

January 2020 | IPAC Subcommittee Meeting Resources

- Agenda
- Meeting Minutes
- CMS Webinar – Money Follows the Person
- Monthly Public Webinar for CDE Project
- DSHS TBI Continuing Education Specialty Course in 2020
- RFQQ Fuel Switch Deferral
- Tribal MOU Updated
- Spring Summit Save The Date Flyer



AL TSA/DDA/BHA IPAC SUBCOMMITTEE MEETING AGENDA

Administrations and Divisions:

Home & Community Services (HCS), Residential Community Services (RCS), Behavioral Health Administration (BHA),

Developmental Disabilities Administration (DDA), Division of Behavioral Health and Recovery (DBHR), Office of the Deaf & Hard of Hearing (ODHH)

January 14, 2020 from 9 a.m. – noon

In-Person Locations (other locations available upon request: AL TSA Headquarters,
4450 10th Avenue SE, Lacey, WA.

Port Angles CSO

Please register for IPAC Subcommittee AL TSA/BHA/DDA on January 14, 2020 9:00 AM PST at:

<https://attendee.gotowebinar.com/register/7982740694599152141>

After registering, you will receive a confirmation email containing information about joining the webinar.

Welcome and Introductions – Brenda Francis-Thomas

- Welcoming
- Invocation
- Announcements
- Roll Call

Aging and Long-Term Services Administration – Marietta Bobba; Ann Dahl

- Tribal Initiative Updates:
 - Squaxin Island Tribe
 - Lummi Nation
 - Makah Tribe
 - Nisqually Tribe

- CMS Tribal Webinars
- Oklahoma meeting for MFPTI grantees
- APS Check in
- Spring and Fall Summit Schedule
- Electronic Visit and Verification/Consumer Directed Employer Round tables and Consultation
- Tribal Pilot Project (Repair, Refurbish, Weatherization)
- Traumatic Brain Injury Trainings
- Review Matrix

Developmental Disabilities Administration – Justin Chan

- 2019 Community Summit
- DDA clients with tribal affiliation (self-identified) and receiving DDA services
- DDA Employment and Day Services: County Outreach to Tribes
- Follow-up from last meeting
 - Tribal Assisters
 - Work with DVR and Tribal Vocational Habitation Programs
- Webpage Updates
- Background Checks
 - New Hope Act
 - Parent Providers Requirement
- Contracting and [Frequently Asked Questions](#)

This Frequently Asked Questions is for all contracted 1099 providers (Independent Providers). If you are not a 1099 provider, please call your local DDA office and ask for the contracts department.

- [Intake and Eligibility](#) – Complete the required forms and documents. You can request a packet by filling out a [Service and Information Request](#) (<https://www.dshs.wa.gov/dda/service-and-information-request>) or by returning the information listed below:
 - [Request for DDA Eligibility Determination Form \(14-151\)](#)
 - [Consent \(14-012\)](#)
 - [Notice of Privacy Practices for Client Confidential Information \(03-387\)](#)
 - [Washington State Voter Registration](#) for applicants age 18 or older
 - Documents that support that you have a developmental disability, as described in [DSHS Form 14-459 Eligible Conditions Specific to Age and Type of Evidence](#) such as:
 - Educational records
 - Psychological records
 - Medical records

- Review Matrix

Behavioral Health Administration – Zephyr Forest, BHA Tribal Liaison

- Trueblood Updates
- Policy 1.7 Consultation Updates
- Legislative Expectations
- Review Matrix

Closing

Agenda Items for next meeting:

Next meeting is on February 11, 2020 from 9 a.m. to 12 p.m.



AL TSA/DDA/BHA IPAC SUBCOMMITTEE MEETING MINUTES

Administrations and Divisions:

Home & Community Services (HCS), Residential Community Services (RCS), Behavioral Health Administration (BHA),

Developmental Disabilities Administration (DDA), Division of Behavioral Health and Recovery (DBHR), Office of the Deaf & Hard of Hearing (ODHH)

January 14, 2020 from 9 a.m. – noon

In-Person Locations (other locations available upon request: AL TSA Headquarters,
4450 10th Avenue SE, Lacey, WA.

Port Angles CSO

Please register for IPAC Subcommittee AL TSA/BHA/DDA on January 14, 2020 9:00 AM PST at:

<https://attendee.gotowebinar.com/register/7982740694599152141>

After registering, you will receive a confirmation email containing information about joining the webinar.

Welcome and Introductions – Brenda Francis-Thomas

- Welcoming
- Invocation
- Announcements: Liz Mueller has stepped down from Tribal Council and will be stepping down from IPAC. Loni Greninger will become Vice Chair and co-chair for IPAC DDA-AL TSA-BHA subcommittee. A new secretary will also be appointed.
- Kalispel Tribe Tree of Healing Conference will be held on March 24-26. Melissa Hurt-Moran at 509-789-7360 is the contact for more information. (Is this accurate?)
- Roll Call

• Present?	Attendee	Role		Present?	Attendee	Role
X	Ann Dahl	AL TSA Tribal Initiative Project Manager		X	Justin Chan	DDA Co-Chair Statewide Tribal Liaison
X	Brenda Francis-Thomas	DSHS Office of Indian Policy Region 3 North		X	Wendy Thomas	Kalispel Tribe

X	Loni Greninger	Jamestown S'Klallam Tribe		X	Brooke Harris	Dept. of Commerce
X	Nora Flett	Health Coach, Spokane Tribe		X	Geri-Lynn McNeill	DSHS AL TSA
X	Zephyr Forrest	DSHS BHA		X	Marie Natrall	DSHS OIP
X	Marietta Bobba	DSHS AL TSA Tribal Liaison				

Aging and Long-Term Services Administration – Marietta Bobba; Ann Dahl

- **Tribal Initiative Updates:**

- Squaxin Island Tribe –no report. Tribe closed due to inclement weather.
- Lummi Nation – no report. Tribe closed due to inclement weather.
- Makah Tribe - no report. Tribe closed due to inclement weather.
- Nisqually Tribe - no report. Tribe closed due to inclement weather.
- CMS Tribal Webinars – Two MFPTI webinars will be held. The first one will highlight the Makah and Muckleshoot Tribes from Washington and the Wichita Tribe from Oklahoma. It is scheduled for January 22nd. Registration email is attached to the minutes.
- Oklahoma meeting for MFPTI grantees – Oklahoma is awaiting budget approval from CMS to start formal planning but has already reached out to a few tribes about co-hosting.

- **APS Check in.** Jamestown will be working on a MOA in the future. Initial discussion will be at the upcoming APS 7.01 meeting. The Kalispel Tribe has contacted regional APS staff to begin discussion about an APS MOA. It was requested that an existing MOA be shared. AL TSA will share an existing MOA with tribe. There have been a few APS referrals that have worked positively with on-line submission and staff follow-up. It was a positive joint process for a tribal member living in a nursing home.

- **Spring and Fall Summit Schedule:** A Dear Tribal Leader letter will be sent out by the end of the week. The spring meeting is on April 16-17 in Spokane. The fall summit is on September 10-11 at Great Wolf Lodge in Grand Mound. Agendas are different for each summit and developed by volunteer committees. The Summits will continue to work toward the goals and work outlined in the 7.01 plans to:

- Strengthen the ability of state Medicaid programs to respond to the unique needs of tribal communities while acknowledging the relationship between state, federal and tribal governments;
- Design, manage, and provide culturally-attuned long-term services and supports for Native Americans/Alaska Natives in their community;
- Improve seamless access to Medicaid funds and services; and
- Reduce the use of institutional services.

- **Electronic Visit and Verification/Consumer Directed Employer Round tables and Consultation**

AL TSA and DDA will hold roundtables and consultation with the Tribes about the on-going Electronic Visit Verification (EVV) and Consumer Directed Employer (CDE) projects. AL TSA originally discussed both projects through formal consultation in 2018. Informational sessions have

been provided through the Indian Policy Advisory subcommittee (IPAC) meetings, public webinars and at the November 2019 ALTSA-Tribal-AAA Summit.

EVV is a federal requirement from the 21st Century Cures Act, passed by Congress in 2016. See Section 12006 of the 21st Century Cures Act. States are required to have EVV systems in place for personal care services by January 1, 2020. Washington state has received a waiver to delay implementation until January 1, 2021. The new Consumer Directed Employer will implement EVV for Individual Providers.

The Department will implement EVV for personal care services in two separate phases. Phase I will include Home Care Agencies providing Personal Care Services (PCS) and respite services to Medicaid clients. Phase II will include Individual Providers (IPs) providing PCS to Medicaid clients that are self-directing their PCS. This process is anticipated to be complete sometime in 2020.

The passage of Washington Substitute Bill (SSB) 6199 mandated that the Consumer Directed Employer be established to serve as the legal employer for the in-home services Individual Provider (IP) workforce.

The goals of the CDE project are to:

- Transfer the administrative functions and responsibilities of IP management from the Department and Area Agencies on Aging case management staff to the CDE.
- Increase availability of Department and Area Agencies on Aging case management to clients for individual assessment, service planning, plan monitoring and working to maintain their health and wellbeing.
- Maintain all essential qualities of client self-direction including selection, management/ supervision and dismissal of their worker.

Vendor selection, policy development and federal due dates have been adjusted since our last discussion.

Meeting	Date & Time	Location and Webinar Registration URL
Roundtable 1	February 11, 2020 9 a.m. - 10 a.m.	ALTSA Headquarters, 4450 10 th Ave SE, Lacey WA 98506 (Quinault Conference Room) https://attendee.gotowebinar.com/register/7982740694599152141
Roundtable 2	February 27, 2020 1 p.m. - 2 p.m.	ALTSA Headquarters, 4450 10 th Ave SE, Lacey WA 98506 (Cushman Conference Room) https://global.gotomeeting.com/join/321913021
Consultation	March 12, 2020 3 p.m. – 4 p.m.	ALTSA Headquarters, 4450 10 th Ave SE, Lacey WA 98506 (Quinault Conference Room) https://global.gotomeeting.com/join/862110741

- **Tribal Pilot Project (Repair, Refurbish, Weatherization):** Brooke Harris. Two programs available. 2.2 million dollars is available to weatherization agencies, both Tribal and non-tribal. The pilot will study why weatherization numbers are dropping for home repair. The funds will be awarded to agencies that apply to repair homes so they can be weatherized. Ceiling is \$25,000 per house. The RFP is out and due back by January 24th. Please encourage agencies to apply for funding by deadline. The tribal areas not within those jurisdiction areas

should encourage community action agencies they work with to apply for the funds. The 2nd program is specific to tribes. Its \$500,000 for trust land properties and each house can access \$40,000. The tribal entity will be able to contract for the funds, complete the repairs and then refer to the tribal weatherization programs and community action agencies to complete the weatherization portion. It is expected to go out on February 3rd with a technical assistance meeting. Applications will be due in early March with funds available in early April. This set-aside is so smaller tribal entities can do their own repairs if they want. These funds need to support weather efficiency. Both programs can serve trust properties.

- **Traumatic Brain Injury Trainings:** A number of free day-long training are being piloted across the state. The trainings come with CEUs. Both Lummi Nation and the Spokane Tribe will be hosting the class to their staff and tribal members. A listing of all the scheduled trainings was sent to the IPAC subcommittee two weeks ago. It will also be attached to the minutes.
- **Review Matrix** – delayed to another meeting.

Developmental Disabilities Administration – Justin Chan

- 2019 Community Summit
- DDA clients with tribal affiliation (self-identified) and receiving DDA services
- DDA Employment and Day Services: County Outreach to Tribes
- Follow-up from last meeting
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- Psychological records
- Medical records
- Review Matrix

Behavioral Health Administration – Zephyr Forest, BHA Tribal Liaison

- Trueblood Updates
 - BHA seeking meeting with courts – Jason Karpen, Forensic Navigator Program Administrator, 360-725-3529, karpejr@dshs.wa.gov.
 - Forensic Navigators will be contacting treatment providers in phase one regions, Tribal Providers are a Priority; Training and further support will be needed for these employees.
 - Jail Technical Assistance information is available for all jails, with specific training opportunities for jails in phase 1 regions. More information at jailassistance@dshs.wa.gov, and on the [BHA website](#).
- Policy 1.7 Consultation Updates
 - Consultation was held on January 9, 2020.
 - The policy was changed to a procedure that supports 7.01 implementation.
 - The final product agreed upon at the consultation will be sent to Tribes as soon as it is authored as a procedure.
 - The next step will be BHA’s Policy Committee ratifying it, and implementing the procedure across BHA.
 - If there are any changes or issues with the policy, please contact Zephyr Forest, BHA Tribal Liaison, at foreszk@dshs.wa.gov, or at 360-902-7675.
- Legislative Expectations
 - Request legislation: Immunity for answers to competency evaluation assessments.
 - Tribal Liaison position – funded for one position, which had been transferred to HCA as part of the recent realignment.
 - ESH and WSH Operations at full funding – \$39.63 Million. This request is to fund the state hospitals at the same level as 2019.
 - Hospital Safety Initiatives - \$8.934 Million – there are a number of initiatives for safety that we are requesting, including a recruitment center to help with staffing, additional training for staff, including a more comprehensive on-boarding process, and a jail-based consultation team.
 - ESH Ward Psychologists - \$879 Thousand for having a psychologist for each ward.
 - SCC High Acuity Staffing – \$769 Thousand to provide extra staffing for the new high acuity building at SCC

Closing

Agenda Items for next meeting:

ALISA:

Tribal Initiative Updates:

- Squaxin Island Tribe
- Lummi Nation
- Makah Tribe
- Nisqually Tribe

Weatherization Funding

APS Check-in

Next meeting is on February 11, 2020 from 9 a.m. to 12 p.m.

From: [Bobba, Marietta \(DSHS/AL TSA\)](#)
To: [DSHS DL OIP ADB Subcommittee](#); [Puyallup - Russ Hanscom \(Russ.Hanscom@PuyallupTribe-nsn.gov\)](#); [Natrall, Marie \(DSHS/OIP\)](#); [Mary L. Honhongva](#); [Venetta Miller \(vernetta.miller@puyalluptribe-nsn.gov\)](#)
Cc: ["Amy Loudermilk"](#); [Andrew Burdette](#); [Ashley](#); [Barbara Juarez](#); [Brian Myers](#); [Dahl, Ann \(DSHS/AL TSA\)](#); [Dean, Jessie M. \(HCA\)](#); [Delsen Lauderback \(Delsen.Lauderback@elwha.org\)](#); [DSHS OIP Staff](#); [Dungan, Marilyn](#); [Ed Fox Ph. D. \(edfoxphd@icloud.com\)](#); [Egan, Elizabeth \(DSHS/Contact\)](#); [Elizabeth Tail \(etail@cowlitz.org\)](#); [Faye Smith \(fsmith@squaxin.us\)](#); [IndigenousPact](#); [Jennifer Brookes \(jbrookes@sauk-suiattle.com\)](#); [Sherrill, James \(DOHi\)](#); [Potter, Jody](#); [Julie Wilchins \(jwilchins@unitedindians.org\)](#); ["Kate Clark"](#); [Kerstin Powell](#); [Freewolf, Kim \(DOHi\)](#); [Larry Burtness \(Larry.Burtness@quileutenation.org\)](#); [Marissa Morken \(mmorken@squaxin.us\)](#); [Mary Myhre \(mmyhre@spipa.org\)](#); [Woods, Maureen](#); [Merrissa Conklin \(mconklin@sauk-suiattle.com\)](#); [Curley, Sharon](#); [Thomas, Shawn \(DOHi\)](#); [Shivon Brite](#); [Smith, Veronica \(DOHi\)](#); [Lowe, Vicki \(DOHi\)](#)
Subject: CMS webinar -Money Follows the Person -Tribal Initiative - Register today.
Date: Monday, January 13, 2020 1:32:54 PM
Attachments: [image001.png](#)

LTSS Webinars



LTSS webinars take place the fourth Wednesday of every month from 2 p.m. to 3 p.m. eastern time. [Browse past webinars](#) to learn more about many different LTSS topics.

Next Webinar

Next Webinar: Money Follows the Person – Tribal Initiative, Part 1

Wednesday, January 22, 2020

Learning Objectives

For the January LTSS webinar, hear from tribal nations in Washington and Oklahoma on the Money Follows the Person Tribal Initiative (MFP-TI).

Panelists will share an overview of MFP-TI and their efforts to expand the availability of home-and community-based services in tribal communities. Additionally, the panelists will include information about health equity, tribal sovereignty, and the importance of establishing government-to-government relations.

By the end of the webinar, participants will recognize:

describe the goals and purpose of the MFP-TI

discuss the importance of culturally specific services and tribal sovereignty

summarize at least 3 successful strategies and challenges when establishing long-term services and supports in Indian Country

Have questions for our presenters? Let us know before the webinar by emailing ltssinfo@kauffmaninc.com.

Register

2 p.m. Eastern

1 p.m. Central
12 p.m. Mountain
11 a.m. Pacific
11 a.m. Arizona
10 a.m. Alaska
9 a.m. Hawaii

If you have never used the Adobe Connect webinar interface:

[Test your system](#) to make sure you meet the technical requirements.

If needed, [download Flash Player](#).

Marietta Bobba, MBA/ TRIBAL AFFAIRS ADMINISTRATOR/ Aging & Long-Term Support Administration
Governor's Interagency Council on Health Disparities/Program and Grants Development
Washington State Department of Social and Health Services
(O) 360-725-2618; bobbam@dshs.wa.gov

Transforming Lives

From: [Bobba, Marietta \(DSHS/AL TSA\)](#)
To: [DSHS DL OIP ADB Subcommittee](#)
Subject: FW: Monthly Public Webinar for the Consumer Directed Employer Project
Date: Monday, January 13, 2020 10:29:21 AM

This webinar may be of interest. AL TSA will also be sending out a formal letter with the dates for roundtables and consultation in February/March 2020 on CDE.

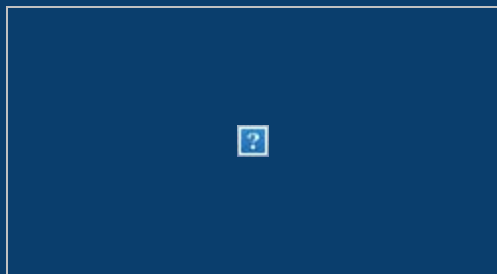
Marietta

Marietta Bobba, MBA/ TRIBAL AFFAIRS ADMINISTRATOR/ Aging & Long-Term Support Administration
Governor's Interagency Council on Health Disparities/Program and Grants Development
Washington State Department of Social and Health Services
(O) 360-725-2618; bobbam@dshs.wa.gov

Transforming Lives

From: Aging and Long Term Support Administration Updates
<AL TSAUpdates@public.govdelivery.com>
Sent: Friday, January 10, 2020 3:29 PM
To: Bobba, Marietta (DSHS/AL TSA) <marietta.bobba@dshs.wa.gov>
Subject: Monthly Public Webinar for the Consumer Directed Employer Project

Having trouble viewing this email? [View it as a Web page.](#)



Aging and Long-Term Support
Administration

January 10, 2020

Monthly Public Webinar for the Consumer Directed Employer project

You are invited to participate in a webinar on the Consumer Directed Employer project. This webinar is intended for members of the public who are interested in learning more about the Consumer Directed Employer project.

- **January 21, 2020 at 10:30am**

[Register online](#)

The Webinar will cover:

- Status updates on project activities
- Upcoming tasks
- IP awareness survey results
- Questions and answers from December webinar

To learn more:

- Visit the [CDE webpage](#).
- Continue to attend our regular webinars.

[Learn More](#)

Connect with DSHS

[Contact Us](#)

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From: [Bobba, Marietta \(DSHS/AL TSA\)](#)
To: [DSHS DL OIP ADB Subcommittee](#); [Adair, Traci](#); [Hoff, Christy Curwick \(DOH\)](#); [Ozmun-Wells, Marianne K. \(DSHS\)](#); [Ossa, Nichole C.](#); [Powell, Theresa \(DSHS/ODJ\)](#); [Terry, Tavares \(DSHS/AL TSA\)](#); [Conner, Kimberly B. \(DSHS/WASILC\)](#); [Bendixen, Becky](#); [Morgan, Kathy \(DSHS/AL TSA/APS\)](#); [Fairfield, Tara S \(DSHS/AL TSA/APS\)](#); [Konsonlas, Sheri \(DSHS/AL TSA/APS\)](#); [Canonica, Anita \(DSHS/AL TSA/APS\)](#)
Subject: NEW DSHS TBI continuing education specialty course in 2020! - Registration and locations
Date: Wednesday, December 18, 2019 2:51:51 PM
Attachments: [image002.png](#)

Hello everyone,

A new Traumatic Brain Injury, Level 1 Capable Caregiving for Brain Injury class has been developed. It is being piloted throughout the state. Specific dates and locations are below with registration links. This is a free class that also provides CEUs. Two tribes are also assisting with the pilot and will have on-site trainings in January and February. If you cannot make one of the classes below or your tribe has a group of employees (social services, elder services, health services, etc.) that would be interested in the training, please let us know. We would be happy to work with you on arranging a training.

Thank you.

Both Angela Regensburg from AL TSA's training unit and David Minor, AL TSA's TBI Council and Fund Coordinator are available to assist.

Angela's contact information is: (O) 360-725-3418 / angela.regensburg@dshs.wa.gov

David's contact information is: (O) 360-764-0792 / david.minor@dshs.wa.gov

Marietta Bobba, MBA/ TRIBAL AFFAIRS ADMINISTRATOR/ Aging & Long-Term Support Administration
Governor's Interagency Council on Health Disparities/Program and Grants Development
Washington State Department of Social and Health Services
(O) 360-725-2618; bobbam@dshs.wa.gov

Transforming Lives

From: Regensburg, Angela L (DSHS/AL TSA/HCS) <angela.regensburg@dshs.wa.gov>
Sent: Wednesday, December 18, 2019 2:37 PM
To: Minor, David P (DSHS/AL TSA/HCS) <david.minor@dshs.wa.gov>
Subject: Updated: Introducing a new DSHS TBI continuing education specialty course in 2020!

Hello

I wanted to connect with you to share some exciting information about **a new Traumatic Brain Injury, Level 1 Capable Caregiving for Brain Injury class**. **Please share this information with anyone within your training business who might be interested in attending and/or becoming a future instructor.**

You might remember when DSHS evaluated recommendations based on stakeholder feedback for Specialty Training improvement and expansion ([Senate Bill 5630](#)). During that stakeholder work, a few expanded topics of specialty were identified. One of those expanded topics was Traumatic Brain Injury. The curriculum development has been a process of working with stakeholders, subject matter experts and conducting extensive research in best practices and developing the curriculum package and we are currently wrapping up pilot testing.

We are excited to open up classes and encourage attendance and active participation of these free classes in January and February 2020. We are interested in participation from any of our contracted community instructors who wish to apply to teach this course. (See the FAQ below for information about becoming an instructor). We are also interested in participation from assisted living facility administrators, ESF administrators, AFH providers, resident managers, long-term-care workers who have a diverse range of knowledge and experience with traumatic brain injury.

- The next series of classes are currently scheduled in January and February 2020 across the state (see schedule below)
- The course is 8-hours in length, including testing time

- 8-hours of continuing education credits and certificate is provided to those who successfully pass the exam
- These scheduled limited classes are offered at no charge
- This new course will be considered an optional course and not required for licensing
- See our FAQ below for more information

This limited free class offering has limited space available, so I do request that interested individuals **register using our online registration system and keep your registration updated – links are available for each individual class listed in the schedule below.** Additional classes may be scheduled in the future by approved community instructors for a fee.

To get this communication out to you early enough so you may plan – a few of the dates are still pending location details, however the city will remain the same if you sign up for these locations – updated information will be available as soon as possible in the registration system.

Have a wonderful day!

Angie Regensburg

Aging and Long-Term Support Administration
Washington State Department of Social and Health Services

Transforming Lives

Schedule of Classes

January 2020

<p>Tuesday, January 7 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnjik</p> <p>-</p> <p>Seattle HCS Office 1737 Airport Way S. Seattle, WA 98134 Seattle, WA</p>	<p>Wednesday, January 15 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnvy</p> <p>-</p> <p>Marriott Courtyard Spokane Downtown 401 N Riverpoint Blvd Spokane, WA</p>
<p>Thursday, January 16 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdncz</p> <p>-</p> <p>Pullman Regional Hospital Conference Room C 835 SE Bishop Blvd Pullman, WA</p>	<p>Thursday, January 23 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnch</p> <p>-</p> <p>Training Location Pending Bellingham, WA</p>
<p>Tuesday, January 28 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnsv</p> <p>-</p> <p>Vancouver Labor and Industries 312 SE Stonemill Dr Suite 120 Vancouver, WA</p>	<p>Thursday, January 30 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnbg</p> <p>-</p> <p>Tacoma DSHS HCS Office Room 305 (3rd floor Children’s Administration) 1949 State Street Tacoma, WA</p>

February 2020

<p>Tuesday, February 4 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdndb</p> <p>-</p> <p>Labor & Industries Headquarters 7273 Linderson Way SW Tumwater, WA</p>	<p>Tuesday, February 11 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdndz</p> <p>-</p> <p>Columbia Basin College 2600 N 20th Avenue Pasco, WA</p>
<p>Thursday, February 13 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdndh</p> <p>-</p> <p>Hilton Garden Inn Wenatchee 25 N Worthen Street Wenatchee, WA</p>	<p>Thursday, February 20 9:00 AM –5:00 PM Register Link: https://www.123signup.com/register?id=rdnyv</p> <p>-</p> <p>Alderwood HCS Mt Olympus North and South 20311 52nd Ave W Lynnwood, WA</p>

Traumatic Brain Injury, Level 1 Capable Caregiving for Brain Injury



Introducing: A **NEW** Department of Social & Health Services continuing education specialty course designed to provide education and best practices for the interaction and care of individuals experiencing a brain injury.

We depend on our brain for a large part of our daily function and an injury to the brain can alter our abilities for the short term and long term. Injuries can affect any age group, culture and race in any geographical region, without warning. Brain injury planning, coordination and service delivery must address broad needs across the life span. Every year, millions of people in the United States suffer brain injuries. **This optional CE expanded specialty course covers:**

Anatomy of the Brain and Brain Injury Basics

Brain Injury Management

Behavior, Mood and Cognition Intervention and Resolution

Communication

Self-Care

Frequently Asked Questions:

Q: When will the TBI, Level 1 curriculum be available?

A: The TBI, Level 1 curriculum (Learners and Instructor guides) will be available in English to approved instructors January, 2020.

Q: Who should take this class?

A: Individuals who may provide care for individuals with a brain injury or individuals who would benefit from more information on caring for individuals with a brain injury.

Q: Where did this curriculum come from?

A: This curriculum was developed from feedback and input across Washington state as part of legislation around Senate Bill 5630. Primary stakeholder and subject matter expert groups included adult family home and assisted living facility owners/providers, managers, supervisors, caregivers, trainers, families, clients/residents, DSHS staff, long-term care ombudsman and advocacy group representatives and piloting with two tribes to gain feedback.

Q: How do I find a class?

A: *Coming soon:* Visit the DSHS website and look at class finder.

Q: How do I become an approved instructor?

A: Instructor qualifications are currently pending WAC stakeholder work and in draft form. If you meet the instructor qualifications: (1) complete the TBI, Level 1 class by an approved instructor. (2) complete an approved Adult Education course if you have not yet completed one. (3) Complete the instructor approval process.

Q: Is this training required?

A: No, this training is NOT required and will be offered as a specialty training.

Q: Other specialty trainings are required, why is this training optional?

A: We recognize that other specialty trainings are required; however, we are expanding our specialty training topics to provide more learning opportunities and professional development opportunities without increasing barriers and requirements for the caregiving community.

Q: Does this training affect licensing requirements?

A: No. This training is optional and not required for a provider to serve the TBI population.

Q: Can I get CE for attending this class?

A: Yes. DSHS offers eight CE credits for completing this course and successful completion of the exam.

Q: Is this a replacement for the “TBI Strategies for Surviving and Thriving” DSHS curriculum?

A: No. This is a brand new curriculum to be added to specialty training.

Q: Does this course meet the requirements for population specific training and HCA Basic Training?

A: Yes. The TBI, Level 1 course is acceptable for credit toward population specific training and HCA Basic Training. No credit hours will be applied toward CE when using this course in this scenario.

Q: Can a training program submit its own curriculum for approval?

A: Yes. Curricula developed and approved as TBI specialty training must include all of the knowledge, skills, topics, competencies and learning objectives of this course. Contact the department for the outline of requirements.

ANGELA REGENSBURG, MAEd / PROGRAM MANAGER / Training Unit Specialty Curriculum & QA

Aging and Long-Term Support Administration

Washington State Department of Social and Health Services

(O) 360-725-3418 / angela.regensburg@dshs.wa.gov

Transforming Lives



Department of Commerce

STATE OF WASHINGTON
DEPARTMENT OF COMMERCE
OLYMPIA, WASHINGTON

REQUEST FOR QUALIFICATIONS AND QUOTATIONS RFQQ NO. 2019HIP-001

***NOTE:** If you download this RFQQ from the Department of Commerce website, you are responsible for sending your name, address, e-mail address, and telephone number to the RFQQ Coordinator in order for your organization to receive any RFQQ amendments or bidder questions/agency answers.*

PROJECT TITLE: Weatherization Deferral and Fuel Switching Pilots

RESPONSE DUE DATE: Friday, January 24, 2020

EXPECTED TIME PERIOD FOR CONTRACT: February 17, 2020 – June 30, 2021

CONSULTANT ELIGIBILITY: This procurement is open to those consultants which satisfy the minimum qualifications stated herein and that are available for work in Washington State.

CONTENTS OF THE REQUEST FOR QUALIFICATIONS AND QUOTATIONS:

1. Introduction
2. General Information for Consultants
3. Response Contents
4. Evaluation and Award
5. Exhibits
 - A. Certifications and Assurances
 - B. Workers' Rights Certification
 - C. Weatherization – Pilot Guidelines
 - D. Proposed Project List (Excel Workbook)



TABLE OF CONTENTS

- 1. Introduction2**
 - 1.1 Purpose and Background.....3
 - 1.2 Objective3
 - 1.3 Minimum Qualifications3
 - 1.4 Funding3
 - 1.5 Period of Performance3
 - 1.6 Definitions.....3
 - 1.7 ADA4

- 2. General Information for Consultants5**
 - 2.1 RFQQ Coordinator5
 - 2.2 Estimated Schedule of Procurement Activities5
 - 2.3 Submission of Responses.....6
 - 2.4 Proprietary Information/Public Disclosure6
 - 2.5 Revisions to the RFQQ7
 - 2.6 Acceptance Period7
 - 2.7 Complaints7
 - 2.8 Responsiveness7
 - 2.9 Most Favorable Terms7
 - 2.10 Contract and General Terms & Conditions8
 - 2.11 Costs to Propose.....8
 - 2.12 No Obligation to Contract.....8
 - 2.13 Rejection of Responses8
 - 2.14 Commitment of Funds.....8
 - 2.15 Insurance Coverage.....8

- 3. Response Contents11**
 - 3.1 Letter of Submittal11
 - 3.2 Qualifications Section.....11
 - 3.2.1 Business Information.....11
 - 3.2.2 Qualifications.....12
 - 3.3 Quotations Section.....13
 - 3.3.1 Identification of Costs.....13
 - 3.3.2 Evaluation13

- 4. Evaluation and Contract Award14**
 - 4.1 Evaluation Procedure14
 - 4.2 Clarification of Response.....14
 - 4.3 Evaluation Weighting and Scoring14
 - 4.4 Notification to Proposers15
 - 4.5 Debriefing of Unsuccessful Proposers15
 - 4.6 Protest Procedure15

- 5. RFQQ Exhibits...17**
 - Exhibit A Certifications and Assurances
 - Exhibit B Workers’ Rights Certification
 - Exhibit C Weatherization – Pilot Guidelines
 - Exhibit D Proposed Project List (Excel Workbook)

1 INTRODUCTION

1.1 PURPOSE AND BACKGROUND

The Washington State Department of Commerce hereafter called "COMMERCE," is initiating this Request for Qualifications and Quotations (RFQQ) to solicit proposals from current WA Low-Income weatherization grantees interested in participating in pilots pertaining to deferred low-income weatherization projects and low-income fuel-switching projects in current WA territories served by the State's Low-Income weatherization program.

The State of Washington, through the Washington State Department of Commerce (COM), Housing Improvements and Preservation (HIP) Unit, intends to use the results of this Request for Qualifications and Quotations (RFQQ) to select qualified grantees to administer these pilots in their current service territories. Grantees will be selected through the process dictated by state and federal laws and procurement practices, and must be a current grantee of the WA State Low-Income Weatherization program. The purposes of these pilots are to:

Deferral Pilot

- Complete weatherization projects currently in deferral or postponed status due to structural, mechanical, and other physical conditions that cannot be addressed otherwise.
- Develop best practices for tracking deferrals
- Develop understanding of current deferral climate in WA State related to the type and cost of repair(s) required to complete weatherization projects.
- Use outcomes to revise Washington State weatherization policies and procedures to promote consistent and cost-effective approaches to addressing deferrals.

Fuel-Switching Pilot

- Reduce high energy burden of clients receiving LIHEAP energy assistance.
- Develop understanding of costs and scope of work throughout Washington State associated with replacing existing propane and oil heating systems with high efficiency electric heating systems.
- Use outcomes to revise Washington State weatherization policies and procedures pertaining to fuel-switching
- Whenever possible, complete weatherization projects in conjunction with the fuel-switch.

During the estimated contract period (February 17th, 2020 - June 30, 2021), approximately \$ 2.2 million will be available for the Deferral pilot and \$2 million will be available for the Fuel-switching pilot.

Funding for these pilots will be allocated to successful bidders based on total costs as proposed using the attached spreadsheet (Exhibit D). Applicants may apply for either pilot, or both. The maximum

EXHIBIT C
Weatherization – Pilot Guidelines

amount granted to each applicant may not exceed \$200,000 for each pilot. Cost caps per project using these funds are \$25,000 for deferral projects and \$20,000 for fuel-switching projects. Each project may receive either deferral or fuel-switch pilot funding, but not both. Refer to Guidelines (Exhibit C) and table below as a reference when submitting your application.

Pilot	Matchmaker Funds	Maximum per Applicant	Maximum per Project
Deferral	\$2.2 million	\$200,000	\$25,000
Fuel-Switching	\$2 million	\$200,000	\$20,000

1.2 OBJECTIVES AND SCOPE OF WORK

COMMERCE is soliciting Applications from provider(s) of weatherization services to low-income households in Washington to provide pilot program services. Said services will be performed in accordance with the regulations set forth by the Uniform Administrative Guidance as outlined in 2 CFR 200, and in accordance with the provisions and procedures contained in the Washington State Weatherization Policy and Procedures Manual and the Standard Work Specifications (SWS), and the attached Exhibit C Weatherization – Pilot Guidelines.

COMMERCE intends to select a qualified providers to enter into an initial grant agreement for the contract period. The contract period for the chosen qualified provider(s) will be from February 17, 2020 to June 30, 2021.

The funding for these pilot programs is provided by Matchmaker funds. The Matchmaker Program increases resources for low-income home weatherization by leveraging local matching dollars and resources from utilities, rental owners and other sources. Washington communities receive funds when they provide a dollar-for-dollar match. The Legislature created the program in 1987 and has authorized the use of state capital funds each biennium since 1991. Grant agreements signed by grantees will reflect actual funding and scope of work. COMMERCE reserves the right to further negotiate the terms and conditions of the grant with the selected provider(s).

The provision of the pilot programs includes all aspects of managing and implementing the fuel switching pilot, the deferral pilot, or both. The selected grantees shall be responsible for all pilot program guidelines requirements and any applicable Weatherization requirements including, but not limited to: client intake and eligibility determinations, determining the weatherization and health and safety needs of each unit, conducting valid energy audits, installation of weatherization measures, conducting quality control final inspections, and fulfilling all necessary reporting requirements.

Deferred Pilot Scope of Work:

1. Complete the projects as you proposed in Exhibit D as available, or identify and complete additional projects to expend full award
 - a. Perform repairs to enable Weatherization
 - b. Perform Weatherization (minimum of two Major Measures required) with regular Weatherization funding
2. Report projects when completed, including back-up documentation to account for costs.
3. Participate in debrief upon pilot completion

Fuel-Switching Pilot Scope of Work:

1. Complete the projects as you proposed in Exhibit D as available, or identify and complete additional projects to expend full award
 - a. Perform fuel-switch
 - b. Since weatherization projects are preferred, perform Weatherization (minimum of two Major Measures) with regular Weatherization funding, whenever possible
2. Report projects when completed, including back-up documentation to account for costs
3. Upon Commerce request, participate in debrief upon pilot completion

COMMERCE may award one or more contracts to consultants who submit Responses as a result of this RFQQ.

1.3 MINIMUM QUALIFICATIONS

The Consultant must be licensed to do business in the state of Washington and be a current grantee of the WA State Low-Income Weatherization Program.

Bidders who do not meet these minimum qualifications will be rejected as non-responsive and will not receive further consideration. Any Response that is rejected as non-responsive will not be evaluated or scored.

1.4 FUNDING

Responses in excess of \$200,000 per pilot will be rejected as non-responsive and will not be evaluated. In the event additional funding becomes available, any contract awarded may be renegotiated to provide for additional related services.

Any contract(s) awarded as a result of this procurement is contingent upon the availability of funding.

1.5 PERIOD OF PERFORMANCE

The period of performance of any contract(s) resulting from this RFQQ is tentatively scheduled to begin on or about **February 17, 2020** and to end on **June 30, 2021**. COMMERCE reserves the option at its sole discretion to extend the contract for two additional one-year periods.

1.6 DEFINITIONS

Definitions for the purposes of this RFQQ include:

Apparently Successful Bidder (ASB). The Consultant(s) selected to enter into negotiations leading to a fully executed contract for the work described in this procurement document.

COMMERCE. The Department of Commerce is the agency of the state of Washington that is issuing this RFQQ.

Consultant. Individual, company, or firm submitting a Response in order to attain a contract with COMMERCE.

Contractor. Individual or company whose Response has been accepted by COMMERCE and is awarded a fully executed, written contract.

Request for Qualifications and Quotations (RFQQ). Formal procurement document in which needed services are identified and firms are invited to submit their qualifications via a written Response to provide the services and their hourly rates; this procurement document.

Response. A formal offer submitted in response to this solicitation.

1.7 ADA

COMMERCE complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFQQ Coordinator to receive this Request for Qualifications and Quotations in Braille or on tape.

2 GENERAL INFORMATION FOR CONSULTANTS

2.1 RFQQ COORDINATOR

The RFQQ Coordinator is the sole point of contact in COMMERCE for this procurement. All communication between the Consultant and COMMERCE upon receipt of this RFQQ shall be with the RFQQ Coordinator, as follows:

Name	Seth Kolodziejski
Mailing Address	
E-Mail Address	Wxquestions@commerce.wa.gov

Any other communication will be considered unofficial and non-binding on COMMERCE. Consultants are to rely on written statements issued by the RFQQ Coordinator. *Communication directed to parties other than the RFQQ Coordinator may result in disqualification of the Consultant.*

2.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Qualifications and Quotations	December 10, 2019
Question & answer period	December 10-17, 2019
Answers issued no later than	December 20, 2019
Responses due	January 24, 2020
Evaluate responses	January 27-31, 2020
Announce “Apparent Successful Bidder” and send notification via e-mail to unsuccessful proposers	February 7, 2020
Hold debriefing conferences (if requested)	As needed
Negotiate contract	February 10-14, 2020
Begin contract work	February 17, 2020

COMMERCE reserves the right to revise the above schedule.

2.3 SUBMISSION OF RESPONSES

HARD COPY RESPONSES:

Hard copy proposals will not be accepted

ELECTRONIC RESPONSES:

The Response must be **received by the RFQQ Coordinator** no later than 5 p.m., Pacific Standard Time, in Olympia, Washington, on **January 24, 2020**.

Responses must be submitted electronically as an attachment to an e-mail to the RFQQ Coordinator, at the e-mail address listed in Section 2.1. Attachments to e-mail shall be in Microsoft Word format or PDF. Zipped files **cannot** be received by COMMERCE and cannot be used for submission of

EXHIBIT C

Weatherization – Pilot Guidelines

Responses. The cover submittal letter and the Certifications and Assurances form must have a scanned signature of the individual within the organization authorized to bind the Consultant to the offer. COMMERCE does not assume responsibility for problems with Consultant's e-mail. If COMMERCE email is not working, appropriate allowances will be made.

Responses may not be transmitted using facsimile transmission.

Consultants should allow sufficient time to ensure timely receipt of the Response by the RFQQ Coordinator. Late Responses will not be accepted and will be automatically disqualified from further consideration, unless COMMERCE e-mail is found to be at fault. All Responses and any accompanying documentation become the property of COMMERCE and will not be returned.

2.4 PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Responses submitted in response to this competitive procurement shall become the property of COMMERCE. All Responses received shall remain confidential until the Apparent Successful Bidder is announced; thereafter, the Responses shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW).

Any information in the Response that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other state or federal law that provides for the nondisclosure of your document, must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the Consultant is making the claim must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words "Proprietary Information" printed on the lower right hand corner of the page. Marking the entire Response exempt from disclosure or as Proprietary Information will not be honored.

If a public records request is made for the information that the Consultant has marked as "Proprietary Information" COMMERCE will notify the Consultant of the request and of the date that the records will be released to the requester unless the Consultant obtains a court order enjoining that disclosure. If the Consultant fails to obtain the court order enjoining disclosure, COMMERCE will release the requested information on the date specified. If a Consultant obtains a court order from a court of competent jurisdiction enjoining disclosure pursuant to Chapter 42.56 RCW, or other state or federal law that provides for nondisclosure, COMMERCE shall maintain the confidentiality of the Consultant's information per the court order.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFQQ Coordinator is required. All requests for information should be directed to the RFQQ Coordinator.

2.5 REVISIONS TO THE RFQQ

In the event it becomes necessary to revise any part of this RFQQ, addenda will be provided via e-mail to all individuals who have made the RFQQ Coordinator aware of their interest. Addenda will also be published on Washington's Electronic Bid System (WEBS). The website can be located at <https://fortress.wa.gov/ga/webs/>. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFQQ and will be placed on the website.

If you downloaded this RFQQ from the Agency website located at www.commerce.wa.gov, you are responsible for sending your name, e-mail address, and telephone number to the RFQQ Coordinator in order for your organization to receive any RFQQ addenda.

COMMERCE also reserves the right to cancel or to reissue the RFQQ in whole or in part, prior to execution of a contract.

2.6 ACCEPTANCE PERIOD

Responses must provide 60 days for acceptance by COMMERCE from the due date for receipt of Responses.

2.7 COMPLAINT PROCESS

Vendors may submit a complaint to COMMERCE based on any of following:

- a) The solicitation unnecessarily restricts competition;
- b) The solicitation evaluation or scoring process is unfair; or
- c) The solicitation requirements are inadequate or insufficient to prepare a Response.

A complaint may be submitted to COMMERCE at any time prior to 5 days before the bid response deadline. The complaint must meet the following requirements:

- a) The complaint must be in writing;
- b) The complaint must be sent to the RFQQ coordinator in a timely manner;
- c) The complaint should clearly articulate the basis for the complaint; and
- d) The complaint should include a proposed remedy.

The RFQQ coordinator will respond to the complaint in writing. The response to the complaint and any changes to the solicitation will be posted on WEBS. The Director of COMMERCE will be notified of all complaints and will be provided a copy of COMMERCE'S response. The complaint may not be raised again during the protest period. COMMERCE'S action or inaction in response to the complaint will be final. There is no appeal process.

2.8 RESPONSIVENESS

All Responses will be reviewed by the RFQQ Coordinator to determine compliance with administrative requirements and instructions specified in this RFQQ. The Consultant is specifically notified that failure to comply with any part of the RFQQ may result in rejection of the Response as non-responsive.

COMMERCE reserves the right, at its sole discretion, to waive minor administrative irregularities.

2.9 MOST FAVORABLE TERMS

COMMERCE reserves the right to make an award without further discussion of the Response submitted. Therefore, the Response should be submitted initially on the most favorable terms which the Consultant can propose. COMMERCE does reserve the right to contact a Consultant for clarification of its Response.

The Consultant should be prepared to accept this RFQQ for incorporation into a contract resulting from this RFQQ. Contract negotiations may incorporate some, or all, of the Consultant's Response. It is understood that the Response will become a part of the official procurement file on this matter without obligation to COMMERCE.

2.10 CONTRACT AND GENERAL TERMS & CONDITIONS

The apparent successful bidder will be expected to enter into a contract which is substantially the same as the Matchmakers Weatherization contract and its general terms and conditions. In no event is a Consultant to submit its own standard contract terms and conditions in response to this solicitation. The Consultant may submit exceptions as allowed in the Certifications and Assurances section, Exhibit A to this solicitation. COMMERCE will review requested exceptions and accept or reject the same at its sole discretion.

EXHIBIT C
Weatherization – Pilot Guidelines

It is anticipated the first deliverable under the contract will be a scoping plan, which will define the specific services to be provided by the CONTRACTOR based upon agreement between COMMERCE and the CONTRACTOR.

2.11 COSTS TO PROPOSE

COMMERCE will not be liable for any costs incurred by the Consultant in preparation of a Response submitted in response to this RFQQ, in conduct of a presentation, or any other activities related to responding to this RFQQ.

2.12 NO OBLIGATION TO CONTRACT

This RFQQ does not obligate the state of Washington or COMMERCE to contract for services specified herein.

2.13 REJECTION OF RESPONSES

COMMERCE reserves the right at its sole discretion to reject any and all Responses received without penalty and not to issue a contract as a result of this RFQQ.

2.14 COMMITMENT OF FUNDS

The Director of COMMERCE or the Director's delegate are the only individuals who may legally commit COMMERCE to the expenditures of funds for a contract resulting from this RFQQ. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.15 INSURANCE COVERAGE

COMMERCE will use local agency insurance certificates on file to fulfill requirements.

3 RESPONSE CONTENTS

ELECTRONIC RESPONSES:

Responses must be written in English and submitted electronically to the RFQQ Coordinator in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A)
2. Qualifications
3. Quotation (Completed attached spreadsheet (Exhibit D))
4. Workers' Rights Certification (Exhibit B)

Responses must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the Response, but should assist the Consultant in preparing a thorough response.

Items in this section marked "mandatory" must be included as part of the Response for the Response to be considered responsive, however, these items are not scored. Items marked "scored" are those that are awarded points as part of the evaluation conducted by the evaluation team.

3.1 LETTER OF SUBMITTAL (MANDATORY)

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit A) must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the Consultant and any proposed subcontractors:

1. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.)
3. Legal status of the Consultant (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number, or Social Security number, **and** the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue. If the Consultant does not have a UBI number, the Consultant must submit a statement that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
5. Location of the facility from which the Consultant would operate.
6. Identify any state employees or former state employees employed or on the firm's governing board as of the date of the Response. Include their position and responsibilities within the Consultant's organization. If following a review of this information, it is determined by COMMERCE that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.

3.2 QUALIFICATIONS SECTION

The services to be provided under this project are: ***(Describe the work to be completed here)***.

EXHIBIT C
Weatherization – Pilot Guidelines

The qualifications section of the Response must contain information that will demonstrate to the evaluation committee the Consultant's understanding of the types of services proposed, the firm's ability to accomplish them, and the ability to meet tight timeframes.

The qualifications response is to be submitted in three sections as follows: 1) Business Information, 2) Experience and Staffing, and 3) Schedule. The optional fourth section would include proof of certification for minority and women-owned businesses participating on the project.

3.2.1 BUSINESS INFORMATION (MANDATORY)

1. State the name of the company, address, phone number, fax number, e-mail address, legal status of entity (ownership) and year entity was established as it now substantially exists.
2. Provide the firm's Federal Employer Tax Identification number or Social Security number and the Washington Uniform Business Identification (UBI) number issued by the state of Washington Department of Revenue.
3. Indicate how many employees are with the firm. Name the firm principles and their roles.
4. Identify any state employees or former state employees employed by the Consultant or on the Consultant's governing board as of the date of the Response. Include their position and responsibilities within the Consultant's organization. If following a review of this information, it is determined by COMMERCE that a conflict of interest exists, the Consultant may be disqualified from further consideration for the award of a contract.
5. If the Consultant's staff or subcontractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington State employee, identify the individual by name, the agency previously or currently employed by, job title or position held, and separation date.
6. If the Consultant has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Consultant's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
7. Submit full details of the terms for default, including the other party's name, address, and phone number. Present the Consultant's position on the matter. COMMERCE will evaluate the facts and may, at its sole discretion, reject the Response on the grounds of the past experience. If no such termination for default has been experienced by the Consultant in the past five years, so indicate.

3.2.2 QUALIFICATIONS

1. EXPERIENCE (SCORED)

- A. Describe services provided by the Consultant that indicate the firm's ability to provide the services described in this RFQQ.
- B. Describe the firm's recent experience with either running a crew, hiring sub-contractors, or both, to perform the work required of the pilot(s) for which you are applying.
- C. Describe additional trainings, certifications, or qualifications for consideration.

2. STAFFING (SCORED)

- A. Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors.

EXHIBIT C
Weatherization – Pilot Guidelines

- B. Provide the name and experience of the person who will be the lead contact for the project.
- C. List any sub-consultants you may want to include to complete your roster of services. Describe what services each would provide. Provide the information in Section 3.2.1 about each.

3. SCHEDULE (SCORED)

Describe the firm's ability to meet deadlines, especially on a short timeframe, and give examples of how past tight deadlines have been successfully met.

3.3 QUOTATIONS SECTION

3.3.1 IDENTIFICATION OF COSTS (SCORED)

The Quotations section must list all hourly rates for services anticipated under the proposed contract. The hourly rates are to represent fully weighted costs. This includes the hourly rates of staff that would be assigned to the project, administrative costs, local travel costs, or any other applicable fees that would be charged under this contract (e.g. prevailing wage).

Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Washington State Office of Minority and Women's Business Enterprises.

Consultants are required to collect and pay Washington State taxes as applicable.

Submit proposed projects and estimated associated project costs by filling out Exhibit D.

The evaluation process is designed to award this procurement not necessarily to the Consultant of least cost, but rather to the Consultant whose Response best meets the requirements of this RFQQ. Consultants are encouraged, however, to submit Responses which are consistent with state government efforts to conserve state resources.

3.3.2 Evaluation

The score for the cost Response will reflect the thoroughness and cost estimate detail provided.

4 EVALUATION AND CONTRACT AWARD

4.1 EVALUATION PROCEDURE

Responsive Responses will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of Responses shall be accomplished by an evaluation team to be designated by COMMERCE, which will determine the ranking of the Responses.

COMMERCE, at its sole discretion, may select the top-scoring firms as finalists to submit additional qualification information, as necessary.

4.2 CLARIFICATION OF RESPONSE

The RFQQ Coordinator may contact the Consultant for clarification of any portion of the Consultant's Response.

4.3 EVALUATION AND SCORING

The following weighting and points will be assigned to the Response for evaluation purposes:

Qualifications Section – 60%	60 points
Firm Experience.....15 points (maximum)	
Staff Qualifications.....35 points (maximum)	
Schedule.....10 points (maximum)	
Quotation Section – 40%	<u>40 points</u>
Identification of Costs.....15 points (maximum)	
Project List (Exhibit D)25 points (maximum for each pilot)	
Grand Total	<u>100 Points</u>

4.4 NOTIFICATION TO PROPOSERS

Firms whose Responses have not been selected for further negotiation or award will be notified by e-mail.

4.5 DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, a debriefing conference will be scheduled with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFQQ Coordinator within three (3) business days after the Notification of Unsuccessful Consultant notice is emailed to the Consultant. The debriefing must be scheduled within three (3) business days of the request.

Discussion will be limited to a critique of the requesting Consultant's Response. *Comparisons between Responses or evaluations of the other Responses will not be allowed.* Debriefing conferences may be conducted in person or by telephone and will be scheduled for a maximum of thirty (30) minutes.

4.6 PROTEST PROCEDURE

This procedure is available to Consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the

EXHIBIT C Weatherization – Pilot Guidelines

Consultant is allowed five (5) business days to file a protest of the acquisition with the RFQQ Coordinator. Protests may be submitted by facsimile, but should be followed by the original document.

Consultants protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to Consultants under this procurement.

All protests must be in writing and signed by the protesting party or an authorized agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFQQ Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of the evaluator
- Errors in computing the score
- Non-compliance with procedures described in this procurement document or current COMMERCE policy

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) An evaluator's professional judgment on or assessment of the quality of a Response, or 2) COMMERCE'S assessment of its own and/or other agencies' needs or requirements.

Upon receipt of a protest, a protest review will be held by the COMMERCE. The COMMERCE Director or an employee designated by the Director who was not involved in the procurement, will consider the record and all available facts and issue a decision within ten (10) business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another Consultant that submitted a Response, such Consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFQQ Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold COMMERCE'S action, or
- Find only technical or harmless errors in COMMERCE'S acquisition process and determine COMMERCE to be in substantial compliance and reject the protest, or
- Find merit in the protest and provide COMMERCE options which may include:
 - Correct the errors and re-evaluate all Responses
 - Reissue the solicitation document and begin a new process
 - Make other findings and determine other courses of action as appropriate

If COMMERCE determines that the protest is without merit, COMMERCE will enter into a contract with the apparently successful bidder. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

5 RFQQ EXHIBITS

- Exhibit A Certifications and Assurances
- Exhibit B Workers' Rights Certification
- Exhibit C Weatherization – Pilot Guidelines
- Exhibit D Proposed Project List (Excel Workbook) – Deferral and Fuel-Switching tabs

CERTIFICATIONS AND ASSURANCES

1. I/we make the following certifications and assurances as a required element of the Response to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):
2. I/we declare that all answers and statements made in the Response are true and correct.
3. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single Response.
4. The attached Response is a firm offer for a period of 60 days following receipt, and it may be accepted by COMMERCE without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
5. In preparing this Response, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this Response or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
6. I/we understand that COMMERCE will not reimburse me/us for any costs incurred in the preparation of this Response. All Responses become the property of COMMERCE, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this Response.
7. Unless otherwise required by law, the prices and/or cost data that have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
8. I/we agree that submission of the attached Response constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
9. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a Response for the purpose of restricting competition.
10. I/we grant COMMERCE the right to contact references and others, who may have pertinent information regarding the Proposer's prior experience and ability to perform the services contemplated in this procurement.
11. If any staff member(s) who will perform work on this contract has retired from the State of Washington under the provisions of the 2008 Early Retirement Factors legislation, his/her name(s) is noted on a separately attached page.

We (circle one) **are** / **are not** submitting proposed Contract exceptions. (See Section 2.12, Contract and General Terms and Conditions.) If Contract exceptions are being submitted, I/we have attached them to this form.

On behalf of the Consultant submitting this Response, my name below attests to the accuracy of the above statement. We are submitting a scanned signature on this form with our Response.

Signature of Proposer

Title

Date

**CONTRACTOR CERTIFICATION
EXECUTIVE ORDER 18-03 – WORKERS’ RIGHTS
WASHINGTON STATE GOODS & SERVICES CONTRACTS**

Pursuant to the Washington State Governor’s Executive Order 18-03 (dated June 12, 2018), the Washington State Department of Commerce is seeking to contract with qualified entities and business owners who certify that their employees are not, as a condition of employment, subject to mandatory individual arbitration clauses and class or collective action waivers.

Solicitation No.: 2019HIP-001

I hereby certify, on behalf of the firm identified below, as follows (check one):

NO MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES. This firm does NOT require its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

OR

MANDATORY INDIVIDUAL ARBITRATION CLAUSES AND CLASS OR COLLECTIVE ACTION WAIVERS FOR EMPLOYEES. This firm requires its employees, as a condition of employment, to sign or agree to mandatory individual arbitration clauses or class or collective action waivers.

OR

This firm certifies it has no employees.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

FIRM NAME: _____
Name of Contractor/Bidder – Print full legal entity name of firm

By: _____
Signature of authorized person Printed Name

Title: _____ Place: _____
Title of person signing certificate Print city and state where signed

Date: _____

Return Contractor Certification to Procurement Coordinator as part of your complete response.

Weatherization - Pilot Programs

Replaces: None

See also:
Request for Qualifications and Quotations (RFQQ) dated December 10, 2019
[Heating Oil Pollution Liability Insurance Program](#)

PILOT PROGRAM GUIDELINES

1. **Pilot Program Purpose:** The intent of these Pilot Programs is to enhance, improve, and supplement the Weatherization (Wx) Program. The core goal is to enable a Wx project reducing the need for Energy Assistance, saving energy, and using energy efficiently.

Commerce will give preference to identified comprehensive pilot projects qualified to receive funding for both a pilot project and Wx project. Applicants will receive more points in their application for identified comprehensive projects.

2. **Pilot Program Funding:** Commerce shall award Pilot Program Funding to successful Request for Qualifications and Quotations (RFQQ) Local Agency applicants.
 - a. **Maximum Awards:** The maximum funding amount for each Local Agency pilot program is \$200,000.
 - b. **Unobligated Funds:** Any funds not initially awarded or unobligated by March 1, 2021 may be re-obligated at Commerce's discretion.
 - c. **Expend or Return:** Local Agencies shall either expend entire award or de-obligate and return unspent funds by March 1, 2021.
3. **Pilot Program Projects:** Local Agencies shall identify potential comprehensive projects in their RFQQ Response proposed scope of work application, using the excel spreadsheet(s) provided in the RFQQ. The number and extent of possible projects will help determine the amount of funding Local Agencies are requesting.

Commerce acknowledges not all projects initially identified will result in viable projects for these pilots.

4. **Pilot Program Rules:** Local Agencies shall follow all Weatherization Program requirements except as amended herein. Since the nature of a Pilot Program is temporary, investigational, and project specific, we request Local Agencies contact Commerce with any questions, concerns, or conflicts.
 - a. **Eligible Clients:** Clients that are income eligible for the Weatherization Program are eligible for a Pilot Program. See **Policy 1.3.2, *Setting Period of Eligibility***, for the eligibility timeframe.

- b. **Eligible Projects:** Both Single Family and Multifamily projects are eligible for either the Fuel-Switching pilot or the Deferral pilot, but not both. A project in either pilot may also receive Weatherization, Plus Health, and HRLP funding. Multifamily projects shall receive Landlord contribution. See **Policy 1.4.2, *Leveraging Owner Contributions*** for more information.
5. **Pilot Program Reporting:** Local Agencies shall report Pilot Program and Projects:
- a. In Weatherization Information Data System (WIDS), and
 - b. As requested by Commerce to capture additional detail and data points.
6. **Prevailing Wage:** All Pilot Program projects are subject to prevailing wage law

A. DEFERRAL PILOT

1. Deferral Pilot Program Purpose:

- Complete Wx projects currently in deferral or postponed status due to structural, mechanical, and other physical conditions that cannot be addressed otherwise.
- Develop best practices for tracking deferrals.
- Develop understanding of current deferral climate in WA State related to: type and cost of repair required to complete Wx projects.
- Use outcomes to revise Washington State Wx policies and procedures to promote consistent and cost-effective approaches to addressing deferrals.

2. Project Elements to Qualify for Deferral Pilot:

- a. **Deferred or Postponed:** Weatherization (Wx) projects deferred or postponed for repair needs beyond the scope of Wx, may qualify for the Deferral Pilot Program.
- b. **Weatherization Opportunities:** The purpose of Deferral Pilot Program Repairs is to complete repairs required to move Wx projects forward to completion. Projects shall have a minimum of two Wx Major Measures available.
- c. **Allowable Project Types:** Local Agencies shall use Deferral Pilot funding to repair physical building related issues, in compliance with Matchmaker (Capital) Funding requirements. Client related issues, including behavioral issues are beyond the scope of this pilot program. *Examples* of project types not allowed include, but are not limited to: Hoarding, Landlord participation refusal, and No Wx opportunities.

3. **Deferral Pilot Project Funding Maximum:** The maximum funding amount for each Deferral pilot project is \$25,000. This amount includes project support costs, installed measures costs, and costs associated with state and local code requirements.

B. FUEL-SWITCHING PILOT

1. Fuel-Switching Pilot Program Purpose:

- Reduce high energy burden of clients receiving LIHEAP energy assistance.
- Develop understanding of costs and scope of work throughout Washington State associated with replacing existing propane and oil heating systems with high efficiency electric heating systems.
- Use outcomes to revise Washington State Wx policies and procedures pertaining to fuel-switching.

2. Project Elements to Qualify for Fuel-Switching Pilot:

- a. **Oil or Propane Heat:** The existing primary heating system shall be oil or propane.
- b. **Weatherization Opportunities:** Local Agencies shall prioritize comprehensive pilot projects combining Fuel-Switching and Wx.
- c. **High Efficiency Heating System Replacements:** Primary replacement heating systems shall use heat pump technology. This includes standard heat pumps and ductless heat pumps. Equipment shall be manufactured by a company listed in the Air Conditioning, Heating and Refrigeration Institute (AHRI) Unitary Directory. See **Policy 5.5.6, Ductless Heat Pumps (DHP)** for more DHP information.
 - (1) **Code Compliance:** Follow all applicable building codes.
 - (2) **Permits:** Obtain permits and final local jurisdiction inspections, as needed.
 - (3) **Installation:** Install per manufacturer's installation instructions.
 - (4) **Equipment Efficiency Requirements:**
 - (a) **Heat Pumps:** The heat pump equipment shall be rated with a Seasonal Energy Efficiency Ratio (SEER) rating of 16 or greater and a Heating Seasonal Performance Factor (HSPF) of 9.0 or greater
 - (b) **Ductless Heat Pumps:** The ductless heat pump equipment shall be rated with a HSPF of 10.0 or greater if utilizing a single head or a HSPF of 9.0 or greater if utilizing multiple heads.
 - (5) **Sizing:** Heat load calculation and sizing calculation are required. Use Manual J and S, or equivalent to size equipment properly.
 - (6) **Ductwork:**
 - (a) Wherever possible, Local Agencies shall use the existing ductwork.
 - (b) Airflow evaluation and ductwork sizing is required.

- d. **Decommission Existing Heating Systems:** Local Agencies shall decommission the existing oil or propane heating system, including the fuel tank in compliance with state and local laws. This may mean either leaving in-place or removing and disposing of system elements properly.
- e. **Documentation**
 - (1) Copy of final passed local jurisdiction for permits.
 - (2) Copy of AHRI certification.
 - (3) Copy of the heat load/sizing calculation.
 - (4) Manufacturer’s installation instructions.
 - (5) Pilot Program Reporting, as requested. See **Section 5, Pilot Program Reporting** above.
3. **Fuel-Switching Pilot Project Funding Maximum:** The maximum funding amount for each Fuel-Switching pilot project is \$20,000. This amount includes project support costs, installed measures costs, decommissioning costs, and other costs associated with state and local code requirements.
 - a. **Installed Measure Costs:** IMCs include all elements of the replacement heating system including but not limited to: the heating equipment, ductwork and registers, and electrical work.
 - b. **Decommissioning Costs:** This includes the costs to decommission the existing fuel tank in compliance with state and local code requirements.
4. **Insurance:** If replacing oil heating system clients must first register for and obtain Pollution Liability Insurance Agency (PLIA) Heating Oil Pollution Liability Insurance.

Proposed Project List (Excel Workbook) – Deferral and Fuel-Switching tabs



Pilots-Deferral-and-F
uel-Switching.121019.x

[Exhibit-D-Pilots-Deferral-and-Fuel-Switching.121019](#)

MEMORANDUM OF UNDERSTANDING

Between

[Tribe]

and

Department of Social and Health Services, Aging and Long-Term Support Administration

Division of Adult Protective Services

I. Purpose

This Memorandum of Understanding (Agreement) is executed between [Tribe] and Department of Social and Health Services (Department), Aging and Long-Term Support Administration (AL TSA), Division of Adult Protective Services (APS) to provide for a direct government-to-government relationship between the Tribe and APS for collaboration on jurisdictional issues with, assistance on, and coordination in the investigations of allegations of abandonment, abuse, financial exploitation, neglect, or self-neglect of vulnerable adults who are [describe population of Tribe].

II. Recitals

WHEREAS, [identify Tribe];

[optional] WHEREAS, [identify Tribal body with responsibilities similar to APS];

WHEREAS, [identify Tribal lands, if any, and discriminate between reservation land, land held in trust by the federal government]

WHEREAS, APS is the designated authority in Washington State, under chapter 74.34 RCW, with the primary responsibility to receive and investigate allegations of abandonment, abuse, financial exploitation, neglect, or self-neglect of vulnerable adults; and to provide protective and other services to vulnerable adults,;

WHEREAS, with the Centennial Accord of 1989 as a basis, APS and [Tribe] respects the sovereignty of each other, and recognizes that a direct government-to-government relationship will better achieve the Parties' mutual goal of positive outcomes for vulnerable adults;

WHEREAS, under DSHS Administrative Policy 7.01, APS is committed to consulting and collaborating with [Tribe] in order to ensure quality and comprehensive service delivery to all [Tribal members];

WHEREAS, under Revised Code of Washington (RCW) 74.34.067(8), APS and [Tribe] may enter into agreements regarding the investigation of abandonment, abuse, financial exploitation, neglect, or self-neglect of vulnerable adults on property over which [Tribe] has exclusive jurisdiction; and whether [Tribe] may assume jurisdiction of the matter; and

NOW, THEREFORE, the [Tribe] and APS (collectively, the Parties) agree to as follows:

III. Definitions

1. Unless the context clearly provides otherwise, all definitions under Revised Code of Washington (RCW) 74.34.020 apply.
2. "Allegation" means an allegation or allegations of abandonment, abuse, financial exploitation, neglect, or self-neglect of a vulnerable adult.
3. "Revised Code of Washington (RCW)" means the RCW as existing or hereafter amended or enacted.
4. "Tribal lands" means [describe reservation and trust lands].
5. "Trust land" means [Tribe's] land that is held in trust by the federal government.

IV. Division of Responsibilities

1. Jurisdiction

1.1. Alleged victim is a member of [Tribe] and lives on tribal lands

1.1.1. When the alleged victim is a member of [Tribe], and lives on tribal lands, [APS or Tribe] shall have jurisdiction over investigation of the allegation.

1.1.2. [optional - if APS has jurisdiction in 1.1.1] Upon written or electronic notice of the intent to do so, [Tribe] may assume jurisdiction over the investigation of an individual allegation. If [Tribe] assumes jurisdiction, neither APS nor its employees may participate in such investigation.

1.2. Alleged victim is not a member of [Tribe] and lives on tribal lands

1.2.1. When the alleged victim is not a member of [Tribe], and lives on tribal lands, [APS or Tribe] shall have jurisdiction over investigation of the allegation.

1.2.2. [optional - if APS has jurisdiction in 1.2.1] Upon written or electronic notice of the intent to do so, [Tribe] may assume jurisdiction over the investigation of an individual allegation. If [Tribe] assumes jurisdiction, neither APS nor its employees may participate in such investigation.

1.3. Alleged victim is a member of [Tribe] and does not live on tribal lands

1.3.1. APS shall have jurisdiction over investigations an allegation where the alleged victim is a member of [Tribe] and does not live on tribal lands.

2. Allegations

2.1. If APS has information that the allegation is criminal or is placing a vulnerable adult on tribal property at potential risk of personal or financial harm, APS will inform via [modality]:

2.1.1. [Tribal representative]

2.2. If either Party receives an allegation where the investigation of such allegation would be under the jurisdiction of the other under this Agreement, the Party receiving the allegation shall:

2.2.1. Promptly, within [time] of knowledge of the investigation, notify the other party via [modality]. Contacts for notification are:

2.2.1.1. [Tribe]

2.2.1.2. [APS]

2.2.2. Upon notification under 2.2.1, the other Party shall be deemed to be informed of the allegation, and shall have jurisdiction over the investigation of the allegation.

3. Protective Services

3.1. APS shall offer protective services under RCW 74.34.067 to vulnerable adults where APS has jurisdiction over the investigation.

3.2. [optional] The [Tribe] may offer services, in addition to those protective services offered by APS, to Tribal members or non-Tribal members residing on tribal lands.

3.3. The entity that has jurisdiction over an investigation shall be responsible for petitioning for guardianship.

4. Points of Contact

4.1. Points of contact for APS

4.2. Points of contact for [Tribe]

5. Sharing of Information

5.1. In accordance with RCW 74.34.067, to the maximum extent possible, and otherwise allowed by state and federal law, the Parties agree to share information regarding allegations, investigations, and protective services in order to carry out the purpose of this Agreement.

V. Review and Modifications

This Agreement will be reviewed annually during the development of the DSHS Administrative Policy 7.01 Plan and Progress Report. Either party may request modification to this Agreement. Any modification must be agreed to by the Parties.

VI. Termination

Either party may terminate this Agreement with written notice to the other party. The effective date of termination is the thirtieth (30th) day after the day that the non-moving party receives written notice of the moving party's intent to terminate.

VII. Merger

This Agreement constitutes the entire agreement and understanding of the Parties and supersedes any and all prior agreements and understandings, oral or written, relating to the subject matter thereof. The Parties hereby acknowledge and represent, by signature, that each have not relied on any representation, assertion, guarantee, warranty, collateral contract or other assurance, except those set out in this Agreement, made by or on behalf of any other party or any other person or entity whatsoever, prior to the execution of this Agreement.

VIII. Effective Date

This Agreement is effective on the date the Parties have both executed this Agreement.

[Tribal representative]

[APS representative]

[date]

[date]

cc: [add people]

TEMPLATE

SAVE THE DATE

Tribal Home and Community Based Services

Aging and Long-Term Support Administration and AAAs working with Tribal Nations

UPCOMING SUMMITS

Spring Summit: April 16-17, 2020

Oxford Suites in Spokane, WA

Fall Summit: September 10-11, 2020

Great Wolf Lodge in Grand Mound, WA

Goals

- Expand the leadership role of tribes in the design and operations of Medicaid funded programs
- Strengthen the ability of state Medicaid long-term services and support to meet the unique needs and cultures of tribal communities
- Improve seamless access to Medicaid funds and services
- Reduce the use of institutional services
- Design and implement effective programs
- Maximize fiscal resources



TRIBAL HCBS
States and AAAs working with Tribal Nations



Washington State
Department of Social
& Health Services

Transforming lives

Contact Information

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