

Q&A Session for RFP #2026-049VF – For Case Management Services and Public
Information & Education for Older Adults

Erie County Department for the Aging – Thursday, October 1st, 2026

*** Any questions submitted via e-mail by 4:00 p.m. EST on Friday October 2nd, 2026,
along with an official response have been included in this document**

Q1: For Schedule B, do we submit the last page, the certificate of liability, or just the third page?

A: The third page will be sufficient. We would discuss the other requirements in Schedule B with an agency if chosen.

Q2: Should Schedule A, B, and any of the other documents be included with the service proposal?

A: Yes, Schedule A, B, HIPPA policy, current W-9, resumes, and other documents of that type should be included with the service proposal. Please see section VII. Proposal Submission in the RFP for details on what should be submitted in the services proposal versus the budget proposal. Schedule E, the budget sheets, should NOT be included with the service proposal

Q3: I was confused about the date range that this is valid for. It says until 2030, but the contract says 1 year with an option of 2. When I'm writing this, I'm trying to figure out the budget.

A: There was a typo which shows two different dates for contract length. Our contracts are typically 3 years, with option of two 1-year extensions. The date for this contract will be February 1st, 2027 – March 31st, 2030, with a potential option of two 1-year extensions.

Q4: When reading the RFP and thinking through what was possible—we run our own database that oversees over 30 places; for tracking purposes, can we use that database?

A: That would depend on the service(s) you are proposing to provide. If you are planning on providing Case Management Services, all information and data must be entered into what is called the Statewide Data System (or Peerplace). The New York State Office for the Aging (NYSOFA), who oversees the local Office's for the Aging, like ours, requires the use of that centralized database. It is a web-based and if an agency were awarded a contract to work on case management services, they would get access and training to utilize Peerplace. If an agency is purely looking to do Public Information & Education, the department will work with you to determine if your current database or tracking system is sufficient and secure for purposes of meeting RFP requirements.

Q5: In the RFP, it states that there's a 100-client caseload that each case manager would have to carry. What would that look like as far as time spent? Typically, we work with 65 clients and with the older population increasing, I'm worried about capacity and whether we could meet that number.

A: Generally, we are looking for a full-time case manager to have case load that hovers around the 100 mark. That doesn't mean that all 100 clients are served at the same time. There are different case monitoring requirements based on the services they receive, and contacts are generally spread throughout the year. See Attachment C for case management monitoring requirements. We do not provide "intensive" case management, but we understand different populations and communities have different intensities and numbers. You may or may not be dealing with a traditional English-speaking caseload. So, it may take more time for those cases, so just make a case for that in your proposal.

Q6: Would referrals be coming from you guys or us, or a combination? Are we doing outreach and connecting it with you? Can we be provided with a full caseload from you without having to look for cases on our own?

A: For case management only, referrals would come from our department in some form. If a client is identified as needing case managed services and they are in an area you are serving, the case may be referred to you. If you are providing case management and Public Information & Education and identify a potential client while doing outreach, the formal client "intake" should come from the department, but the client would most likely be referred to you if you had the capacity. So, yes, the department could provide an agency with a full case load if the agency isn't doing Public Information & Education and is able to serve a larger area that may have enough population in need to make up a full 100-client caseload. There was some discussion earlier on high touch or "intensive" case managed clients. If a client needs intensive case management, they could still receive services through the department or its contractors, but for the services we don't provide, such as housing, those clients should be referred to an agency that can assist. We also encourage people to think beyond their geographic limitations to serve.

Q7: What is the funding amount to ask for?

A: Based on your proposal and the number of staff you identify as needed to perform the services you are proposing, we ask that you take that all into account when figuring out what to put into your budget. The budget document lists things that can be budgeted or billed for. We specifically did not have a maximum award amount published in this RFP as there is a finite amount of funding we receive for the entire system to provide case management services. That amount can fluctuate as those funds are awarded through

grants on the federal and state levels. There is currently \$1.8 Million budgeted for the entire case management system. We are not looking to award a contract to just one entity, but several, especially anyone, even if small, that can serve and reach certain populations like those listed in attachment D. So, while filling out your budget, consider all costs you may incur throughout a three-year period, such as equipment, onboarding, hiring, and anything else you feel is needed to meet the requirements of this RFP. You should not submit a different budget for each of the three years. You can provide reasoning for what you are asking for in the budget narrative that should be included with the budget proposal. Awarded amounts can differ from throughout the contract term for potential reasons, such as agency capacity and need in the area served, funds that are awarded to the department and if they get increased or decreased, the number of new clients entering, etc. We look to bring additional funding to build capacity, but not much. The department and NYSOFA do participate in advocacy efforts to support an increase in the funds used for Case Management and all other services that we provide. Do your best while filling out your budget and if your proposal is being considered but the budget seems off, the committee can ask more questions, or the department may discuss the exact amounts during contract negotiations.

Q8: Are we allowed to pay subcontractors?

A: Subcontractors for such services as payroll, interpretation service, technology maintenance, or some other professional service, can be paid to a subcontractor, but if your agency is looking to subcontract out all the services they are proposing to do, then no.

Q9: Can we use our existing case management software, or does the County require certain software?

A: See question 4.

Q10: Can the case manager and case manager supervisor be the same person, for example, only having one case manager at an organization, or are you looking for organizations that can provide larger teams of case managers?

A: We are looking for any type of proposal that you have. Things that have been done in the past do not necessarily mean they will be done again. There will be a county supervisor who oversees every agency, but your staffing proposal is whatever you believe fits your capacity and population. Our department will typically employ 3-5 case managers, per one supervisor. That supervisor not only oversees case managers and at least one outside agency and is able to maintain a small caseload of their own when needed. But if your proposal is to serve a specific population where only one case manager is needed, it may require more intensive supervision from the County, your proposal would be accepted. We

do not want to set a limitation on how big or small an agency's capacity is or can be. If your proposal doesn't fit with the "traditional" caseload numbers in the RFP, make sure to include reasonings or justifications in your service proposal.

Q11: Can you talk about what reimbursement rates look like; what is allowable/what is not allowable? How does it work, and what is the turnaround time for payments? (We're in 1115, and it's a big concern for cash flow.)

A: We are not Medicaid-funded, so our timelines for re-imbursement are different from that. As far as turnaround time, if invoices are submitted on time and are correctly done, re-imbursements can usually be expected by the following month. That is never a 100% certainty given too many factors to list, especially while working with grants and government, but we do everything we can to help facilitate timely payments.

Q12: Are case management assessments, care plans, etc., determined by the County, or NYSOFA, or would the awardees develop/select their own?

A: NYSOFA has requirements for each of those things. We have a tool in Peerplace and any agency that is chosen to contract for case management services would be trained on all aspects of providing case management, such as administering the client assessment tool that is required by NYSOFA, called the COMPASS, developing person-centered care plans and goals, in addition to the many other screening tools and resources that are required to meet NYSOFA guidelines. You can also refer to Attachment C for more information.

Q13: When do "budget negotiations" take place? We have never had the opportunity for negotiation in our history, as far as I am aware.

A: As part of this RFP, you will all enter proposals, and we will enter negotiations prior to that period. One of the issues with this program is that the funding is the funding; there really isn't much to negotiate. When the committee is reviewing proposals, if they have any questions about the proposal, they will then reach out.

Q14: For proposers submitting for both Option 1 and Option 2, does the 10-page limit apply to the combined proposal or to each option separately? And should a separate Attachment E workbook be submitted for each option? Are indirect or administrative cost rates allowable, and if so, where should they be reflected?

A: If you are doing both, yes, the page limit can be increased to 20 pages. Yes, a separate attachment, please. Allowable, yes, capped at 10% of the overall budget.

Q15: Will the Department provide access to, licensing for, and training on the Department-specific software application, or should proposers budget for these costs?

A: The department has historically provided such required items like these for its contractors at no cost, but if you feel you may want to or can justify any other special licenses that may help you to better provided services, put it in your budget and your budget narrative.

Q16: The \$1.8 million mentioned as available for all WNY—were you referring to both types of contracts, case management and informational services, combined?

A: Yes, that would be referring to all 3 combined and it is for all of Erie County, not the greater WNY area as that would be multiple counties.

Q17: Section V.B requires proof of adequate insurance with the proposal, while Section XII requires proof of Schedule B coverage upon contract execution. Please confirm whether proposers must demonstrate full Schedule B compliance at submission or submit evidence of current coverage, with full compliance required at contracting.

A: Schedule B is our county insurance document. Before contracting, we would discuss how much insurance would be required based on the situation. More in depth after talking with our contract unit.

Q18: Can you speak to the requirements and expectations for Public Information and Education? Specifically, would agencies need to coordinate with the Department regarding content, materials, and branding. Is there flexibility in the educational content/materials?

A: The Department would need to be consulted on content and materials, as they represent Erie County, the Department, NYSOFA and even federal offices. There may be restrictions on what can be put on materials or branding. There also can be things that **MUST** be included when developing content or materials. There will be a department contact to help develop and guide you as to what is acceptable and what is not, but there will be room for flexibility in overall designs. We are looking forward to seeing your creative ideas on how to get information out there.

Q19: Will current contracted agencies get any special consideration? I know the idea is to serve pockets of people who are not being reached. Current contracted agencies may find this to be stressful.

A: We fully anticipated this would be stressful for our current partners. There will be no special consideration given to those involved in programming in the past and proposers will not get any extra points for being a current provider. However, I would recommend using the fact of being familiar with the programs/services as a current provider, as a positive highlight in your proposal.

Q20: Can you tell us who is on the committee?

A: No, that information will not be provided.²

Q21: Thinking about Social Adult Day Care in Erie County Department for the Aging, and how this program is complementary to that service, I am thinking that an agency offering Social Adult Day Care could also have a designated Senior Case Manager under this RFP. Enrolled cases could perhaps include both participants in Social Adult Day Care as well as a broader caseload, with referrals from the County as well as those identified by the agency directly?

A: I would put that in your proposal if that's the vision you have for case management services. It certainly would not be disallowed.

Q22: Option 2 calls for a door-to-door and direct household outreach approach in communities with limited home internet. Does the Department have an expected volume for that, a target number of households or neighborhoods, and can you identify which areas are the priority for door-to-door outreach?

A: We do not have a specific number. Door-to-door is just one example of how to reach that population. I would encourage people to think beyond rural areas where there are coverage issues, but urban areas as well, where there are financial barriers to home internet. Someone wearing a county badge and knocking on neighborhood doors may not get pleasant responses, which is why connecting with agencies that have good relationships in the community is important to us.

Q23: Are startup costs allowed? If so, should they go in the existing Attachment E lines (Equipment under \$1,000, Training, Other), or be identified separately?

A: Startup costs would be under other expenses. Equipment under \$1,000, absolutely put there. We will make sure our contractors have that provided.

Q24: Do we have the County demographics (55+) and associated addresses? This is for the follow-up question for door-to-door.

A: No, we do not have that information. There is publicly available information that includes age and addresses through the Board of Elections. It can be utilized, but not as the only outlet; that is what we are looking for.

Q25: Would you be willing to provide an application checklist within the published Q&A to ensure full clarity on proposal components?

A: It will not be provided. We recommend working through the headings of the RFP to make sure you hit all the required information requested. The RFP has highlighted in multiple

places, items that **MUST** be included with both the services and budget proposals, so please read through the RFP carefully.

Q26: Do you anticipate awarding Option 2 to a single agency county-wide, or multiple agencies by region or population?

A: We do not anticipate just awarding one agency for Option 2 as we are looking for agencies that have roots and trust in the communities that they are proposing to serve or get to hard-to-reach and underserved populations.

Q27: Volume expectations — For Public Information & Education, does the Department have a target number of events or presentations per year, or an anticipated reach (number of older adults served), that proposals should plan around?

A: Since this is a service that has now been separated from case management and we have never done that in the past, we don't have an expectation or targets at this point. I encourage agencies to consider what they can do with their resources. The department would help work with an agency to develop goals and come up with targets and benchmarks to track measurable successes.

Q28: Term clarification — Can you confirm the contract term? The introduction references February 2027 through March 2030, while the Contract section references a one-year term with a one-year extension.

A: Yes, February 1st, 2027–March 31st, 2030.

Q29: How do you want the narrative formatted? Should I make my own headings to make sure I hit on all the needed points?

A: You can format how you like, but that would be helpful for both those reading proposals and for you to make sure you touch on everything asked.

Q30: The RFP says, "Eligible clients typically are aged 60 or older, have a functional impairment in Activities of Daily Living (ADLs) and/or Instrumental ADLs, have limited support to fulfill an unmet need, and are unable to access assistance from any other program such as Medicare or Medicaid. This is not an exhaustive list of criteria, and each potential client will be screened for appropriate eligibility." — Can you confirm clients 55–59 will not be eligible? And can you clarify the screening for appropriate eligibility in conjunction with the County—can you speak to how that will be done?

A: We do serve people under 60 in the form of caregivers. The basic services we provide do have an eligibility requirement of age 60 or older. The screening is done through NY

Connects before they are assigned to a case manager. Eligibility depends on each program and service.

Q31: Are there any additional requirements regarding allowable sources or documentation for contributions used to satisfy the required 10% match?

A: No.

Q32: Are current case managers able to carry a full caseload by relying solely on referrals from the County?

A: Yes, it also has to do with the location that a person has decided to focus on. Some of our agencies receive 14–15 intakes in a week. If your agency can handle covering the entire County and receiving a higher caseload, mention that in your proposal.

Q33: Do you want the agency name, due date, etc., in the subject line?

A: Yes, there are guidelines as to how the proposals are to be labeled and submitted. Please refer to the RFP for the specific requirements.

Q34: For proposers submitting for both Option 1 and Option 2, should a separate Attachment E workbook be submitted for each option?

A: Proposers submitting for both Options 1 and Option 2, should only submit one Attachment E workbook with total budget for both Options.

Q35: Regarding the RFP for Case Management and Public Information & Education Services for Older Adults (specifically Option II, the Public Information & Education Services) is it only available to non-profit agencies to apply or is it also open to consultant firms?

A: Only non-profit agencies may apply.