

PROCESS FOR VENDOR OR CONTRACTOR SELECTION AND CONTRACTING

Use the process below to outline each step, from identifying vendors/contractors to approving them for service.

Stage	Steps
1. Identify potential vendors/contractors	<ul style="list-style-type: none"> <input type="checkbox"/> Identify potential vendors: Contact leading PACE organizations to request recommendations for national companies that other PACE organizations use, as well as conduct an internet search for national or local providers <input type="checkbox"/> Develop criteria to choose candidates: qualifications, quality of service, experience with elderly, ability to expand with PACE needs, pricing, local vs. national companies, etc.
2. Request information from potential vendors/contractors	<ul style="list-style-type: none"> <input type="checkbox"/> Company background and overview, including size, year founded, leadership, affiliations, etc. <input type="checkbox"/> Human Resources Policies, such as company training and recruitment, turnover statistics, safety, staff development, process for background checks, and other relevant HR processes <input type="checkbox"/> Copy of licensures and certifications <input type="checkbox"/> Description of vendor's experience with older adult populations <input type="checkbox"/> Any lawsuits or other actions against the company <input type="checkbox"/> Customer experience scores (patients or healthcare organizations, etc.) <input type="checkbox"/> Plan for backup personnel or vehicles in case of emergency <input type="checkbox"/> Plan for personnel continuity and backup to address staff turnover <input type="checkbox"/> Schedule of regular reports on their activity <input type="checkbox"/> List of other customers and contact information for references <input type="checkbox"/> Review of Contractor Responsibility Policy and response to whether all requirements can be met <input type="checkbox"/> Other items specific to each vendor (e.g., menus for food vendors) <input type="checkbox"/> Conduct interviews with leadership of top three options, using a structured interview where possible for objective comparison <input type="checkbox"/> Choose the best fit for the organization

Stage	Steps
3. Contracting and negotiations	<ul style="list-style-type: none"><input type="checkbox"/> Negotiate required services and conditions<input type="checkbox"/> Use templates for Subcontractor Agreement<input type="checkbox"/> Ensure that a Quality Improvement Plan is included in the contract, since health departments may want to see how contractors attend service training
4. Receive contract approval by state health department	<ul style="list-style-type: none"><input type="checkbox"/> Check with the state reviewer on what approvals are needed: Subcontracting agreements with Transportation and Meal Service Companies sometimes should be reviewed and approved by the state's health department prior to execution.<input type="checkbox"/> Conduct training<input type="checkbox"/> Go live<input type="checkbox"/> Establish ongoing Contract/Performance reviews as set by policies