



**STATE OF WASHINGTON
DEPARTMENT OF SOCIAL AND HEALTH SERVICES
PO Box 45811, Olympia WA 98504-5811**

DATE: October 16, 2025

TO: RFP #2434-867 – Financial Management Services Vendor for WA Cares Trust Fund

FROM: James O'Brien, Solicitation Coordinator
DSHS Central Contracts and Legal Services

SUBJECT: Amendment No. 1 – Bidder Conference Questions and Answers.

DSHS amends RFP #2434-867 to provide guidance and answers to the questions received at the Bidder Conference held on October 14, 2025, and to provide the presentation that was given during the Bidder Conference.

Oral Evaluations will be held on Tuesday, November 18, 2025.

Questions received before Bidder Conference:

Question #1: Of the 19 services needed, how will DSHS handle pass-through claims?

A: DSHS currently has a vendor that handles personal care services. All other services will be contracted by WA Cares and the contracted providers will use ProviderOne to claim for services.

Question #2: What is the anticipated cost and use for the services requested? The fee available for this benefit is around \$15,000 to \$36,000.

A: In a similar program there are about 400 participants in two counties. There are about 30 to 40 online purchases a month out of these 400 participants. Reimbursements count for about 20% of the 400. Transportation is a high-volume service. DSHS can reimburse for transportation services such as Lyft, Uber, taxis, and bus passes.

Question #3: Does the transportation include a per mile reimbursement?

A: Yes. Mileage will be reimbursed at the prevailing federal mileage rate. If the federal mileage rate is to the second decimal point it will be rounded down.

Question #4: Is this a sole provider award or are you planning to award to multiple vendors?

A: This is a sole provider award.

Attendees at the October 14, 2025 Bidder Conference included the following:

1. James O'Brien, DSHS
2. Mark Towers, DSHS
3. Katie Kelnhofer, DSHS
4. Maggie Huether and Monica McKinney, Palco, Inc.
5. Kathleen Dougherty and Pearl Barnett, GT Independence
6. Coco Ballew and Adam Jacobs, CDCN

All other terms and conditions in this Solicitation remain the same.

Welcome to the Bidder Conference

***WA Cares Request for Proposals
#2434-867***

***Financial Management Services
Vendor for WA Cares Trust Fund***

***October 14, 2025
2:00 to 3:30 p.m. Pacific Time
via Microsoft Teams***

Agenda

- Introductions and Ground Rules
- Opening Remarks
- Project Scope and RFP Goals
- Important Reminders & Key Dates
- Q&A

Introductions and Ground Rules

- DSHS Introductions
- Presentation, followed by Q&A
 - Please hold questions until end
 - Questions must be sent to the RFP Coordinator via Chat
- List of attendees may become a public record
- Focus on general issues related to RFP instructions, requirements, etc.
- Verbal responses to questions are unofficial
- Official responses to be posted as an RFP amendment

Procurement Goals

- Fair, open and competitive procurement process
- DSHS is a public entity and subject to state procurement rules and regulations
- To obtain the services of a qualified organization(s), who will collaborate with DSHS, WA Cares to provide Financial Management Services as requested in the RFP.

Background

Program timeline

2014

Research on
policy options
for long-term
care

2019

Legislature
passes LTSS
Trust Act &
governor
signs into law

2021

Legislature
improves
coverage for
adults with
disabilities that
onset prior to
age 18

2022

Legislature
adds pathway
to partial
benefits for
near-retirees;
establishes
voluntary
exemptions for
certain groups

2023

July 1
Workers begin
contributing

2024

Legislature
gives workers
the ability to
take their
benefit out of
state

2026

July 1
Benefits become
available for
qualified, eligible
individuals

Background

Key program details per current statute (RCW 50B.04):

- **Premium rate** - \$0.58 cents for every \$100 earned
- **Lifetime benefit maximum** –\$36,500, adjusted annually up to inflation, paid directly to providers
- **Three pathways to qualified individual status**
 - Contribute 10 years
 - Contribute 3 of the last 6 years from the date of application for benefits
 - For near-retirees (born before 1968): contribute at least one year, earning one-tenth of the lifetime benefit amount for each year contributed

A person must work 500 hours during a year to receive credit for a qualifying year
- **Eligible beneficiary**
 - A qualified individual who requires assistance with at least 3 activities of daily living (i.e., bathing, eating, ambulation, medication management, toilet use, transfer, etc.), and their need for assistance is expected to last for at least 90 days
 - You can take your benefit with you if you leave the state

Covered services

- **Adaptive equipment and technology**
- Adult family home services, including respite care
- Assisted living facility, including respite care
- Care transition coordination
- In-home personal care and respite from individual providers (including [paid family caregivers](#))
- Memory care
- Nursing home, including respite care
- **Professional nursing services**, specifically nurse delegation and private duty nursing
- Adult day services, including adult day care and adult day health
- Dementia and behavioral support
- Education and consultation
- **Environmental modification**
- Home-delivered meals
- Home safety evaluations
- In-home personal care and respite with home care agencies
- Personal emergency response system (PERS)
- **Professional nursing services**, specifically skilled nursing
- Services that assist paid and unpaid caregivers, specifically
 - Housework and errands
 - Yardwork and snow removal
- **Transportation**

Project Scope

- Managing all provider tasks associated with WA Cares Fund professional medical providers or other services if needed to achieve provider network adequacy goals.
- Purchasing goods and services online on behalf of the Beneficiary in accordance with WCF policy.
- Processing reimbursement requests and making payments to beneficiaries in accordance with WCF policy and procedures for reimbursement-allowable services.

Bidders' Proposals

- Based on the terms, conditions and deliverables set forth in the RFP and Attachment A: Sample Contract
- Provide clear, concise, direct, detailed and specific responses
- Ensure responses are accurate, without assumptions
- Apparent Successful Bidder's Proposal may become part of the Contract

Submitting a Proposal that does not follow the RFP requirements will be deemed non-responsive



Submission Requirements

Attachment B: Sample Submission Letter

Attachment C: Certifications & Assurances

Attachment D: Bidder Response Form

1. Bidder Information (Administrative Response)
2. Bidder EO 18-03 Certification
3. Bidder Certification – Washington Small Business
4. Bidder Certification – Veteran Owned Business
5. Bidder Qualifications and Experience (Management Response)
6. Bidders Solution to RFP (Technical Response)
7. Bidders Proposed Pricing (Cost Response)

Attachment E: Contractor Inclusion Plan

Important Reminders

- As Amendments are posted to WEBS, these should be carefully reviewed and downloaded by the Bidders
- DSHS is committed to ensuring a fair and open competitive process
- To ensure that all Bidders receive a fair and open opportunity, it is vital that all interested parties abide by the requirements
- **All questions and information regarding this RFP should be directed to the RFP Coordinator and to no one else, unless otherwise directed in writing by the RFP Coordinator**



Bidders may submit written questions or requests for change in Solicitation Requirements until 5:00 p.m. Pacific Time	October 21, 2025
DSHS intends to post responses to written questions	October 27, 2025
Bidders must submit Proposals by 5:00 p.m. Pacific Time	November 3, 2025
Announcement of Apparent Successful Bidder on WEBS	ASAP
Contract Execution/Start Date	February 1, 2026



- Questions must be sent to the RFP Coordinator directly via Chat
- **Verbal responses to questions are unofficial**
- Official responses shall be posted on WEBS as an RFP Amendment
- If there are questions that we do not get to today, please submit these via email to the RFP Coordinator at: **james.obrien2@dshs.wa.gov**

**DSHS appreciates your time and
interest in this solicitation!**