

## **DISASTER CASE MANAGEMENT PROGRAM CONTRACTOR**

Volunteer Florida is currently looking for a contractor to handle the management of disaster case management services to support recovery from the 2022 Hurricane Ian (DR-4673-FL). Total funding available for this contract is approximately \$1,876,631.

### **Project Summary**

The Disaster Case Management Program (DCMP) funds have been awarded to Volunteer Florida by the Federal Emergency Management Agency (FEMA) to provide disaster case management services to survivors of DR-4673-FL. The projected number of approved registrants will be determined using the FEMA Disaster Case Management Program Guidance. Federal DCMP provides eligible Hurricane Ian survivors with case management for unmet needs to aid individuals in recovery efforts.

### **Contractor Detail Summary**

The successful contractor will assist with the State of Florida's recovery efforts by contracting with Volunteer Florida as the primary point of contact with provider agencies and giving overall leadership to the project. This contractor will coordinate and oversee all aspects of the DCMP, serving survivors of Hurricane Ian.

The contractor will manage and build out staff to adequately administer the DCMP. The contractor will be responsible for oversight management of the FEMA Disaster Case Management Program providing administrative, program execution, reporting and closeout activities necessary for the grant program. Contractor will coordinate with FEMA and other Federal/State agencies as required.

Further, this contractor will work to identify qualified service providers through an application process. They will provide oversight of Program Managers as well as management of a portfolio of sub-grantees, ensuring sub-grantees make affected communities and counties aware of the types of individual assistance available. They will further collect data, analyze, and prepare reports within strict deadlines. Additionally, contractor will develop, support and conduct training and technical assistance to build capacity of sub-grantee organizations.

### **Desired Skills and Experience**

It is anticipated that the successful contractor will have a working knowledge and prior experience working in coordination or implementation of a similar DCMP program and working with direct grant recipients in the management and administration of the FEMA Individual Assistance Programs and Disaster Case Management Programs.

Proposer should have an office location within 1 of the 26 IA declared counties within 10 days of the contract award.

Volunteer Florida is the state's lead agency for volunteerism and national service for Florida. Volunteer Florida administers over \$24M in federal and state funding to deliver high-impact national service and volunteer programs in Florida. For more information about our organization, please visit us at: <http://www.volunteerflorida.org/>

**To apply for this contract, please submit an application via Blackbaud by February....**  
For information regarding this notice, and throughout this competitive acquisition process, interested entities shall contact:

Christy Rojas  
Emergency Management Director  
Volunteer Florida  
1545 Raymond Diehl Road, Suite 250  
Phone: 850-414-7400 ext 106  
E-mail: [christy@volunteerflorida.org](mailto:christy@volunteerflorida.org)

## Response Content:

- Executive Summary

This section should serve to introduce the scope of the response. It should include administrative information including, at a minimum, Proposer's contact name and phone number, email address and any other pertinent contact information. This section should also include a summary of the Proposer's qualifications and ability and willingness to comply with Volunteer Florida and State of Florida's requirements.

- Company Background and Experience

The Proposers should provide the below criteria for Management Services;

- a) The proposer should give a brief description of their company including brief history, corporate or organization structure, number of years in business, and copies of its latest financial statement, preferably audited
- b) This section should provide a detailed discussion of the Proposer's prior experience in working on projects similar in size, scope, and function to the proposed contract. Proposers should describe their experience in other states or in corporate and governmental entities of comparable size and diversity with reference from previous clients
- c) Proposers should clearly describe their ability to meet or exceed the desired qualifications.

- Approach and Methodology

The Proposer should provide their approach and methodology to accomplish the objectives above and services included described in Scope of Work/Services.

The Proposer should provide the below criteria for Management Services:

- a) Provide Proposer's understanding of the nature of the project and how its proposal will best meet the needs of Volunteer Florida.
- b) Define its functional approach in identifying the tasks necessary to meet requirements
- c) Provide a proposed Project Work Plan that reflects the approach and methodology, tasks and services to be performed, deliverables, timetables, and staffing.
- d) Present innovative concepts for consideration.
- e) Describe best practices garnered from previous experiences with this Scope of Work described.

- Staff Qualifications

The Proposer should provide detailed information about the experience and qualifications of the Proposer's assigned personnel considered key to the success of the project. (See position descriptions of approved positions for project)

This information should include education, training, technical experience, functional experience, specific dates and names of employees, relevant and related experience, past and present projects with dates and responsibilities and any applicable

certifications. This should also specifically include the role and responsibilities of each person on this project.

- a) Proposers should clearly describe their ability to meet or exceed the qualifications.

- Cost Proposal

The Cost Proposal shall include:

- a) Refer to the approved budget Attachment A
- b) Proposer must provide all-inclusive rates that include overtime costs, mobilization and demobilization, and any other travel expenses such as lodging and meals.

## **Response Submittal**

Proposers interested in providing information must submit responses by 5:00 p.m. EST on February 3, 2023 via Blackbaud. Responses received after the deadline or incomplete submissions will not be considered and will not be evaluated.

- Acceptance of Proposal Content

All proposals will be reviewed to determine compliance and administrative and mandatory requirements as specified in the application. Proposals that are not in compliance will be rejected from further consideration.

- Evaluation and Selection

The evaluation of proposals will be accomplished by an evaluation team, to be designated by Volunteer Florida, taking into consideration ability to work within approved budget and the other evaluation factors set forth. Scoring will be on a 100 point scale based on the components outlined in the Proposal section.

Volunteer Florida may conduct clarifying interviews in person or through conference calls prior to final approval.

- Notice of Intent to Award

The Evaluation Team shall compile the scores and make a recommendation to the Chief Executive Office of Volunteer Florida on the basis of the responsive and responsible Proposer with the highest score.

Volunteer Florida will notify the successful Proposer and proceed to negotiate terms for final contract. Unsuccessful Proposers will be notified in writing accordingly.

The award of a contract shall be subjected to the approval of Volunteer Florida.

Volunteer Florida reserves the right to make multiple awards.

- Federal Funds

The Federal Emergency Management Agency (FEMA) is providing funding for this contract. As such, Volunteer Florida and Contractor shall be in compliance with 2 CFR

200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.

- a) Contractor's Certification of No Federal or State Suspension or Debarment  
Contractor has a continuing obligation to disclose any suspensions or debarment by any government entity, including but not limited to General Services Administration (GSA). Failure to disclose may constitute grounds for suspension and/or termination of this contract and debarment from future contract. Contractor shall not employ any subcontractors pursuant to this contract that are suspended or debarred by any government entity.
- b) The Contractor must comply with 2 C.F.R.

### Scope of Work

- The contractor will manage and build out staff to adequately administer the Disaster Case Management Program (DCMP). Contractor shall be required to complete required contract reporting and other administrative duties for program activities. See Attachment B or further clarification
- Contractor will be required to attend meetings and travel within the State of Florida as needed to execute the scope of work. As of January 5, 2023 the below snapshot list the disaster service areas and approved FEMA IA applications as follows:

Individual Assistance Snapshot	
Total Regs	928,244
Daily Registrations	57
IHP \$\$ Approved	\$863,936,925
HA \$\$ Approved	\$531,827,236
ONA \$\$ Approved	\$332,109,689
Inspections Issued	259,124
Inspections Returned	257,251
Outstanding	1,873
% Complete	99.28%
Inspectors assigned	122
Max Award	2,440
Max \$ Award Disbursed	\$29,476,000
Funerals \$\$ Approved	9,464

DCMP funding is based on FEMA Individual Assistance registrations. If the original request for funding is deemed inadequate, FEMA has the potential to allow for additional funding.

**Position Descriptions:** The contractor shall provide qualified personnel as listed below to Volunteer Florida. No changes shall be made to the position titles. These are the minimum requirements for personnel assigned and paid under any resulting contract.

**1) Program Manager**

- Responsible for overall management of the DCM program including training, planning, outreach, operations, tracking, and budgeting for all matters dealing with disaster case management at the state level. Coordinates with FEMA and other Federal/State agencies as required. Responsible for overseeing individual assistance to the affected population. Ensures affected communities and counties are aware of the types of individual assistance available.

**2) Data Monitoring Specialist**

- Responsible for supporting Case Managers and assisting with input of survivor client data into the DCMP system. Conducts research for Case Managers to find resources to meet the disaster-caused unmet needs of clients.

**3) Direct Housing Coordinator**

- Responsible for supporting FEMA's Direct Housing mission to ensure that each survivor has a DCM and a sustainable housing plan. Represents the DCMP on the State Housing Task Force, which will consist of representatives from FEMA, State, LTRG's, DCM, Counties, and others in order to identify resources needed to assist survivors to leave FEMA Housing in accordance with their housing plan.

**4) Resource Coordinator**

- Responsible for maintaining a standard database of resources, especially for Case Managers and for counties that lack LTRG's. Coordinates with FLVOAD, LTRGs when possible, and other organizations with recovery resources to ensure proper referral and linkage through Case Managers to address any unmet disaster caused needs of survivors. Represents Volunteer Florida, and FL Disaster Recovery Office External Coordinators with LTRG development and mentoring in the disaster case management process.

**5) Financial Analyst**

- Responsible for invoices, payroll, reimbursement request, preparing fiscal reports and other duties related to the fiscal management of the DCM program. Responsible for preparing the fiscal reports for FEMA. Ensures that fiscal implementation aligns with the approved grant.

## Evaluation

- The Evaluation Team will evaluate and score the proposals using the criteria and scoring as follows:

Criteria	Maximum Score
Executive Summary	25
Company Background and Experience	25
Approach and Methodology	20
Staff Qualifications	20
Cost	10
<b>TOTAL SCORE</b>	<b>100</b>

- Proposals that pass the preliminary screening and mandatory requirements review will be evaluated based on information provided in the Proposal.
- The Proposal will be evaluated in light of the material and substantiating evidence presented to Volunteer Florida, not on the basis of what may be inferred.
- Proposer must receive a minimum score of 70% of total available points. Proposals not meeting the minimum score shall be rejected and not proceed to further evaluation.

## Attachment A

Personnel	Unit	Cost Per Unit	Duration	Total
Program Director	1	\$ 10,550.00	23	\$ 242,650.00
Financial Analyst	1	\$ 6,830.00	23	\$ 157,090.00
Data Monitoring Specialist	1	\$ 5,585.00	23	\$ 128,455.00
Direct Housing Specialist	1	\$ 6,830.00	23	\$ 157,090.00
Resource Coordinator	1	\$ 6,830.00	23	\$ 157,090.00
Executive Administrative Assistant	1	\$ 4,357.00	23	\$ 100,211.00
<b>Sub-Total for Personnel Cost for State/Territory/Tribe Oversight Level</b>				<b>\$ 942,586.00</b>
<b>Fringe Benefits</b>				<b>Sub-Total</b>
Fringe Benefits Rate	Rate =			\$ -
<b>Sub-Total for Personnel Cost for State/Territory/Tribe Oversight Level</b>				<b>\$ -</b>
<b>Travel</b>	<b>Unit</b>	<b>Cost Per Unit</b>	<b>Duration</b>	<b>Sub-Total</b>
Mileage/Rental Gas	1500	\$ 0.600	23	\$ 20,700.00
Overnight stays - hotel	10	\$ 130.00	23	\$ 29,900.00
Per- Diem Daily	10	\$ 69.00	23	\$ 15,870.00
Parking and Tolls	5	\$ 16.50	23	\$ 1,897.50
<b>Sub-Total for Travel for State Oversight Level</b>				<b>\$ 68,367.50</b>
<b>Supplies</b>	<b>Unit</b>	<b>Cost Per Unit</b>	<b>Duration</b>	<b>Sub-Total</b>
Office supplies	5	\$ 300.00	23	\$ 34,500.00
Cellular/internet access	5	\$ 75.00	23	\$ 8,625.00
Postage	5	\$ 25.00	23	\$ 2,875.00
		\$ -		\$ -
<b>Sub-Total for Supplies for State Oversight Level</b>				<b>\$ 46,000.00</b>
<b>Justification and Calculation of Supplies Line Items</b>				
<b>Contractual</b>	<b>Unit</b>	<b>Cost Per Unit</b>	<b>Duration</b>	<b>Sub-Total</b>
Training	1	\$ 100,000.00	One Time Cost	\$ 100,000.00
		\$ -		\$ -
<b>Sub-Total for Personnel Cost for State/Territory/Tribe Oversight Level</b>				<b>\$ 100,000.00</b>
<b>Construction</b>	<b>Unit</b>	<b>Cost Per Unit</b>	<b>Duration</b>	<b>Sub-Total</b>
<b>Non-Allowable Cost</b>				<b>\$ -</b>
<b>Other</b>	<b>Unit</b>	<b>Cost Per Unit</b>	<b>Duration</b>	<b>Sub-Total</b>
Audit	1	\$ 10,000.00	2	\$ 20,000.00
Dues and Fees	5	\$ 10.00	23	\$ 1,150.00
Occupancy	1	\$ 2,500.00	23	\$ 57,500.00
Visionlink launch fee	1	\$ 36,780.00	1	\$ 36,780.00
Visionlink monthly fees	1	\$ 25,177.00	24	\$ 604,248.00
<b>Sub-Total for Personnel Cost for State/Territory/Tribe Oversight Level</b>				<b>\$ 719,678.00</b>
<b>Justification and Calculation of Other Line Items</b>				
<b>Total Direct Charges</b>				<b>\$ 1,876,631.50</b>

## **Attachment B**

### **Disaster Case Management Program Requirements**

This document consists of excerpts from the FEMA Disaster Case Management Program Guidance and Florida's Disaster Case Management Plan that provide guidance for the applicant developing a case management program for the 2022 Hurricane Ian DR-4673-FL

#### **PROGRAM PARAMETERS**

**A. Service Area:** Florida's goal is to serve all eligible survivors in declared communities through the provision of disaster case management services. The focus of Disaster Case Management work will be in the forty-eight declared counties for DR-4673-FL. A formula for case management allocation shall be developed and applied upon grant award.

**B. Disaster-caused Unmet Need Definition:** A disaster-caused unmet need is an un-resourced item, support, or assistance that has been assessed and verified by representatives from State, Tribal, local, and Federal governments and/or voluntary and faith-based organizations as necessary for the survivor to recover from the disaster. Disaster survivor resources may include insurance payments, Federal disaster assistance (i.e. FEMA Individual and Households Program (IHP) grants, and Small Business Administration (SBA) Disaster Loans), State assistance, voluntary agency/faith based assistance and personal resources. Unmet needs may also include basic immediate emergency needs such as food, clothing, shelter or first aid and long-term needs such as financial, physical, emotional or spiritual well-being.

**C. Disaster Case Management Strategy:** The Disaster Case Management Committee of the FLVOAD drafted a plan for the state that was formally adopted by FLVOAD in 2012. The plan provides detailed information regarding all facets of the DCM program. The basic concept of operations is to assist disaster survivors in identifying unmet and long-term needs, locating and advocating for services and resources to meet the needs and coordinating among multiple service organizations to include local long-term recovery groups.

The Florida DCM Program will operate in three phases: Mobilization and Outreach, DCM Service Provision and Demobilization.

**C.1 Mobilization and Outreach:** Upon award, resources will be mobilized to support DCM services, such as staff, supplies, and facilities. Staff will undergo training in the nationally recognized United Methodist Committee on Relief (UMCOR) disaster case management curriculum, VisionLink or alternative data system, DCM Supervisory training and the consistent use of DCM standards.

Two types of outreach will be conducted. FLVOAD partners and other voluntary organizations will conduct outreach to recruit voluntary staff to augment paid staff and establish additional resources. Community outreach will be conducted to inform residents of service availability information. A multi-disciplinary approach will be necessary for successful community outreach. While not all the following methods may be utilized, the combination most feasible and effective

will be implemented: community canvassing; local nongovernmental, community organizations (NGO) with which vulnerable populations have existing relationships; social and traditional media; public information messaging; Community Emergency Response Teams; public meetings and LTRG meetings; flyers and signs; mass call out; reverse dialogic; and mass mailings. A detailed outreach and message development section is included in the Florida DCM Plan.

**C.2 Service Provision:** Once the DCM program is operational, DCM will begin the service provision phase. All clients will receive an intake to verify disaster-caused needs, resources received to date and the priority of client needs based on the scale identified in the Florida DCM Plan:

Priority 1—Urgent basic disaster-related needs for shelter, food, safety *AND* compromised health and well-being (1 or more pre-identified priority triggers as defined in the Intake Form Risk Assessment).

Priority 2—Urgent basic needs for shelter, food, safety *OR* compromised health and well-being (1 or more pre-identified priority triggers as defined in the risk assessment).

Priority 3—No urgent basic needs; no health and well-being triggers; meets criteria for program's specialized services for Disaster Case Management.

Priority 4—No urgent basic needs; no health and well-being triggers

These priority levels determine which cases to assign first, but each case will be evaluated for complexity and urgency of basic needs. If clients are found to be ineligible for DCM, advocacy and referral services may still be provided when:

- The applicant does not meet service criteria
- The applicant cannot be served within a time period acceptable to them
- The applicant's needs fall outside an agency's capacity to serve the client

Client data will be entered into VisionLink, a shared confidential system, or an alternative tool from which data can be exported into VisionLink. This coordinated approach reduces applicant fatigue and provides an accurate history of client recovery and resources provided, allowing stakeholders to collaborate more effectively.

DCM provider organizations will utilize standardized forms for intake, release of information, tracking and reporting that meet FEMA guidelines. The DCM and client will develop a case plan with time-limited tasks for each to complete.

The complexity of the plan and client needs will determine the number of meetings required to meet plan goals. Recovery goals determine the timing of case closures. Progress will be monitored.

Once a case has been opened, services will be provided according to the following standard tiers:

Tier 1 - Stable, housed, emergency needs met, resources not available; case will be closed.

Tier 2 - Guidance, referrals and/or few critical resources needed to achieve recovery goals; monthly contact.

Tier 3 - Limited ability to address disaster-caused needs due to a vulnerability such as the elderly, individuals with disabilities, children, those with literacy challenges, those with limited English proficiency; biweekly contact.

Tier 4 - Severe mental trauma, physical limitation, or a member of the functional needs community who requires intensive support to achieve their recovery plan; weekly contact.

Specific activities that Disaster Recovery Case Management personnel will be doing:

- Provide intake on clients seeking disaster assistance, interview clients to make determination that needs are disaster related. For those with non-disaster related needs, community service referrals will be made. Those with disaster-related needs; case advocates will provide an overview of process and collect necessary information from the client related to their disaster needs which includes Federal and State assistance received. A duplication of benefits check will be completed on each client. Case managers will prioritize the cases and work from highest to lowest priority, based on client availability.
- All clients with disaster-related needs will be assigned a case manager to work with. This manager will help develop individualized recovery plans. These recovery plans will be the foundation of the work done to help disaster victims recover. These plans will be monitored throughout the duration of the client's recovery and altered as needed based on assistance provided.
- A review will be conducted to determine if the recovery plan has been successfully achieved and the individual's needs have been met. The case will then be closed pending no further assistance is needed.
- Provide assistance to review, analyze, make recommendations, and/or negotiate with contractors regarding cost estimates for construction repairs/rebuilds resulting from flood damage. Coordinate activities of volunteers/workers completing repair and reconstruction projects.
- Collect and input client data into VisionLink or similar shared data collection system that can be exported into VisionLink. Through VisionLink case managers will match community resources and client needs to make referrals to access community resources. This collaboration creates a single point of case management data that

provides Long Term Recovery Committees with the information needed to effectively delegate resources and best serve those in need.

- Provide facilitation at community meetings to discuss disaster recovery case management services, seek and collect resources at the local and state level to maintain VisionLink database of resources available to help individuals with recovery, collaborate with other community agencies to share and gather information, and attend training to receive most up-to-date information on disaster case management skills and tools.
- Provide reports to Volunteer Florida on case management services being provided. Collect and report monthly on the number of people being served, number of resource referrals made, number of recovery plan completed, and the status of those still in recovery.

Case closure should occur when client goals have been met to bring about stability and sustainable recovery. While it is the intent and purpose of DCM services to close cases only when needs have been successfully met, there are other reasons identified in the Florida DCM Plan for case closure:

- Timeline needs of client
- Transition of case to social service providers
- By client request
- Non-compliance by client

When a case is closed, written notice will be provided to the client detailing the rationale for termination and closure. Instructions for client appeal will be included. All appeals will be reviewed by the Program Manager. Case closures will be monitored and included in required reports to FEMA.

**C.3 Demobilization:** Demobilization planning shall commence at the onset of the DCM program. Typically, demobilization begins as cases are closed and needs are met and requests for assistance taper off or cease. The plan will include a “rightsizing” model and will review each location separately during the process. Volunteer Florida will coordinate with local service providers and volunteers to maintain awareness of community needs and closure trends that would indicate a demobilization threshold has been met. Should services no longer be warranted prior to the term of the grant, Volunteer Florida may make the decision to discontinue DCM program operations. All demobilization determinations will be made in partnership with FEMA, LTRGs, local governments and the DCM Provider.

**D. Training:** The DCMP training plan will be the responsibility of the Volunteer Florida (Training Special). FLVOAD and its partner agencies will support training efforts as possible. Core elements of DCM program training will include DCMP training, UMCOR DCM training; CAN training, and Export Wizard training, if needed. Training on new best practices, new resources or programs, eligibility changes in existing programs and how to best utilize the tools and

technology available, will be ongoing. Additional training will be conducted as needed for program success.

**E. Staffing:** Funds awarded to Service Provider Organization may only be used for staffing the Disaster Case Management Program. A DCMP Staffing Plan must be submitted with the application and a final copy with any required amendments submitted with the signed contract. DCMP staff may be supplemented through volunteers or additional staff hired at the sole expense of the Service Provider Organization.

**F. Monitoring and Quality Control:** Program monitoring will be the responsibility of Volunteer Florida with assistance from the Program Manager and local DCM staff. Monitoring will include reviews of reports, financial statements and records, case summary and closure reports and site visits. Volunteer Florida will develop policies and procedures and reporting templates to ensure consistent program monitoring and evaluation throughout the grant period. Sub-contract agreements will include requirements for adherence to these monitoring guidelines.

Compliance reviews will focus on the following areas:

- Client intake, recovery plan, referrals, case notes and closure
- Resource coordination between DCM staff and resource providers
- Coordination among DCM, agencies providing resources, government, nongovernment and private sector stakeholders
- Compliance with privacy laws

Volunteer Florida staff will coordinate closely with the FEMA DCM program liaison throughout the program, and will arrange for up to three site visits for FEMA, as requested, throughout the twelve (12) – eighteen (18) month grant term. Volunteer Florida will arrange for any additional requested meetings. Program evaluations will be included in regular reports to FEMA. These reviews will provide the means to identify needed course corrections to ensure program success and to track client progress for reporting outcomes to FEMA.

**G. Reporting:** Monthly Invoice Worksheets and Monthly Program Service Reports shall be submitted to Volunteer Florida no later than the first day of each month utilizing the reporting formats provided.

**H. Technology Platform Description:**

The identified tool for tracking cases is the VisionLink. Service provider organizations may utilize other existing data platforms from which data can be exported to VisionLink for data sharing purposes. All DCM Service Provider Organizations shall receive approval, access and training in VisionLink. VisionLink has been activated for this event and the state will be working with VisionLink to ensure that the portal meets the DCMP reporting requirements.

Following training, Disaster Case Managers and Administrative / Data Entry specialists will be responsible for entering all client data into VisionLink and keeping the system up to date.

Approved users will provide summary information within the dictates of the data sharing agreements on case and program progress for use in DCMP grant reporting requirements and demobilization planning.

DCMP staff may utilize the Google Drive platform, Dropbox, or other similar tools for transmitting reports. No personally protected information will be uploaded into these platforms. Policy regarding the use of these tools will be included in training curriculums.

**I. Functional Needs:** Based on the percentage of people with disabilities and the population numbers for survivors over the age of 60, it is anticipated that some DCM clients will have functional needs, including the possibility of language barriers. DCM offices will be located in ADA compliant facilities; unique services such as translation and other needs will be secured in collaboration with local Coalition for Independent Living Organizations and Centers for Independent Living.