



438 Main Street, Suite 1200
Buffalo, NY 14202

REQUEST FOR PROPOSAL

Attorney for Supplemental Needs Trust: Eligibility and Medicaid Laws

April 8, 2019

Proprietary and Confidential

BACKGROUND:

The WNY Coalition Pooled Trusts is a type of Supplemental Needs Trust (SNT). An SNT is a vehicle that can be used to enhance the quality of life for individuals with disabling conditions. The SNT must be used for the benefit of an individual with a disabling condition and the expenditures made on behalf of that person should supplement, not replace, their government benefits.

Our Pooled Trust is made up of three trustees: Center for Elder Law & Justice, People Inc. and Key Bank. Center for Elder Law & Justice is a private non-profit that was established in 1978 that provides FREE civil legal services to the elderly, disabled, and low income individuals in WNY. People Inc. is Western New York's leading non-profit human services agency that provides a variety of services including but not limited to; residential, employment, community outreach, health care, and recreation programs. They help families and people with disabilities, as well as seniors, live more healthy, independent and productive lives. Key Bank is the Fiscal Trustee that handles the management of funds and assets.

The purpose of a Pooled Trust is protect individual's government benefits, such as Medicaid and Supplemental Security Income (SSI), from a financial standpoint. Individuals deposit funds to remain below the income and/or resource guidelines provided by Medicaid and SSI. Individuals are given the opportunity to continue to receive their Social Security and Medicaid Benefits as well as having access to the money deposited. The goal of the WNY Coalition Pooled Trusts is to allow individuals to remain at home within the community, maintain quality of life, receive quality care, and retain dignity.

Within our pooled trust, beneficiaries pool their money together to take advantage of better investment opportunities. We administer three types of trusts within the Western New York Coalition: the Self-Funded Trust for individuals under the age of 65, the Self-Funded Trust for individuals over the age of 65, and the Friends and Family Trust. For more information of the WNY Coalition Pooled Trusts visit <http://www.wnypooledtrust.org/>.

SCOPE:

The WNY Coalition Pooled trusts has approximately 650 clients and continues to grow. The trustees are seeking an attorney to assist with specific legal issues.

Number of hours will be determined by hourly rate and available funding. Services that will be provided include, but are not limited to, the following tasks:

1. Work with the trustees to determine whether a person is eligible to use a pooled trust.
2. Determine whether or not certain payment can be paid using...
3. Prepare reports

As a part of this RFP process, communication and proposal submissions should be directed to:

Name	Karen Nicolson, CEO, CELJ
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Address	438 Main Street, Suite 1200, Buffalo, New York 14202
FAX	716-856-5317
Email	knicolson@elderjsuticeny.org

Inquiries about the position, application, or process must be made in writing and will be responded to in a written format within 72 hours of the receipt of the request.

DUE DATE:

All proposals are due by 5pm on Monday, May 6, 2019. Any proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Proposals may be mailed, emailed or hand-delivered. Any late proposals will not be evaluated for award.

SCHEDULE OF EVENTS:

Event	Date
1. RFP Distribution to Professionals	April 8, 2019
2. Proposal Due Date	May 6, 2019
3. Award and schedule introductory meeting	No later than May 20, 2018

PROPOSAL SUBMISSION:

Award of the contract resulting from this RFP will be based upon the most responsive applicant whose offer will be the most advantageous to the WNY Coalition Pooled Trusts in terms of cost, experience, functionality, and other factors.

The trustees reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential applicant;
- Accept other than the lowest priced offer;
- Award a contract on the basis of initial offers received, without discussions or requests for best and final offers; and
- Award more than one contract.

Applicant's proposal shall be submitted in several parts as set forth below. The applicant will confine its submission to those matters sufficient to define its proposal and to provide an adequate basis for the trustees of the WNY Coalition Pooled Trust to evaluate the proposal.

PROPOSAL:

Applicant's proposal in response to this RFP will be incorporated into the final agreement between CELJ and the selected applicant (s). The submitted proposals should include each of the following sections:

1. Brief Summary of Work Experience (no more than one page)
2. Resume
3. Hourly Rate for Services & Availability
4. References

The detailed requirements for each of the above-mentioned sections are outlined below.

SUMMARY OF WORK EXPERIENCE & RESUME:

Provide an overview of your prior and current work as an attorney working with Medicaid, including number of years of experience and any history of cases. Affirm that the applicant has never been convicted of a felony. Please also attach a resume.

HOURLY RATE FOR SERVICES:

Please provide your hourly rate for services, as well as your availability (number of hours per week or month that you are available for part-time work).

REFERENCES:

Provide three professional references.