2018 – September 30, 2018.

Proposal Narrative Outline

The proposal should be a clear, concise narrative that describes the applicant's intent to serve the target population.

1. Organizational Background

- a. Describe organization's history and experience providing similar Budget Counseling Services. Submit relevant approval letters or licenses.
- b. Describe your organization's capacity to provide Budget Counseling Services.

2. Description and Goals of the Budget Counseling Services Program

- a. Describe how you plan to implement the Scope of Service and demonstrate how the approach would fulfill JMMF's goals and objectives described in this RFP.
- b. Describe the location of the office where the Budget Counseling program will be housed and the hours of operation.
- c. Describe other related services provided by your organization as well as any relationships your organization has with other provider entities and the structure/process you will use to avoid conflicts of interest and inappropriate self-referrals.

3. Program's Organizational Structure and Staffing Plan

- a. Describe the staffing pattern you will use to deliver the proposed services, including the supervisory roles and educational background and experience of staff to be assigned to this project. Include an organizational chart.
- b. Describe your plan to ensure that qualified staff is available.
- c. Describe your plan to ensure adequate and appropriate supervision of staff.
- d. Describe the training plan for staff.

4. Effectively Serving the Target Population

- a. Describe how the program will give priority to the populations listed in the "Target Population" section of this document, including how the program will use assertive outreach strategies to assist individuals viewed as challenging to engage.
- b. Describe how your organization will ensure that services are delivered in a culturally and linguistically competent manner, responsive to the diverse communities served.
- c. Describe how your organization will assess and work with individuals who have limited English proficiency, including the procedures in place to address service access for these individuals.

5. Program Evaluation and Quality Assurance

- a. Describe the program's anticipated outcomes and how you will track and monitor these outcomes.
- b. Describe the quality assurance process of the organization or program (e.g., client satisfaction surveys, program evaluation, etc.).
- c. Describe the data this program will collect, including how it will be collected, who will be responsible for collecting, analyzing, and storing the data.

6. Implementation Timeline

- a. Provide a timeline to establish and execute Budget Counseling Services.

Fee Schedule/ Budget

Respondents must state your commission rate per person or per session for up to 1,000 people. Include a budget narrative and a breakdown of all fees related to the proposed service delivery.

Additional Requirements

The following information must also accompany your proposal:

- List years in business, previous names of the firm, if any.
- Description of your firm including size of the firm, location, number and nature of professional staff to be assigned to JMMF, personal and/or staff training and experience, including a brief resume for each key person listed.
- Describe experience (minimum five (5) years previous experience with proven effectiveness) your firm has in Budget Counseling Services.
- Experience in assisting similar size entities
- List at least three (3) references where and when your firm provided similar services. Please provide names and telephone numbers of contact persons for each reference.
- Additional services offered through your firm.
- Listing of current litigation, outstanding judgments, and liens.

Notice of Award

It is anticipated that the Notice of Award will be issued no later than Monday, February 19, 2018.

Proposals can be mailed, or hand delivered to:

Jackson Medical Mall Foundation
Support & Outreach Services
Attn: Shante' Black
350 W. Woodrow Wilson Ave., 3rd Floor, Suite 3504
Jackson, MS 39213

Selection Schedule:

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| Deadline for Submittals | Friday, February 9, 2018 by 4:00 pm |
| Proposal Opening/ Review | Tuesday, February 13, 2018 |
| Notice of Awards | Monday, February 19, 2018 |

Rating Criteria

All timely proposals submitted by eligible applicants will be reviewed by the JMMF's Evaluation Committee, which will evaluate and rate such proposals based on the criteria below. Failure to submit required information may result in applicant's proposal being disqualified.

JMMF reserves the right to conduct interviews and/or request that applicants make presentations. Although discussions may be conducted with applicants after proposals have been submitted, JMMF reserves the right to award contracts on the basis of initial proposals received, without discussions; therefore, the applicant's initial proposal should represent its best effort.

1. Organizational Background (10 Points)

- This section should provide evidence of the organization's history and experience providing mental health services.
- It should also clearly show the organization's understanding of any federal or state requirements.

2. Description and Goals of the Budget Counseling Services program (25 Points)

- This description of the program should show a strong commitment to the goals outlined in the "Goals and Objectives" section of this RFP.
- The applicant should demonstrate a strong understanding of the requirements listed in the Scope of Services by providing a detailed implementation plan.
- The location of services should be adequate to store case files, support staffing needs, and promote access to Budget Counseling Services.
- It should be clear that the program will avoid known conflicts of interest/ self-referral and respect consumer choice when connecting consumers to other services.

3. Program's Organizational Structure and Staffing Plan (20 Points)

- The staffing pattern and organizational chart should demonstrate a strong understanding of the regulations that govern staffing of Budget Counseling Services.
- It should be apparent that qualified staff will be available to address the urgent needs of consumers.
- Staff training, and supervision should be adequate to support staff who work with individuals with diverse needs and backgrounds.

4. Effectively Serving the Target Population (25 Points)

- This section should thoroughly explain how the applicant will effectively reach out to engage, serve, and successfully link the target population with many complex needs.
- Emphasis should be given to the partnerships the program either has or will develop for the purpose of generating referrals from systems/ organizations and to make linkages to these systems/ organizations.
- This section should clearly articulate a commitment to service delivery that is culturally and linguistically competent, responsive to the diverse needs of the communities served.
- It should also demonstrate how the program will work with people who have limited English proficiency, both within the Budget Counseling Services program and in connecting consumers to linguistically competent care.

5. Program Evaluation and Quality Assurance (15 Points)

- The applicant should show a commitment to providing quality services by describing how quality will be defined and measured on an ongoing basis.

6. Implementation Timeline (5 Points)

- The timeline should be reasonable and emphasize the transition of existing consumers of providers not selected by this RFP process.