



**SUPPORTIVE AND/OR HOUSING SERVICES MASTER AGREEMENT**

**WORK ORDER SOLICITATION SHSMA-WOS\_LS-002**

**FOR**

**LEGAL AND TECHNICAL ASSISTANCE SERVICES**

**LOS ANGELES COUNTY DEPARTMENT OF HEALTH SERVICES**

**JULY 2019**

**TABLE OF CONTENTS**

| <b>SECTION</b>   | <b>PAGE</b> |
|--|-------------|
| <b>1.0 INTRODUCTION.....</b>   | <b>1</b>    |
| <b>2.0 SCOPE OF SERVICES.....</b>  | <b>1</b>    |
| <b>3.0 RATES .....</b>   | <b>5</b>    |
| <b>4.0 WORK ORDER TERM.....</b>  | <b>5</b>    |
| <b>5.0 RESPONDENT QUESTIONS .....</b>                                    | <b>5</b>    |
| <b>6.0 WORK ORDER SOLICITATION TIMETABLE .....</b>                       | <b>6</b>    |
| <b>7.0 RESPONDENT QUESTIONS .....</b>                                    | <b>6</b>    |
| <b>8.0 RESPONSE INSTRUCTIONS .....</b>                                   | <b>6</b>    |
| <b>9.0 RESPONSE SUBMISSION REQUIREMENTS .....</b>                        | <b>7</b>    |
| <b>10.0 TRUTH AND ACCURACY OF REPRESENTATIONS.....</b>                   | <b>8</b>    |
| <b>11.0 REVIEW PROCESS.....</b>  | <b>8</b>    |
| <b>12.0 DISQUALIFICATION PROCESS.....</b>                                | <b>9</b>    |
| <b>13.0 SELECTION PROCESS .....</b>                                      | <b>9</b>    |
| <b>14.0 NOTICE TO RESPONDENTS REGARDING THE PUBLIC RECORDS ACTS.....</b> | <b>9</b>    |
| <b>15.0 COUNTY RIGHTS AND RESPONSIBILITIES.....</b>                      | <b>10</b>   |

**EXHIBITS**

**1 – STATEMENT OF WORK**

**2 – SERVICE CATEGORIES AND SERVICE PLANNING AREAS**

**3 – COMPLIANCE WITH ENCRYPTION REQUIREMENTS**

## **WORK ORDER SOLICITATION LEGAL AND TECHNICAL ASSISTANCE SERVICES**

### **1.0 INTRODUCTION**

The homelessness crisis in Los Angeles County (County) has been increasing and demands an urgent, coordinated response from County, cities, and community partners throughout the region. In response to the crisis, the County Board of Supervisors approved the County Homeless Initiative, which includes the following strategies: 1) Strategy C4 – Establish a Countywide Supplemental Security Income (SSI) Advocacy Program for People Experiencing Homelessness or at Risk of Homelessness and 2) Strategy C6 – Targeted SSI Advocacy for Inmates.

The County-wide Benefits Entitlement Services Team (CBEST), is a program under the Department of Health Services (DHS) Housing for Health division and provides targeted benefit advocacy services, through the County's Benefits Advocacy Services contractors, to assist individuals who are homeless or at risk of homelessness in obtaining sustainable income through programs such as SSI or Social Security Disability Income (SSDI). Such advocacy services include: screening and assessment to ensure clients meet medical and non-medical requirements for SSI, SSDI; coordination of health and mental health records to support the SSI, SSDI application; assistance with obtaining additional health and mental health documentation as needed; legal and technical assistance services and consultations; internal quality assurance reviews; acting as a liaison with Social Security Administration (SSA) and State of California Department of Social Services Disability Determination Services; reconsideration filing for denied SSI and/or SSDI applications; and coordination with DHS health, behavioral health and permanent supportive housing – intensive case management service providers who serve the client.

Nationally, about 37% of SSI or SSDI applications are initially approved. However, for homeless persons without guidance during the application process, the acceptance rate is roughly only 10–15%. The County believes that providing clients with assistance and advocacy services will greatly increase their chances of successfully securing benefits that can increase their income through state and federal disability benefits & entitlements. By securing additional income sources that can be used to pay for their housing, clients can better maintain sustainable housing thereby reducing their reliance upon County resources and assistance resulting in long term savings to the County.

### **2.0 SCOPE OF SERVICES**

The selected Respondent shall assist clients experiencing homelessness, or at risk of being homeless to resolve legal barriers that impact access to income. Legal and Technical Assistance Services must be provided to all clients within the

County's Service Planning Areas (SPAs) 1 through 8, as referenced in Exhibit 1 – Statement of Work (SOW). With this Work Order Solicitation (WOS), the County is accepting Responses to select a pool of Contractors to provide Technical Assistance and/or Legal Services under the following categories for each SPA:

## **2.1 Technical Assistance Services:**

### **2.1.1 Category 1 – Quality Review for SSI, SSDI, and CAPI Technical Assistance Services**

The Respondent's attorney(s) shall conduct quality assurance reviews of all initial SSI, SSDI, Cash Assistance Program for Immigrants (CAPI) and benefits application claims to ensure clients meet both non-medical (e.g., legal status, educational, training, and/or employment) and medical requirements prior to application submission by the County's Benefits Advocacy Services contractors. This review will include a thorough evaluation of client medical, psychological, legal, financial, and educational background.

#### **2.1.1.1 Personnel Requirements**

The Respondent's personnel providing Technical Assistance Services under Category 1 must be licensed attorney(s) in the State of California and be in good standing with the State Bar of California. Attorney(s) must have at least two (2) years of continuous legal experience in the last two (2) years preparing and/or reviewing initial SSI, SSDI, and/or CAPI benefits claims prior to submission for a population similar to that of the clients described in Exhibit 1 – SOW.

### **2.1.2 Category 2 – Immigration and Identity Technical Assistance Services**

For referrals that need immigration or identity document services to verify eligibility for disability benefits prior to proceeding with benefits claims, the Respondent shall assist clients with but not limited to the following:

2.1.2.1 Reviewing immigration documents; and

2.1.2.2 Conducting background checks; and

2.1.2.3 Requesting a full immigration file; and

2.1.2.4 Obtaining identity documents, such as birth certificates, government issued identification, social security card to confirm identity.

**NOTE:** All cases referred to the Respondent will remain with and are the responsibility of the Respondent until all services are completed, even if the determination does not occur until after the Work Order expiration date. As such, the Respondent will be paid the Fee-For-Services rate that was in effect during the period the client was referred by the County or County's Benefits Advocacy Services contractors to the Respondent.

#### **2.1.2.5 Personnel Requirements**

The Respondent's personnel providing Technical Assistance Services under Category 2, must be licensed attorney(s) in the State of California and be in good standing with the State Bar of California. Attorney(s) must have at least two (2) years of continuous legal experience in the last two (2) years, specific to immigration law, to a population similar to that of the clients described in Exhibit 1 – SOW.

**NOTE:** For non-immigration direct client services can be provided by non-attorney staff.

## **2.2 Legal Services**

### **2.2.1 Category 3 – SSI or SSDI Appeals Representation**

The Respondent shall screen all referrals for eligibility. If the Respondent deems that the referral is not eligible, the Respondent will notify the County or the Benefit Advocacy contractor(s) with a justification. If the client is eligible, the Respondent shall represent the client as follows:

2.2.1.1 Adult and Children SSI, SSDI claimants who have received denials at any appeals representation stage.

2.2.1.2 SSI beneficiaries transitioning from children to adults, particularly foster youth or CalWorks recipients, who met the disability requirements as children and are now required to prove they meet the disability requirements as adults.

2.2.1.3 SSI, SSDI beneficiaries whose benefits have been terminated based on disability cessation, known as, Containing Disability Renewals (CDRs).

2.2.1.4 SSI beneficiaries whose benefits have been terminated or reduced based on non-disability reasons (income, resources, living arrangement, immigration status, etc.).

2.2.1.5 SSI, SSDI beneficiaries who have received overpayments and are appealing or requesting Waivers of Overpayment.

**NOTE:** All cases referred to the Respondent will remain with and are the responsibility of the Respondent until all services are completed, even if the determination does not occur until after the Work Order expiration date. The Respondent will be paid the Fee-For-Services rate that was in effect at the time the client was referred to the Respondent.

#### **2.2.1.6 Personnel Requirements**

The Respondent's personnel providing Legal Services under Category 3, must be licensed attorney(s) in the State of California of which such attorneys must be in good standing with the State Bar of California. Attorney(s) must have at least two (2) years of continuous legal experience in the last two (2) years providing Adult and Children SSI and SSDI appeals services to a population similar to that of the clients described Exhibit 1 – SOW.

### **2.2.2 Category 4 – CAPI Appeals Representation**

The Respondent shall screen all referrals for eligibility. If the Respondent deems that the referral is not eligible, the Respondent will notify the County or the Benefit Advocacy contractor(s) with a justification. If the client is eligible the Respondent shall represent the client as follows:

2.2.2.1 CAPI clients who have received denials at the initial application phase.

2.2.2.2 CAPI clients whose benefits have been terminated after recertification.

2.2.2.3 CAPI beneficiaries whose benefits have been terminated or reduced based on non-disability reasons (income, resources, living arrangement, immigration status, etc.).

**NOTE:** All cases referred to the Respondent will remain with and are the responsibility of the Respondent until all services are completed, even if the determination does not occur until

after the Work Order expiration date. The Respondent will be paid the Fee-For-Service rate that was in effect at the time the client was referred to the Respondent.

#### **2.2.2.4 Personnel Requirements**

The Respondent's personnel providing Legal Services under Category 4, must be licensed attorney(s) in the State of California and be in good standing with the State Bar of California. Attorney(s) must have at least two (2) years of continuous legal experience in the last two (2) years providing CAPI appeals services to a population similar to that of the clients described in Exhibit 1 – SOW.

### **3.0 RATES**

The rates under this Work Order shall be as follows:

| <b>Category</b> |  | <b>Rate per client per month</b> |
|-----------------|--|----------------------------------|
| Category 1      | Quality Review for SSI, SSDI, and CAPI Technical Assistance Services | \$175                            |
| Category 2      | Immigration and Identity Technical Assistance Services               | \$175                            |
| Category 3      | SSI or SSDI Appeals Representation                                   | \$350                            |
| Category 4      | CAPI Appeals Representation  | \$350                            |

### **4.0 WORK ORDER TERM**

The term of this Work Order is anticipated to be September 1, 2019, through June 30, 2022, with a five (5) year optional period through June 30, 2027. The optional period shall be exercised at the Health Agency Director's discretion.

### **5.0 MINIMUM REQUIREMENTS**

Interested and qualified Respondents that can demonstrate their ability to successfully provide the required Legal and Technical Assistance Services outlined in Exhibit 1 – SOW, are invited to submit a Response provided they meet the Minimum Requirements below:

- 5.1 Respondents shall have a current status as a Supportive and/or Housing Services Master Agreement (SHSMA) contractor. Respondents that are not current SHSMA contractors may respond to this WOS if they submit a Statement of Qualifications to DHS' Request for Statement of Qualifications (RFSQ) for Supportive and/or Housing Services and are issued a Master Agreement. Respondents that fall into this latter category must respond to

BOTH the RFSQ and this WOS by August 12, 2019. These Respondents must meet the minimum requirements to be a SHSMA contractor in order for their Response to this WOS to be considered. The RFSQ can be found at: <http://cg.dhs.lacounty.gov/>.

5.2 Respondent must have three (3) years of experience within the last three (3) years providing services related to one or more of the categories in Section 2.0 of this WOS. All Respondent’s attorneys providing Legal Services under this Work Order shall have a valid California State Bar certification.

**6.0 WORK ORDER SOLICITATION TIMETABLE**

- Work Order Solicitation Release: .....07/30/19
- Written Questions Due Date/Time: .....08/01/19, 3:00 p.m. PST
- Response Due Date/Time: .....08/12/19, 11:00 a.m. PST

**7.0 RESPONDENT QUESTIONS**

Questions **must be submitted by e-mail** to the contact person identified below and must be received no later than August 1, 2019 at 3:00 p.m. PST. All questions, without identifying the submitting Respondent, will be compiled and, along with the appropriate answers, will be made available via e-mail to all Respondents.

When submitting questions, be as specific as possible, indicating the area of the WOS that prompted the question. The County reserves the right to group similar questions when providing answers.

Questions should be emailed to the individual identified below:

Cathy Castellon, Contract Analyst  
County of L.A. - Dept. of Health Services  
Contracts and Grants Division  
E-mail: [mcastellon2@dhs.lacounty.gov](mailto:mcastellon2@dhs.lacounty.gov)

**8.0 RESPONSE INSTRUCTIONS**

The Response to this WOS shall include each of the following in the prescribed format and order:

**8.1 Cover Memo**

Identify the WOS by title and number; firm name and address; and the name, telephone number, and e-mail address of the person authorized to make representations for the Respondent during negotiations.



## **8.2 Agency Experience**

- 8.2.1 Provide a detailed description of your agency's experience that demonstrates it meets the Minimum Requirements in Section 5.0.
- 8.2.2 Provide the resume and the description of duties for the full-time Supervising Attorney that will be overseeing the Work Order as described in Exhibit 1 – SOW, Section 7.1 Supervising Attorney.

## **8.3 Required Forms**

- 8.3.1 The Respondent shall complete and submit Exhibit 2 – Service Categories and SPAs. Respondent shall “check” each service category and SPA where the Respondent is able to provide and meets the specific requirements as indicated in Exhibit 1 – SOW, Sections 4.0 Technical Assistance Services, 5.0 Legal Services, and 6.0 Work Hours/Contractor's Site.
- 8.3.2 The Respondent shall complete and submit Exhibit 3 – Respondent's Compliance with Encryption Requirements.

## **8.4 Approach and Methodology**

- 8.4.1 Provide a narrative response for each of the Category(ies) in Section 2.0 of this WOS for which your agency will submit a response. The narrative shall include: 1) the SPA(s) location where the Legal and Technical Assistance Services will be provided; 2) the attorney(s) name, resume, and any required certification and/or licenses; 3) any non-legal staff, name, resume and required certification; and 4) a description of how your agency will collaborate with the County Benefit Advocacy Services contractors to provide the Legal and Technical Assistance Services to clients.
- 8.4.2 Provide an implementation plan describing how your agency will commence Services on September 1, 2019, for clients.
- 8.4.3 Provide a narrative describing your agency's process for shredding documents as indicated in Exhibit 1 – SOW, Section 7.7 Shred Documents.

## **9.0 RESPONSE SUBMISSION REQUIREMENTS**

The Respondent shall **email** one (1) Response in PDF format by the Response Due Date and Time to the individual identified below:

ATTN: Cathy Castellon  
County of L.A. - Dept. of Health Services  
Contracts and Grants Division  
**Email Address:** [mcastellon2@dhs.lacounty.gov](mailto:mcastellon2@dhs.lacounty.gov)

All Respondents shall provide the name of their Agency and the title and number of the WOS on the subject line.

It is the sole responsibility of the submitting Respondent to ensure that its Response is received by the "Response Due Date/Time." Any Responses received after the "Response Due Date/Time," as listed in the WOS Timetable, may be eliminated from consideration by DHS, at its sole discretion.

## **10.0 TRUTH AND ACCURACY OF REPRESENTATIONS**

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Response shall be sufficient cause for rejection of the Response. The review and determination in this area shall be at the DHS Director of Contracts and Grant's sole judgment and his judgment shall be final.

## **11.0 REVIEW PROCESS**

The County reserves the sole right to exercise its judgment concerning the selection and review of the contents of the Responses submitted pursuant to this WOS and to determine which Respondent best serves the interests of the County.

As a result of this WOS, the County may:

- 1) Request further information, documents, presentations, and/or conference call or in-person interviews substantiating Respondents' qualifications, experience, and readiness to provide the services described in the WOS;
- 2) Award a Work Order to Respondent(s); and/or
- 3) Take no further action at this time on this matter.

All Responses will be reviewed based on the following criteria:

### **11.1 Adherence to Minimum Requirements**

The County will review the Respondent's Response to Section 8.2.1 to determine if the Respondent meets the Minimum Requirements as outlined in Section 5.0 – Minimum Requirements. Failure by the Respondent to comply and demonstrate that it meets the Minimum Requirements may, in the County's sole discretion, result in its Response being disqualified without further review and consideration.

## 11.2 Respondent's Qualifications and Experience

The County will review the Respondent's narrative responses to Sections 8.2.2 and 8.4 to determine if the Respondent has the qualifications and capacity to provide the Legal and Technical Assistance Services outlined in Exhibit 1 – SOW.

## 12.0 DISQUALIFICATION REVIEW

A Response may be disqualified from consideration because the County determined it was non-responsive at any time during the review process. If the County determines that a submission is disqualified due to non-responsiveness, the County shall notify the Respondent in writing.

## 13.0 SELECTION PROCESS

Respondents who are notified by DHS that they appear to meet the Minimum Requirements and have the necessary qualifications and experience may still not be recommended for a Work Order if other requirements necessary for award have not been met. Other requirements may include acceptance of the terms and conditions of the SHSMA, and/or satisfactory documentation that required insurance will be obtained. Only when all such requirements have been met to the County's satisfaction can a Respondent, be regarded as "selected" for recommendation of a Work Order. All Respondents will be informed of the final selections.

## 14.0 NOTICE TO RESPONDENTS REGARDING THE PUBLIC RECORDS ACT

- 14.1 Responses to this solicitation shall become the exclusive property of the County.
- 14.2 Exceptions to disclosure are those parts or portions of all Respondents that are justifiably defined as business or trade secrets, and plainly marked by the Respondent as "Trade Secret", "Confidential", or "Proprietary".
- 14.3 The County shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law. **A blanket statement of confidentiality or the marking of each page of the Response as confidential shall not be deemed sufficient notice of exception. The Respondents must specifically label only those provisions of their respective Response which are "Trade Secrets", "Confidential", or "Proprietary" in nature.**
- 14.4 In the event the County is required to defend an action on a Public Records Act request for any of the aforementioned documents, information, books,

records, and/or contents of a Response marked "Confidential," "Trade Secrets," or "Proprietary," Respondent agrees to defend and indemnify County from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the Public Records Act request.

## **15.0 COUNTY RIGHTS AND RESPONSIBILITIES**

The County has the right to amend, re-issue, or cancel this WOS by written addendum. The County is responsible only for that, which is expressly stated in this solicitation document and any authorized written addenda thereto. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Response not being considered, as determined at the sole discretion of the County. The County is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.