

City of Madison
Community Development Division
Evaluation of the City of Madison's Older Adult Services and Stakeholder Engagement
Request for Proposals
2022

Summary

The City of Madison's mission is to provide the highest quality service for the common good of our residents and visitors. Among our values are those of Equity and Well-Being. We are committed to fairness, justice, and equal outcomes for all. We are committed to creating a community where all can thrive and feel safe. The City's Vision is to be inclusive, innovative, and thriving.

The City of Madison's Community Development Division is seeking a skilled consultant specialized in racial equity and engagement to evaluate the City's ability to effectively reach a greater number and more diverse group of City of Madison residents age 55 and older. The City currently provides programming and services for older adults at both the Madison Senior Center and through city-funded services provided at non-profit agencies. Through this two part approach the City strives to promote successful aging and independent living. The consultant will evaluate this current two part structure and provide insights on how to better reach and serve all older adults especially those who identify as Black, Indigenous, People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, Queer+ (LGBTQ+), as well as older adults living with low incomes.

Background:

The City's work in supporting older adults has two components. First, the City of Madison has historically awarded approximately \$750,000 in funding to nonprofit agencies serving older adults that supports services aimed at encouraging and assisting healthy independent living. Those services include Case Management, Volunteer Guardianship, Senior Activities, Home Chore Assistance & Community Service Opportunities. Second, the City also owns and operates the Madison Senior Center (MSC) in downtown Madison which provides programs, events, and activities focused on nutrition, wellness and fitness, education, enrichment, community service, and socialization. The goal of these two components is to provide resources that support older adults in their desire to experience stable health and age in place by offering activities proven to maintain high cognitive and physical function, avoid disease and disability, and reduce social isolation.

We know, however, that participation in older adult programs, services, and activities (both those funded by the City at other agencies and those offered at MSC) is underutilized overall, and is underrepresented by BIPOC, and LGBTQ+ individuals as well as those living with low incomes. While

MSC and contracted agencies provide programming and services that are appreciated and valued by those who do attend, participant data shows that we are serving a relatively small number of eligible participants at MSC and that we could be reaching a more diverse group of BIPOC along with low-income and LGBTQ+ populations both at MSC and in city-funded programming.

In 2019, MSC data showed that participants were 88% White, 6% black, 4% Asian and .1% Hispanic and 54% were low-income. Anecdotally, however, we know that many of those participants identifying as BIPOC are UW volunteers. Other than volunteers, there are few BIPOC participants and they often only participate in the nutrition site. 2021 demographic data from city-funded agencies shows a range of diversity with between 79%- 98% of participants identifying as white and 75%-100% as low-income.

We know that adults aged 65+ in Madison are predominantly white (98%). However, more than half (51%) of all BIPOC adults over 65 are low income (200% FPL). This compares to a little more than one-third (37%) of white adults over 65. Additionally, as younger generations age, we know based on local and national trends that this group will become significantly more diverse.

Data is not collected on participants who identify as LGBTQ+. Research suggests that nationally 1-2% of Baby Boomers (born 1946-1964) and Traditionalists (born before 1946) identify as LGBTQ+. This compares nationally to 16% of Generation Z (born 1997-2002). Given national trends and a dramatic increase in self-identification of the younger generation we anticipate the percentage of older adults that identify as LGBTQ+ will continue to grow. Research also shows that LGBTQ+ older adults often face barriers that their cisgender and heterosexual peers do not related to health care, social supports, and financial stability.

Although the older adult population in the City is currently relatively homogenous, the high rates of poverty in the BIPOC community and barriers faced by the LGBTQ+ community suggest that CDD should strive to serve a greater percentage of BIPOC and LGBTQ+ populations in their older adult service array. CDD seeks a consultant who can help inform an updated service array that will be more relevant and accessible for all older adult residents, inclusive, and serve the various needs of this increasingly diverse older adult population.

Scope of Work and Deliverables

The consultant should identify current barriers that older adults face in accessing opportunities that promote successful aging. In particular, the City seeks to better understand what is working well and where shortcomings lie in the current service model for older adults as well as strategies to better reach and serve disproportionately impacted communities, in particular adults 55+ who identify as BIPOC, LBGTQ+, and those living with low incomes.

The evaluator should prioritize gathering feedback from residents, neighborhoods, and other community stakeholders including those who represent and belong to this diverse group of BIPOC and LGBTQ+ older adults. The final product will include specific recommendations for a

framework that promotes successful aging resources for older adults and details a service delivery model designed to reach the aging population in Madison, including individuals who identify as BIPOC, LGBTQ+, and those living with low incomes.

Scope of Work

1. Conduct a community engagement process campaign to:

- Identify activities, events, and resources that fall within the City of Madison's Framework for Senior Activities that are currently provided by community based organizations serving adults age 55+.

For reference, the Framework for Senior Activities follows:

- **Avoiding disease and disability:** Activities may include health screenings, wellness education, home safety modification, nutrition, falls prevention, caregiving, meditation, shamanism, and/or soul calling ceremonies, etc.
- **Maintaining High Cognitive and Physical Function:** Activities may include exercise, recreation, gardening, computer literacy, brain fitness, creative self-expression, health literacy, or healing groups, etc.
- **Engagement with Life:** Activities may include spirituality, field trips, social relationships, friendship development, advocacy, or intergenerational activities, etc.

- Evaluate the level of community awareness of and community engagement in healthy aging resources offered. Include the perspectives of BIPOC, LGBTQ+, and low income seniors.
- Learn what successful aging programs, services, and activities older adults desire. Explain whether these desires differ for BIPOC, LGBTQ+, and low income seniors and identify how.
 - Understand the barriers and challenges faced by older adults in accessing needed and wanted programs, activities and services. Include the perspective of BIPOC, LGBTQ+, and low income older adults.

2. Explore and Provide Recommendations on the following:

- Experiences and best practices from other communities regarding successful strategies for serving diverse older adult populations.
- Strengths and weaknesses in how current agencies serve their community through a diversity, equity, and inclusion lens.
- The geographic distribution of Madison's older adult population including BIPOC, LGBTQ+ and low income seniors, and, based on its results, evaluate the effectiveness of serving these target populations older adults, especially the

target population of BIPOC, LGBTQ+, and low-income seniors, from Madison Senior Center's current location.

- Why current services for older adults funded and provided by the City struggle to attract a greater number of eligible and diverse participants.
- What programs, activities and services, outside of affordable housing, food security, and health services, are most needed and of interest to older adults including those who identify as BIPOC, LGBTQ+, and those experiencing low incomes.
- What strategies could attract older adults age 55+, including BIPOC, LGBTQ+, and those living with low incomes to utilize resources aimed at helping older adults maintain their independent living status.
- Why MSC struggles to attract participants
- What is the future role of the MSC in serving older adults and how could we best serve those who identify as BIPOC, LGBTQ+ and those living with low incomes.

Deliverables

1. A comprehensive report of the community engagement process detailing overall findings and recommendations covering the areas described in the scope of work.
2. An asset map of available services for older adults in Madison to understand how the work of the Madison Senior Center fits into the landscape of healthy aging resources. Highlight community resources that specifically target BIPOC, Low income and LGBTQ+ populations. Indicate areas where the Madison Senior Center may be duplicating other services and where there are gaps the Center could help fill.
3. Identify other potential, or proven, approaches to meet the highest needs of Madison's most vulnerable older adults and whether they are compatible with existing financial and staffing resources available at the Center. Recommend a list of strategies for effective implementation.

Strong proposals will:

1. Identify key personnel who will be assigned to the project, the specific role of each Individual, and a summary of their relevant work experience.
2. Provide an explanation of the firm's objectives.
3. Provide a work plan describing methodologies, approaches, and roles and responsibilities for how the work will be accomplished.
4. Provide a detailed timeline to complete the project with specific steps and work products.

5. Provide a list of required information needed by the firm from Madison Senior Center to perform the requested services.
6. Demonstrate your firm's capability and evidence of your experience providing services equal to or greater in scope than those requested in this RFP. Provide a statement of the length of time you have been in business supplying the services referenced herein and experience in serving governmental entities.

Budget

We have a budget of \$75,000.00 for this project and ask that you submit your fees and payment term estimate within that threshold in order to be considered.

Bid Criteria

Qualifications, Experience, and References

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses in this section to not more than seven (7) pages.

A. Qualifications

1. Describe briefly your firm's background and history. Describe the project team's relevant experience, particularly in projects of similar size and scope, and those involving engagement with diverse communities.
2. Identify key staff (names and titles) and affiliates who would be directly responsible for the various aspects of the contract, if awarded. Identify who the contract manager would be (Cannot be from affiliate).
3. Provide resumes of all staff proposed to be involved in this project. This should include their proposed roles and estimated amounts of time to be spent on this project. A principal or partner-level individual shall be the contact provided for all service and billing issues. Include a brief statement of the availability of key assigned personnel of the team. Resumes will not count against your page limit.
4. List of affiliates, partners and sub-contractors who would be involved in the execution of the contract, if any. For each subcontractor, include names and contact information.
5. Discuss your firm's capabilities and experience in terms of providing services comparable in scope to those described in this RFP. Indicate how services will be provided, i.e. in person, over a virtual platform or a hybrid approach.

B. Project Approach

Responses must be in the same sequence and identified with the corresponding question number (Example: Question 1, Question 2, etc.). Please limit responses in this section to not more than ten (10) pages.

The City will evaluate the proposer's understanding of and ability to meet project requirements as defined in, "Scope of Services."

1. Submit a detailed work plan that outlines the proposed steps and project timeline for completing each of the tasks included in the scope of services. The work plan should be organized by key tasks to be performed. Possible tasks could include, but are not limited to:

- a. Developing and Conducting Surveys
- b. Identifying and Engaging Focus Groups
- c. Interviews
- d. Reviewing existing senior center data, policies and procedures
- e. Conferences
- f. Preparing Asset Map
- g. Include plan for periodic check-ins with City staff/project manager during course of project

2. Describe why the firm's approach fits this particular program.

3. Indicate any information or data that will need to be provided by the City of Madison. Describe expected use of City resources including assistance from City Staff.

C. References – this part will not count against your page limit.

1. Provide a summary of all relevant experience in the last five years.

2. List any and all relevant contracts your firm has done for the public sector within the past five years.

3. References. Proposers must include in their proposals a list of not more than ten organizations from recent projects, similar in size and scope, which can be used as references. Selected organizations may be contacted to determine the quality of work performed and personnel assigned to the project. Provide the following information for each client reference

- Client (contact person, address, and telephone numbers)
- Contract period, Year completed
- A description of the performed work
- Total cost

4. Do you foresee any factors that could affect or delay the completion of this project? If yes, what can be done to reduce these factors?

Cost Proposal

1. Format for Submitting Cost Proposals: Prepare the fee proposal as all inclusive, not-to-exceed, fixed fees:

- The price proposal must contain all pricing information relative to providing the services described in the RFP. The total all-inclusive maximum price proposed is to contain all costs.
- Fixed Price Period – All prices, costs, and conditions outlined in the proposal shall remain fixed and valid for acceptance for a minimum of 120 days starting on the due date for proposal. Proposals shall be quoted as a not-to-exceed cost for services. Fees quoted should include all necessary expenses including but not limited to: travel, telephone,

copying and other out-of-pocket expenses. The final work plan details and cost, not to exceed \$75,000.00, may be negotiated following selection of the consultant.

2. Submit fee and reimbursable expense schedules necessary to accomplish the scope of services identified above. The fee submittal shall address the following items:

- a. A proposed lump sum cost to provide the Scope of Services for this study and an itemized cost breakdown for each task and associated deliverables.
- b. Hourly rate schedule by personnel and the proposed number of hours budgeted for each member of the Consultant firm/team organized by task/phase of project.
- c. Include the respective percentage of sub-consultants' involvement, if any, in each phase of work.
- d. Costs proposed shall be inclusive of all costs related to completing the project, including but not limited to preparation, travel, communication, reproduction, labor, overhead, etc.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Qualifications
Consultant overall background and prior experience in relation to scope of service detailed within this RFP document (20%).
- Project Team & Approach
Comprehensiveness and methodology/approach of proposed work plan (20%).
- **Timeliness** and implementation (10%).
- References and background check, i.e. prior satisfied clients (15%).
- Local vendor preference (5%).
- Proposed cost consideration (30%).