



**REQUEST FOR PROPOSALS FOR
ELDERLY/DISABLED RESIDENT
SERVICE COORDINATION
For
THE HOUSING AUTHORITY OF THE
COUNTY OF MARIN**

RFP Issued:	July 26, 2010
Proposals Due:	August 10, 2010

**REQUEST FOR PROPOSALS (RFP) #AMP2SC-RFP-2010
ELDERLY/DISABLED RESIDENT SERVICE COORDINATION
FOR THE HOUSING AUTHORITY OF THE COUNTY OF MARIN**

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EXHIBITS:

- A. MHA Economic Opportunities Policy - Section 3 Requirements
- B. Form HUD-5369 B
- C. Form HUD-5369 C
- D. Insurance Requirements for Service Providers
- E. Sample Service Provider Agreement
- F. Sample Service Coordinator Job Description

1. GENERAL INFORMATION

1.1 RFP Introduction.

The Housing Authority of the County of Marin (MHA or "the Authority") invites interested and qualified social service providers, "Contractor" to submit proposals to provide and/or coordinate the referral and delivery of a wide range of supportive social services to residents living in the Authority's five public housing sites designated for the elderly and/or disabled.

In addition, in accomplishing our mission to assist low and moderate-income residents of Marin to secure and maintain high quality affordable housing, the Authority seeks and accepts various grants to provide services to residents that either assists families make progress towards self-sufficiency or in the case of the elderly and disabled, improve their living conditions and enable them to age-in-place and avoid placement in a full-care facility to the greatest extent possible.

Currently, the Authority owns and/or operates over 490 public housing units throughout the County of Marin.

1.2 Elderly/Disabled Public Housing Development

The Authority owns and operates five Public Housing sites, designated for elderly and/or disabled. The complexes are scattered within the County of Marin in the cities of San Rafael, Novato, and Mill Valley. The complex names, location, and number of units are: 1) Kruger Pines, Mill Valley, 56 units; 2) Homestead Terrace, Mill Valley, 28 units; 3) Casa Nova, Novato, 40 units; 4) Venetia Oaks, San Rafael, 36 units; and 5) Golden Hinde, San Rafael, 40 units.

Fifty four percent (54%) of the tenants are elderly (age 62 and over) but not disabled, 40% are disabled but not elderly, and 6% are both elderly and disabled.

The Elderly/Disabled Development is staffed by a Property Manager that oversees the operations of all five complexes, a Resident Manager at Kruger Pines, and five maintenance staff. All five complexes have tenant representatives and key holders.

1.3 This Project: Resident Opportunities for Self Sufficiency (ROSS) – Service Coordinator

The Authority was selected to receive funding in the amount of \$240,000 over three years under the Fiscal Year 2009 Resident Opportunities and Self-Sufficiency (ROSSS) Service Coordinators Program through the U.S. Department of Housing and Urban Development (HUD). The funding is specifically for the provision of Service Coordination for public housing residents in the designated elderly/disabled complexes and includes funds for salary/benefits, administrative and training costs.

The maximum amount allowable for Service Coordination is \$204,000 (or \$68,000 per year). Training costs and administration costs are separate line items with a maximum allowable for three year totals of \$6,000 and \$30,000 respectively. Training and administration costs are for the grantee and a portion may be allocated to the Service Provider. Budget augmentations may be considered with grantee and HUD approval for shifts in the line item costs. The Agreement between HUD and Marin Housing Authority is anticipated to be executed in July 2010. Actual commencement of the Resident Services/Coordination is scheduled to begin in September 2010 or sooner.

2. SCOPE OF SERVICES

2.1 Services Provided by Contractor.

- A. Contractor shall provide a Service Coordinator whose responsibilities are detailed in Section 2.2. of this section. The Service Coordinator shall at all times remain an employee of Contractor, and be subject to Contractor's rules, regulations, standard operating procedures, and employment policies.
- B. Contractor will provide Marin Housing with a copy of any position descriptions and qualifications of any staff assigned. The Coordinator should meet the minimum employment standards outlined in Marin Housing's Service Coordinator classification (Exhibit F).
- C. Contractor shall provide clinical training, over-site, guidance, and supervision of the Service Coordinator.
- D. MHA shall provide office space and basic office tools for Service Coordination.
- E. Contractor agrees that the Service Coordinator and Marin Housing Staff shall work together as a team to conduct outreach to residents of Marin Housing Authority's 5 elderly/disabled complexes by building trusting relationships with tenants, providing property management liaison, assessing clients' needs for services, making referrals, and coordinating services for tenants.

2.2 Responsibilities of the Service Coordinator

A. Location of Work

The Service Coordinator will have a primary office space with office equipment at Marin Housing Authority, 4020 Civic Center Drive, San Rafael, CA 94903. The Service Coordinator will conduct regularly scheduled resident meetings at all five elderly/disabled public housing

sites, all located within Marin County. As deemed appropriate, the Service Coordinator may be required to work at various sites.

B. Coordinate a Local Program Coordinating Committee

The Service Coordinator will coordinate a local committee with service providers to ensure that program participants are linked to supportive services needed to age-in-place. The Service Coordinator will act as liaison between the residents, Marin Housing's Property Management and the local service providers.

C. Service Coordination

The Service Coordinator will:

- Provide general case management which includes intake, assessment, and referral of residents to service providers in the general community;
- Coordinate and oversee the delivery of services, ensuring services are provided on a regular, ongoing, and satisfactory basis;
- Coordinate services for elderly or disabled residents to age-in-place including Activities of Daily Living, meal services, personal emergency response resources, disability counseling, etc.;
- Coordinate and sponsor educational events which may include subjects related to health care, life skills, money management, nutrition, housekeeping, hoarding and clutter issues, etc.;
- Assist property management with engaging tenants at monthly site meetings and encourage residents to build informal support networks with other residents, family, and friends;
- Assist property management with identifying and coordinating services for tenants who have hoarding/clutter issues that may jeopardize their health and safety;
- Track and report to Marin Housing's grant manager on the progress of residents enrolled in the program for HUD reporting;
- Track and report to Marin Housing's grant manager on in-kind match requirement from various agencies with whom Marin Housing has Memorandums of Understanding.

2.3 Services Provided By Marin Housing

- A. Marin Housing shall provide training to the Service Coordinator including orientation to: the overall structure and philosophy of Marin Housing and the roles and responsibilities of Marin Housing staff; resources available within Marin Housing; Property management; and Marin Housing's policies and procedures regarding lease enforcement.

- B. Marin Housing will provide the Service Coordinator an Excel spreadsheet for the collection of data for HUD reporting. The Marin Housing grant manager will train and provide oversight and management of the collection of data.
- C. Marin Housing agrees to participate in supervision meetings with contractor staff as needed.
- D. Marin Housing shall reserve the right to reasonably request that contractor replace the assigned staff for the following reasons: 1) Neglect of non-performance of duties; 2) Disorderly conduct, use of abusive or offensive language, or fighting; 3) Criminal action; 4) Selling, consuming possessing or being under the influence of intoxicants, including alcohol or illegal substances, while on assignment in Marin Housing complexes; 5) Inadequate punctuality or attendance; and 6) Substantiated complaints from public housing residents or management.

2.4 Reporting and Evaluation

- A. The Service Coordinator will maintain a confidential client file for each resident who receives services. This file will contain, at a minimum, a written assessment of the residents needs; case notes that record any services provided to the participant, referrals made on behalf of the participant, and the outcome of any referrals; documentation of the reason for any termination of services. For clients receiving more intensive services, a service plan or treatment plan (with regular updates) will be included. The files shall include any forms deemed necessary for HUD's eligibility and reporting requirements.
- B. Service Coordinator shall provide a monthly report to the grant manager that is in an acceptable format.
- C. The Service Coordinator shall assist in the semi-annual evaluation of the program by collecting and maintaining data as needed by Marin Housing.
- D. Marin Housing is responsible for ensuring that all reports and evaluations of the Program are completed in a timely manner as required by HUD.

3. AGREEMENT (CONTRACT) SPECIFICATIONS.

The selected social service agency must have the expertise to carry out the required work and have the experience described below.

3.1 General Requirements

The initial term of the Contract shall be two (2) years, with the Authority's option of extending the contract for one (1) additional year. The Authority intends to begin receiving services as soon as practical.

Any agreement as a result of this RFP is in no way intended to grant or guarantee an exclusive relationship between the Authority and the selected Contractor.

All submitted proposals and information included therein or attached thereto shall become public records upon opening and accordingly subject public disclosure as it may apply to the Authority. Upon opening all proposals shall become the property of the Authority.

The Agreement shall provide that the Authority reserves the right to cancel any agreement at any time upon thirty (30) days prior notice of its intent to terminate the agreement. The Authority may cancel agreement with less than 30 days notice if the Authority finds that the terms of the agreement have been violated and the contractor does not take immediate steps to meet the violated terms. The contractor shall provide the Authority at least thirty (30) days prior written notice of its intent to terminate the agreement.

The Authority reserves the right to reject any or all proposals, to waive any non-material irregularities or informalities in any proposal and to accept or reject any item or combination of items in any proposal.

3.2 Terms and Conditions

The Authority reserves the right to reject any and all proposals with or without cause.

The Authority reserves the right to request clarification of information submitted and to request additional information regarding any or all proposals. Refusal to provide such information upon request may cause the proposal to be rejected.

The Authority reserves the right to award any contract to the next most qualified service provider if the successful service provider does not execute a contract or any terms of the contract within thirty (30) days after the award of the proposal.

The contract resulting from acceptance of an RFP by the Authority, shall be in a form supplied or approved by the Authority and shall reflect the specifications in this RFP.

The Authority shall not be responsible for any costs incurred by the service provider in preparing, submitting or presenting its response to the RFP.

3.3 Proposal Submission Requirements

Please include the items in the order listed:

1. Cover Letter (maximum 1 page): Letter introducing the service provider, outlining the attachments and naming the individual who will be the contract administrator.
2. Description of Organizational Experience (maximum 2 pages): List specific organizations for which Service Provider has performed service similar to those

described in this RFP. List specific qualifications/experience in providing and/or coordinating the referral and delivery of a wide range of social support services for residents of public housing. Describe experience working with the relevant population; low to extremely low elderly and/or disabled individuals. List relevant service providers with whom the organization already has linkages for referrals both formalized through Memorandum of Understanding or informally through various collaborations and partnerships. List previous experience working with Housing Authority tenants/residents.

3. Description of Clinical Capacity (maximum 1 page): Describe the Service Provider's capacity and experience providing clinical supervision. Describe the Service Providers plan for on-going supervision, staff development training, and case file monitoring. Include frequency of meetings and other contacts.
4. Resumes: Resumes or bios of the Service Provider's principals and staff who will be assigned to the work. The resumes or descriptions should detail the individual's in handling the type of services solicited in this RFP.
5. References: Letters of support from relevant organizations and/or contact information for three (3) professional references.
6. Detailed Budget: Budget should indicate total cost to carry out the Scope of Services. At a minimum, budget should include salary/benefits of the staff, cost of clinical supervision, and administration. Include match if applicable.
7. Non-debarment Certification: A certified statement that the service provider is not debarred, suspended or otherwise prohibited from professional practice by any federal, state or local agency. The statement must read as follows: "This is to certify that _____ (Service Provider name), involved with this work, is not debarred, suspended, or otherwise prohibited from contracting by any Federal, State, or local agency."

3.4 HUD Requirements

- A. Section 3 (see Exhibit A) – The selected Service Provider will be required to certify Section 3 provisions at the time of contract execution. The Service provider must also comply with all provisions of the section 3 clause in Exhibit A.
- B. HUD Certifications and Representations of Offerors (see Exhibit B and C) – The selected Service Provider will be required to complete the Certifications and Representations of Offerors HUD form 5369-C found in Exhibit C.

3.5 Insurance Requirements

The selected Service Provider will be required to comply with the Authority's Insurance Requirements (see Exhibit D for Insurance Requirements for Social Service Providers).

3.6 Indemnification

The selected Service Provider must expressly agree to defend, hold harmless and indemnify the Authority, its commissioners, officers, agents and employees, of and from any claims, loss, damage, injury, actions, causes of action and liability, including brokers' fees arising out of or connected with the Service Provider's carry over operations or performance under the resultant contract.

4. PROCESS FOR SELECTING SERVICE PROVIDER CONTRACTOR

4.1 RFP Timeline. The following are proposed dates relating to this selection process:

Issue RFP	July 26, 2010
Final Day to Submit Written Questions	August 2, 2010
Response to Written Questions Posted	August 4, 2010
Proposals Due	August 10, 2010
Evaluate Proposals	August 12, 2010
Conduct Interviews (if necessary)	August 17, 2010
Select Service Provider	August 20, 2010
Complete Negotiations and Execute Agreements	September 1, 2010

4.2 Questions. All questions must be submitted in writing no later than 4:00 p.m. on August 2, 2010. All answers to questions will be posted on www.marinhousing.org by close of business August 4, 2010. No questions will be responded to after the question and answer period has expired. Questions are to be submitted either by mail or email to:

June Miyake
Director of Supportive Housing
County of Marin Housing Authority
4020 Civic Center Drive
San Rafael, CA 94903
Phone: (415) 491-2577/Fax: (415) 472-2186
E-mail: Jmiyake@marinhousing.org

4.3 Proposal Due Date. Responses to this solicitation will be accepted in the Authority Office or Postmarked by **Tuesday, August 10, 2010.** Respondents must provide one (1) original copy, clearly marked "ORIGINAL," and three (3) copies clearly marked "COPY," of the required submission (see section 3.3 of this RFP). Proposals will be date and time stamped by MHA staff and a receipt provided for the proposal. Proposals will only be accepted at this location.

4.4 Selection Process. All responses will be reviewed for completeness and responsiveness. Proposals will be reviewed, scored, and ranked according to the

published criteria shown herein. The selection will be the sole responsibility of the Authority. The Authority reserves the right to reject any and all proposals, and shall select a service provider based on the most advantageous conditions for the Authority.

4.5 Evaluation Criteria. The following criteria will be used to evaluate all proposals:

The Authority will evaluate each Proposal to determine responsiveness to the Authority's needs. The Authority reserves the right, at any time, to reject any or all Proposals. Award of a contract, if made, will be to the applicant that meet all requirements of the RFP and that receives the highest overall number of points in accordance with the stated evaluation criteria.

Each Proposal will be independently analyzed by members of an evaluation team. The Authority may require the Service Providers to submit additional materials to supplement its proposal. After all proposals have been reviewed and ranked, the most qualified respondents may or may not be interviewed by the evaluation team. Points will be assigned to each Statement of Proposal for all weighted areas. The evaluation team will make a recommendation to the Authority's Board of Commissioners. Final approval will be made by the Board of Commissioners.
Total points possible: 100.

A description of the required Proposal Submission Requirements is set out at Section 3.3.

No.	Criteria	Points
1.	<p><u>Experience:</u> The Service Provider has prior experience in performing similar work with similar populations.</p> <p>Narrative description by service provider listing: specific organizations for which Service Provider has performed service similar to those described in this RFP; specific qualifications/experience in providing and/or coordinating the referral and delivery of a wide range of social support services for residents of public housing; experience working with low to extremely low elderly and/or disabled individuals.</p> <p>List relevant service providers with whom the organization already has linkages for referrals both formalized through Memorandum of Understanding or informally through various collaborations and partnerships.</p> <p>List past experience with Housing Authority residents/tenants.</p>	50
2.	<p><u>Qualification of the service provider and assigned individuals:</u></p> <p>1) Resumes or bios of key personnel and those who will be assigned to the work.</p> <p>2) Letters of support or other references.</p>	20
3.	<p><u>Proposed plan for clinical supervision:</u></p> <p>Narrative description by the Service Provider regarding capacity and experience providing clinical supervision. Narrative description of the plan for on-going supervision, staff development training, and case file monitoring, including the frequency of meetings and other contacts.</p>	20
4.	<p><u>Budget:</u></p> <p>Budget should be cost effective and indicate adequate clinical supervision. Match is favorable although not required.</p>	10
	<u>Total</u>	100

EXHIBIT A

**Marin Housing Authority Economic Opportunities Policy –
Section 3 Plan Requirements**

EXHIBIT B

**Form HUD – 5369 B:
Instructions to Offerors
(Non-Construction)**

EXHIBIT C

**Form HUD – 5369 C:
General Contract Conditions
(Non-Construction)**

EXHIBIT D

**Marin Housing Authority
Insurance Requirements
For Social Service Providers**

EXHIBIT E

**Sample
Marin Housing Authority
Service Provider Agreement**

EXHIBIT F

**Marin Housing Authority
Service Coordinator Sample Job Description**