

EXECUTIVE SUMMARY

Recommendation for Additional Spending Authority 17-005V – Occupational and Physical Therapy Services

Introduction

Responsible: Procurement & Warehousing Services (PWS)

This request is to approve the recommendation to increase spending authority for Request for Proposal (RFP) 17-005V – Occupational and Physical Therapy Services from July 1, 2016 through June 30, 2019. This RFP was issued to provide services for students who qualify as Exceptional Student Learning Support Department (ESLS) Occupational and Physical Therapy services (OT/PT) under the Individuals with Disabilities Education Act (IDEA) and Individuals with the Disabilities Improvement Act of 2004 (IDIA) and any other students identified by the District staff or as required by legislature.

Goods/Services Description

Responsible: Exceptional Student Learning Support (ESLS)

Occupational therapy provides therapy for those recuperating from a physical or mental illness that encourages rehabilitation through the performance of activities required by daily life. Physical therapy provides treatment of disease, injury, or deformity by physical methods such as massage, heat treatment, and exercise rather than by drugs or surgery. OT/PT services will include, but not be limited to, small group or individual therapy with students, evaluations, supervising assistants and aids, record keeping for student attendance, progress reports and therapy notes, individual education plan development, attending in-service meetings as required, and providing consultation with parents, school, and staff.

Awarded vendors are provided their school and student assignments at the start of the school year as well as throughout the year as new students are identified for these services. Placement is based on several factors including, areas of expertise, level of experience with special populations (ASD, Ind.), geographical location, and ability to provide personnel as well as vendor cost. The Curriculum Supervisor and OT/PT Specialists work directly with the awarded vendors regarding placement, delivery of services, and billing. Schools (teacher and ESE Specialist) have direct contact in regard to providing student schedules, location for therapy, and setting up IEP meetings and other services as needed.

The process, for these services during the school year, is a school will receive a request either generated by the school itself or by parental concerns. A therapist is assigned, by the ESLS department, to the school to complete a “tech-assist” similar to the Response to Intervention (RTI) process. If the interventions are not successful, an evaluation is conducted, and based on the eligibility criteria; the student is made eligible for services if the criteria is met.

During the term of RFP 17-005V to date, there has been an increasing trend in the number of students referred for evaluation in the area of Occupational and Physical. During the 2016-2017 School Year (SY), approximately forty (483) referrals were received, during the 2017-2018 SY five hundred and seventeen (517) referrals were received.

The summary below indicates services for both the 2016-2017 SY and the 2017-2018 SY.

	<u>2016-2017 School Year</u>		<u>2017-2018 School Year</u>
2,877	OT/PT Services in District	3,803	OT/PT Services in District
3	Collaboration in Occupational Therapy	29	Collaboration in Occupational Therapy
2	Collaboration in Physical Therapy	18	Collaboration in Physical Therapy
69	Consultation in Occupational Therapy	216	Consultation in Occupational Therapy
22	Consultation in Physical Therapy	52	Consultation in Physical Therapy
2,187	Direct Services Occupational Therapy	2,925	Direct Services Occupational Therapy
594	Direct Services Physical Therapy	563	Direct Services Physical Therapy

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**Procurement Method
Responsible: PWS**

The procurement method chosen is through a competitive solicitation, which is required by School Board Policy 3320, Part II, Rule D and Florida Administrative Code 6A-1.012(7).

**Financial Impact
Responsible: ESLS**

The estimated financial impact to the District will be \$1,960,155. The contract award amount was \$13,000,000. The request is to increase the spending authority by \$1,960,155, bringing the new contract value \$14,960,155. The funding comes from the General Fund and was not requested during the 2018/2019 SY budget development. As such, this impacts and reduces the General Fund. The financial impact represents an estimated contract value; however, the award amount authorized will not exceed the contract award amount.

This contract was awarded with a spending authorization of \$13,000,000 for thirty-six (36) months on July 1, 2016. Procurement & Warehousing Services has issued purchase orders in the amount of \$11,540,691 to date. This leaves an unspent balance of \$1,459,309 on the contract. The financial analysis states that this contract would need \$3,419,464 in order to carry over the contract for eight (8) months. The amount of \$1,459,309 that is unspent is deducted from the Financial Analysis forecast spend as shown under the Financial Impact section of this Executive Summary. This is the first request for additional spending for RFP 17-005V during the three (3) year period.

<u>Award Amount:</u>	<u>\$13,000,000</u>
<u>Purchase Orders:</u>	<u>\$11,540,691</u>
<u>Unused Spending:</u>	<u>\$1,459,309</u>
<u>Financial Analysis Forecast (8 Months)</u>	<u>\$3,419,464</u>
<u>Unused Spending:</u>	<u>\$1,459,309</u>
<u>Additional Spending Authority Requested</u>	<u>\$1,960,155</u>

For Fiscal Year 2016-2017, the spending amount came to \$4,203,164, and for the Fiscal Year 2017-2018, the spending amount came to \$3,999,335.

Also, this contract utilizes a significant number of S/M/WBE vendors who provide services under this RFP. To date, the spending amount for S/M/WBE vendors is \$7,066,014, and non S/M/WBE vendors is \$4,474,677.