



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

ROY COOPER • Governor  
KODY H. KINSLEY • Secretary  
CHARLES E. INGOLD • Assistant Secretary  
KEN DAHLIN • Director

**Solicitation Addendum**

**Solicitation Number:** 30-23234-DSS

**Solicitation Description:** Success Coach Replication Sites

**Solicitation Opening Date and Time:** February 1, 2024, 2:00 PM Eastern Standard Time

**Addendum Number:** 4

**Addendum Date:** January 25, 2024

**Purchasing Agent:** Natalie Parraghi  
Natalie.parraghi@dhhs.nc.gov

1. RETURN ONE PROPERLY EXECUTED COPY OF THIS ADDENDUM WITH BID RESPONSE OR PRIOR TO THE BID OPENING DATE/TIME LISTED ABOVE.
2. THE SUCCESS COACH REPLICATION SITES RFP 30-23234-DSS IS HEREBY MODIFIED AS FOLLOWS:

**M1. Proposal Opening Date, cover page, is revised and restated as follows:**

Proposal Opening Date: February 1, 2024, at 2:00 PM ET

**M2. Proposals will be publicly opened, page 1, is revised and restated as follows:**

Proposals will be publicly opened: February 1, 2024, at 2:00 PM ET

**M3. Section 2.4 RFP Schedule, page 7, is revised to update dates in the table as follows:**

The table below shows the *intended* schedule for this RFP. The State will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	State	November 16, 2023
Submit Written Questions	Vendor	December 1, 2023, at 2:00 PM ET
Provide Response to Questions	State	January 25, 2024
Proposal Opening Deadline*	Vendor	February 1, 2024, at 2:00 PM ET
Contract Award	State	April 1, 2024

**M4. Section 4.5 VENDOR EXPERIENCE, is revised and restated as follows:**

In its Proposal, Vendor shall, ensure success coach case workers and supervisors possess at minimum a bachelor's degree in social work or related field. Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the State. Vendor shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

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**M5. Section 5.2 SPECIFICATION, is revised to re-letter subsections i) and j) to j) and k), respectively, and to add the following after subsection h:**

- i) Create a partnership with the DSS's in the region and make/create a referral form or use one provided by Catawba County for social worker to complete and send to post care provider. Vendor will want to have regular contact with DSS agencies and Vendor can explore creating a MOU with local DSS.

**M6. Section 5.2 SPECIFICATIONS, subsection k6 (*previously subsection j6 in the original RFP*), is revised and restated as follows:**

Crisis Intervention and Management: Help families in crisis set priorities and effectively weather the crisis by providing support, education, referrals or other services. Help the family establish healthy boundaries and anticipate, plan for, and prevent crises by developing and using plans of action taking into account the family's unique culture, dynamics, trauma history and experiences. "Crisis" is defined as a crucial point in the family's life when assistance is needed; an emotionally stressful situation, traumatic event, or high tension situation that impacts the caregiver's ability to function. Families need to be contacted back within 24-hours for crises intervention and management.

**M7. ATTACHMENT A: PRICING FORM** is revised and replaced in its entirety as follows:

## **ATTACHMENT A: PRICING FORM**

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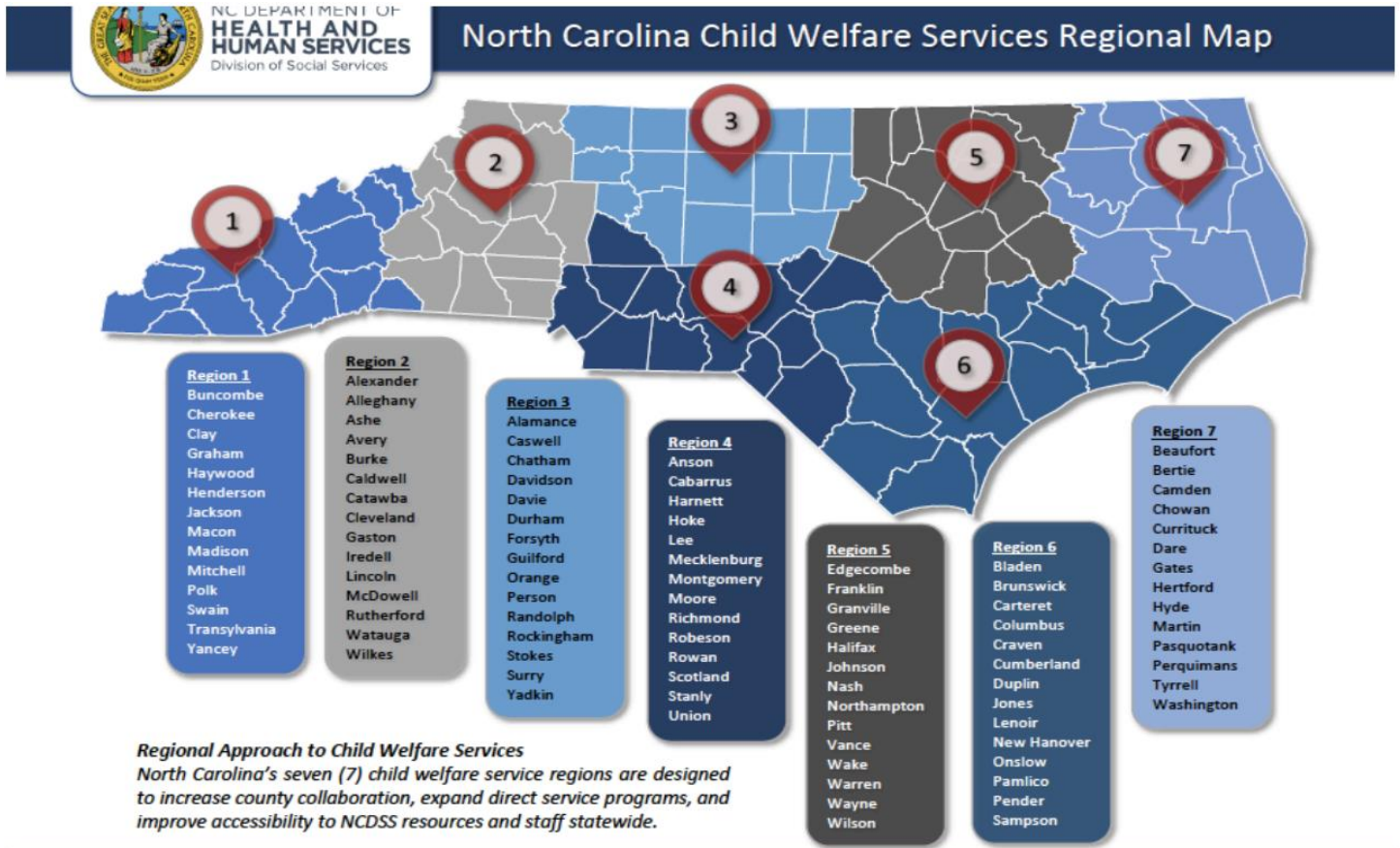
*Travel Expenses – Any travel expenses reimbursement will be at the rates set forth in N.C.G.S. §138-6; as amended from time to time. ([https://www.ncleg.gov/EnactedLegislation/Statutes/HTML/BySection/Chapter\\_138/GS\\_138-6.html](https://www.ncleg.gov/EnactedLegislation/Statutes/HTML/BySection/Chapter_138/GS_138-6.html))*

### **Vendor Instructions:**

- A) Complete the attached Cost Tables located in separate Microsoft Excel workbooks titled “Cost Tables Region [#] - 30-23234-DSS - Success Coach Replication Sites”.
- B) There are seven (7) separate MS Excel workbooks—one (1) for each Region. Vendor must complete and submit the applicable workbook(s) for the Region(s) they are proposing.
- C) Each workbook has three (3) worksheets (tabs): one (1) for the Initial 3-year term, one (1) for the first optional 1-year renewal period, and one (1) for the second optional 1-year renewal period. Vendor must complete all worksheets.
- D) Travel costs are included in the Cost Tables for Vendors to propose their estimated travel costs. Travel expenses will only be reimbursed at the rates set forth in N.C.G.S. §138-6; as amended from time to time.

**M8. ATTACHMENT H: REGION MAP IS REVISED AND REPLACED IN ITS ENTIRETY AS FOLLOWS:**

**ATTACHMENT H: REGION MAP**



The image above can be located at the following link for reference purposes only:

<https://www.ncdhhs.gov/cws772022a1/download?attachment>

**Please mark which regions:**

- ☐ Regions 1-7
- ☐ Region 1
- ☐ Region 2
- ☐ Region 3
- ☐ Region 4
- ☐ Region 5
- ☐ Region 6
- ☐ Region 7

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**3. THE FOLLOWING ARE QUESTIONS RECEIVED FOR THE SOLICITATION AND THE STATE'S RESPONSE TO THE QUESTIONS.**

<b>Q #</b>	<b>DOCUMENT SECTION</b>	<b>VENDOR QUESTION</b>	<b>RESPONSE</b>
1.	<b>2.4 RFP SCHEDULE, Page 7</b>	I see that the "Proposal Opening Deadline" is listed as December 6th, 2023. Is that when all proposals are due or is that the date the proposals can begin being submitted on a rolling basis?	The Proposal Opening Deadline has been extended to February 1, 2024, at 2:00 PM Eastern Time in accordance with revisions <i>M1</i> , <i>M2</i> , and <i>M3</i> in this solicitation Addendum above.  ALL Vendor proposals are due no later than this deadline. Please see RFP Section 2.6 Proposal Submittal for more information.
2.	<b>2.4 RFP SCHEDULE, Page 7</b>	What is the purpose of the Microsoft Teams link at time RFP is opening due? Are we expected to submit and present our proposal?	The Microsoft Teams link provided in RFP Section 2.4 is where the public bid opening will be held. At the proposal opening deadline, the names of all Vendors that submitted a timely proposal response to the solicitation will be read aloud by NC DHHS. Prices will not be discussed at the public bid opening. Vendors will not present their proposals at the public bid opening. Vendor attendance at the public bid opening is optional and will not impact evaluations.
3.	<b>General (See 2.6 PROPOSAL SUBMITTAL, Pages 7-8)</b>	What's the best method to submit the Proposal?	Vendor's proposals for this procurement <b>must</b> be submitted through the Sourcing Tool.  Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440, Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM EST to 5:00 PM EST.  See RFP Section 2.6 Proposal Submittal for more information regarding submission of Vendor Proposals.
4.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What data systems will be used?	Data systems will not be used. This is not an IT solicitation. Catawba County DSS will share during training the appropriate reports and documentation that will be used for services.
5.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	Is the fidelity measure built into the system?	Data systems will not be used. This is not an IT solicitation. Catawba County DSS will share during training the appropriate measures to report on.
6.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	Will agencies be able to access program data from the data system?	See above Response to Vendor Question 4.

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<b>Q #</b>	<b>DOCUMENT SECTION</b>	<b>VENDOR QUESTION</b>	<b>RESPONSE</b>
7.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What is the minimum level of education and experience required for a success coach?	See revised RFP Section 4.5 VENDOR EXPERIENCE in <i>M4</i> above for details.  Staff and supervisors providing Success Coach must have at minimum a bachelor's degree in social work or related field. This does not include administrative or financial staff.
8.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What is the minimum level of education and experience required for a program supervisor?	See revised RFP Section 4.5 VENDOR EXPERIENCE in <i>M4</i> above for details.  Staff and supervisors providing Success Coach must have at minimum a bachelor's degree in social work or related field. This does not include administrative or financial staff.
9.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What are the minimum staffing requirements per region?	The max caseload is 15 families: 1 Success Coach and the Success Coach to supervisor ratio is 5:1.  Things to factor into the caseload are the needs of the family and how far the Success Coach is traveling.
10.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What is the projected number of annual referrals per region?	That is dependent on the # of children who exit care. It is Catawba County's experience that approximately 50% of families offered the service accept. Though data is not readily available of how many kids exit foster care in each county and to what permanency type to estimate this. Historically in SFY 2022, there were 600 families that received post adoption services statewide. These services were for post adoption only, however, this RFP also includes families that exit through guardianship and reunification.  In addition, we have families who have adopted many years before contacting the agency seeking services, so it is not just families who have recently achieved permanency.  The Cost Tables in Attachment A Pricing Form have been updated (see revision <i>M7</i> in this addendum above) to include a quantity of NTE 1 FTE program supervisor per region and NTE 8 FTE Success Coach Case Workers per region. Each case worker can serve up to 15 families.
11.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What is the minimum number of success coaches per region?	See above Response to Vendor Question 10. The number of success coaches that will be required per region may vary. The State has updated the Cost Tables in the Pricing Form with an estimated quantity of not-to-exceed (NTE) 8 FTE Success Coach Case Workers per region.



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<b>Q #</b>	<b>DOCUMENT SECTION</b>	<b>VENDOR QUESTION</b>	<b>RESPONSE</b>
12.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	What are projected caseload sizes per region?	See above Response to Vendor Question 10.
13.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	Can one program supervisor/liaison supervise multiple regions?	Yes
14.	<b>5.0 SPECIFICATIONS AND SCOPE OF WORK, Pages 13-16</b>	Will the required training be facilitated in-person or virtually?	Combination of both
15.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Can additional rows be added to the cost table to specify costs not outlined by the current deliverables?	Yes
16.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Should the cost of the 3-day Success coach training be included in the requested funds through the RFP or will the state be covering the cost?	There is no cost imposed to vendors for the 3-day training. Vendors will be reimbursed for travel.
17.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Where in the cost table should mileage and overnight travel be entered?	A line item for Travel has been added to the Cost Tables for Vendors to propose their estimated travel costs—see revision <i>M7</i> in this addendum above.  Travel expenses will only be reimbursed at the rates set forth in N.C.G.S. §138-6; as amended from time to time.
18.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Can indirect costs be included in the proposal? If so, is it at the federal approved indirect cost rate? If so, where should it be entered in the cost table?	Yes. Additional rows can be added if needed.  The Cost Tables in the Pricing Form have been updated—see revision <i>M7</i> in this addendum above
19.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Can additional staff be added to the pricing form? If so, can rows be added to the cost table?	Yes. Additional rows can be added if needed.  The Cost Tables in the Pricing Form have been updated—see revision <i>M7</i> in this addendum above
20.	<b>ATTACHMENT H: REGION MAP, Page 29</b>	The list of counties by region does not match the color-coded map for each region. Which counties are included in each of the seven regions?	ATTACHMENT H: REGION MAP is updated with revision <i>M8</i> on page 4 of this addendum.  Here is the link to the most updated region map: <a href="https://www.ncdhhs.gov/cws772022a1/download?attachment">https://www.ncdhhs.gov/cws772022a1/download?attachment</a>
21.	<b>1.0 PURPOSE AND BACKGROUND, Page 5</b>	For families after adoption, will services continue to be provided to families with any type of adoption (including international)?	Yes

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<b>Q #</b>	<b>DOCUMENT SECTION</b>	<b>VENDOR QUESTION</b>	<b>RESPONSE</b>
22.	<b>1.0 PURPOSE AND BACKGROUND, Page 5</b>	For families who are reunifying, how will referrals be coordinated with local DSS agencies?	Create a partnership with the DSS's in the region and make/ create a referral form or use one given to you by Catawba County for social worker to complete and send to post care provider. Vendor will want to have regular contact with DSS agencies, and Vendor can explore creating a MOU with local DSS.  Reference revision <i>M5</i> in this addendum above.
23.	<b>1.0 PURPOSE AND BACKGROUND, Page 5</b>	How long after permanency may services be provided? Is there a time limit to access services following reunification or adoption?	No time limit.
24.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	Are services only in-home or can services be provided through tele-health or at the office of the provider if families prefer it?	Services can only be provided in person and in-home. No services can be provided via tele-health or at the office.
25.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	From the Success Coach intervention manual (p 76 of this link: <a href="https://spaulding.org/wp-content/uploads/2022/06/Success-Coach-Services-Program-Manual.pdf">https://spaulding.org/wp-content/uploads/2022/06/Success-Coach-Services-Program-Manual.pdf</a> ), it states that "It will be important for families to build their support networks and find connection in their communities" and gives examples of events such as post-adoption conferences, support groups, and holiday events. Can hosting such events be included in the budget proposal for the current RFP?	Vendor proposals may include optional costs for hosting events. Hosting event fees will require approval by the State prior to the date of the event.  This manual is not part of the RFP. Catawba County DSS will provide the manual during training to the replication sites.
26.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	In the same intervention manual [referenced in above question #25] (p 68), it says Success Coaches will be trained in various interventions in the Family-Centered Practice in Preservation Programs Training and DECA/DESSA training. Also, see Appendix E and F for a list of interventions that can be used with families." This document does not contain an Appendix E or F, please provide a list of any specific interventions that can be used within the Success Coach framework.	This manual is not part of the RFP. Catawba County DSS will provide the manual during training to the replication sites.
27.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	For clients who have experienced trauma, can trauma-focused therapy models (e.g., Trauma Focused-Cognitive Behavioral Therapy or Attachment, Regulation, and Competency) be provided within the success coach framework?	Success Coach is not a clinical modality, so TF-CBT would not fit, though skills from ARC could be beneficial for families. Specific clinical modalities could be used with families by the child, or family therapist that is involved with the client. Success Coaches provide enhanced case management.



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28.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	For the success coach model interventions that target specific skills (e.g., parenting), what evidence-based models are being used to provide these skills?	Skills will be taught during the training to the replication sites provided by Catawba County DSS.
29.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	Does the current model allow for group support for parents and/or children? Using best practices of peer support, can we contract with a parent with lived experience to lead these support groups?	Catawba County DSS will provide training on the use of the Success Coach Model.
30.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	The model is described as requiring a frequency of visits that is “at least monthly (p 5)”- what about families who need weekly counseling?	This is not stated in the RFP. Catawba County DSS will provide training on the use of the Success Coach Model.
31.	<b>5.2 SPECIFICATIONS, subsection j), Page 15</b>	For the crisis response services, what is the timeframe for response? Are coaches expected to be on call outside of business hours?	Families need to be contacted back within 24 hours. We do have an on-call person for any crisis, though these calls are rare. Reference revision <i>M6</i> in this addendum above.
32.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	Why is no budget range provided? Can one be provided?	The State does not release this information.
33.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	How much does the required training cost?	Purchase costs are located on RFP pages 15-16 (Section 5.3). The cost of the training on the Success Coach Model provided by Catawba County DSS is not imposed on vendors.
34.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	The larger regions will result in considerable travel for employees. How can we include the travel costs of home visiting on the pricing form?	A line item for Travel has been added to the Cost Tables for Vendors to propose their estimated travel costs—see revision <i>M7</i> in this addendum above.  Travel expenses will only be reimbursed at the rates set forth in N.C.G.S. §138-6; as amended from time to time.
35.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	What is a reasonable estimate of families served by this intervention per year? What is an estimate of required success coach case workers that would be required based on the pilot program from Catawba County?	See above Responses to Vendor Questions 10 and 11. See also revision <i>M7</i> in this addendum above regarding updated Cost Tables in Attachment A: Pricing Form.
36.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	How can we include staff/administrators that are essential for operating the program (other than success coaches and supervisors, for example, finance department staff who prepare required invoices and data evaluators to submit the required program evaluation described in section 5.3 h) on the pricing form?	Add additional rows, if needed.  The Cost Tables in the Pricing Form have been updated—see revision <i>M7</i> in this addendum above
37.	<b>General</b>	Is there an anticipated budget per region?	The State does not release this information.

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<b>Q #</b>	<b>DOCUMENT SECTION</b>	<b>VENDOR QUESTION</b>	<b>RESPONSE</b>
38.	<b>General</b>	Is there a projected number of families to be served per region?	See above Response to Vendor Question 10.
39.	<b>General</b>	What is the training costing the provider will need to incur? It states the licenses and tools dollar amounts needed; 3-day training conducted by Catawba County Success Coach team is referenced. Is there a cost for this piece?	Purchase costs are located on RFP pages 15-16 (Section 5.3). The cost of the 3-day training on the Success Coach Model provided by Catawba County DSS is not imposed on vendors.
40.	<b>ATTACHMENT A: PRICING FORM, Pages 21-22</b>	What's your suggestion for completing this? Is the price exclusive to the 3 Day training alone?	The Cost Tables in the Pricing Form have been updated—see revision <i>M7</i> in this addendum above.  The cost of the training on the Success Coach Model provided by Catawba County DSS is not imposed on vendors.

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**Failure to acknowledge receipt of this addendum may result in rejection of the response.**

**Check ONE of the following options:**

- ☐ Bid has not been mailed. Any changes resulting from this addendum are included in our bid response.
- ☐ Bid has been mailed. No changes resulted from this addendum.
- ☐ Bid has been mailed. Changes resulting from this addendum are as follows:

**Execute Addendum:**

**Offeror:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Name and Title (Typed):** \_\_\_\_\_

**Date:** \_\_\_\_\_