MANHATTAN BASED SUPPORTED HOUSING FOR ADULTS WITH SERIOUS MENTAL ILLNESS WHO ARE OMH PSYCHIATRIC CENTER LONG TERM STAYERS

Request For Proposals

New York City Field Office

April 2012
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1 Introduction and Background

1.1 Purpose of the Request for Proposal

The New York State Office of Mental Health (OMH) announces this Request for Proposals (RFP) for the development and operation of up to 80 units of Supported Housing for persons residing in OMH psychiatric centers or OMH transitional housing programs serving New York City residents. These are individuals with serious mental illness who have resided in an OMH psychiatric center and/or OMH transitional housing program for one year or longer. All housing will be sited in the borough of Manhattan. Please see Section 5 for more details on eligibility for the housing.

2 Proposal Submissions

2.1 Letter of Intent

It is mandatory that all agencies interested in responding to the Request for Proposals submit a Letter of Intent to Bid to the OMH Issuing Officer by April 11, 2012. The Letter of Intent to Bid shall be non-binding.

Please mail the letter of intent to the Issuing Officer:

Laurie Danforth, Contract Management Specialist 1
New York State Office of Mental Health
Contracts and Claims-7th Floor
44 Holland Avenue
Albany, NY 12229

Attn: Letter of Intent-NYC Long Term Stayers/Manhattan

2.2 Designated Contact/Issuing Officer

OMH has assigned an Issuing Officer for this project. The Issuing Officer or a designee shall be the sole point of contact regarding the RFP from the date of issuance of the RFP until the issuance of the Notice of Conditional Award. To avoid being deemed non-responsive, a bidder is restricted from making contact with any other personnel of OMH regarding the RFP. Certain findings of non-responsibility can result in rejection for a contract award. The Issuing Officer for this RFP is:
2.3 **Key Events/Timeline**

- RFP Release Date: 04-04-2012
- Mandatory Letter of Intent Due: 04-11-2012
- Questions Due: 04-25-2012
- Questions Posted on Website: 05-02-2012
- Proposals Due: 05-16-2012
- Award Notification: 06-15-2012
- Anticipated Start Date: 07-01-2012

2.4 **RFP Questions and Clarifications**

All questions or requests for clarification concerning the RFP shall be submitted in writing to the Issuing Officer by fax at (518) 402-2529 or by e-mail by April 25, 2012. The questions and official answers will be posted on the OMH website by May 2, 2012 and will be limited to addressing only those questions submitted by the deadline. No questions will be answered by telephone or in person.

2.5 **Addenda to Request for Proposals**

It is the bidder's responsibility to periodically review the OMH website to learn of revisions or addendums to this RFP. Changes to the RFP will also be posted in the NYS Contract Reporter. No other notification will be given.

2.6 **Eligible Agencies**

Agencies eligible to respond to this RFP are: (1) not-for-profit agencies with 501(c)(3) incorporation that have experience providing housing and mental health support services to individuals with serious mental illness in New York City, and who receive funding from OMH or the New York City Department of Health and Mental Hygiene for those programs.

2.7 **Disqualification Factors**

Following the opening of bids, a preliminary review of all proposals will be conducted by the Issuing Officer or a designee to review each proposal's submission for completeness (as defined in Section 2.8) and verify that all eligibility criteria have been met. Proposals that do not meet basic participation standards will be disqualified, specifically:

- Proposals that do not comply with the RFP required format as defined in Section 2.9; and
- Proposals from current providers of OMH licensed programs that are in Tier III, or equivalent, status.
2.8 Executive Order #38

Pursuant to Executive Order#38 (http://www.governor.ny.gov/executiveorder/38), dated January 18, 2012, State agencies are required to promulgate regulations and take any other actions within the agency's authority, including amending agreements with providers, to limit provider administrative costs and executive compensation. Any contract awarded through this RFP will be subject to such restrictions and to related requirements. Once established, the requirements will be posted to OMH's website.

2.9 Instructions for Bid Submission and Required Format

Each proposal is required to contain:

1. Agency Transmittal Form (Appendix A);
2. Proposal Narrative;
3. Operating Budget (Appendix B);

The Proposal Narrative should be concise (no more than 20 pages, not including attachments). The Operating Budget and Budget Narrative (Appendix B and B1) are separate documents that appear in the RFP section of the OMH website and can be downloaded in Excel or PDF format. Bidders must not substitute their own budget format. Failure to use the provided Operating Budget and Budget Narrative formats may result in disqualification for non-responsiveness.

Bidders must submit six (6) unstapled copies of the full proposal package by mail or hand delivery to be received by close of business on May 16, 2012. Bidders should allow a sufficient mail delivery period to ensure timely arrival of their proposals. Proposals shall not be submitted via e-mail or facsimile. Any proposal received after the deadline will be reviewed solely at the discretion of OMH.

2.10 Packaging of RFP Responses

Proposals should be sealed in an envelope or box and sent to:

Laurie Danforth, Contract Management Specialist 1
New York State Office of Mental Health
Contracts and Claims-7th Floor
44 Holland Avenue
Albany, NY 12229
Attn: RFP Supported Housing For Long Stay Individuals-Manhattan

3 Administrative Information

3.1 Term of Contracts

Contracts will be written for a total period of five (5) years, with an initial period of one (1) year and four (4) annual renewals, dependent upon appropriated funding. OMH reserves the right to change the contract term for the first or second year so that it is
more or less than 12 months in order to align the contract dates with OMH’s New York City contract cycle (July 1 through June 30).

If an agency not previously awarded a contract as part of the original RFP evaluation is awarded beds through the reallocation process (see Section 4.3.2), the five (5) year contract term will commence on the award date. OMH reserves the right to change the first year’s contract term, as stated above.

The OMH Direct Contract Form is available in Appendix C.

### 3.2 Reserved Rights

OMH reserves the right to:

- Reject any or all proposals received in response to the RFP that are deemed non-responsive or do not meet the minimum requirements;
- Withdraw the RFP at anytime, at the agency’s sole discretion;
- Make an award under the RFP in whole or in part;
- Disqualify a bidder whose conduct fails to conform to the requirements of the RFP;
- Seek clarifications of proposals for the purposes of assuring a full understanding of the responsiveness to the solicitation requirements;
- Use proposal information obtained through the state’s investigation of a bidder’s qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the agency’s request for clarifying information in the course of evaluation and/or selection under the RFP;
- Prior to the bid opening, direct bidders to submit proposal modifications addressing subsequent RFP amendments;
- Prior to the bid opening, amend the RFP specifications to correct errors or oversight, supply additional information, or extend any of the scheduled dates or requirements and provide notification to potential bidders via the OMH website and the New York State (NYS) Contract Reporter;
- Eliminate any non-material specifications that cannot be complied with by all of the prospective bidders;
- Waive any requirements that are not material;
- Negotiate any aspect of the proposal in order to assure that the final agreement meets OMH objectives;
- Conduct contract negotiations with the next responsible bidder, should the agency be unsuccessful in negotiating with the selected bidder;
• Require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a bidder’s proposal and/or to determine a bidder’s compliance with the requirements of the solicitation;

• Conduct a readiness review of each selected bidder prior to the execution of the contract as set forth in Section 4.4;

• Cancel or modify contracts due to the insufficiency of appropriations;

3.3 Debriefing

OMH will issue award and non-award notifications to all bidders. Non awarded bidders may request a debriefing in writing regarding the reasons that their own proposal was not selected and/or disqualified within 15 business days of the OMH dated letter. OMH will not offer ranking, statistical, or cost information of other proposals until after the NYS Office of the State Comptroller has approved all awards under this RFP. Written debriefing requests may be sent to the Designated Contact, as defined in Section 2.2.

3.4 Protests Related to the Solicitation Process

Protests of an award decision must be filed within fifteen (15) business days after the notice of conditional award or five (5) business days from the date of the debriefing. The Commissioner or his designee will review the matter and issue a written decision within twenty (20) business days of receipt of protest. All protests must be in writing and must clearly and fully state the legal and factual grounds for the protest and include all relevant documentation. The written documentation should clearly state reference to the RFP title and due date. Such protests must be submitted to:

NYS Office of Mental Health
Commissioner Michael Hogan
44 Holland Avenue
Albany, New York 1229

4 Evaluation Factors for Awards

4.1 Evaluation Criteria

All proposals will be rated and ranked in order of highest score based on an evaluation of each bidder’s written submission as well as OMH internal reviews.
The Evaluation will apply points in the following categories as defined in Section 5.5:

<table>
<thead>
<tr>
<th>Technical Evaluation</th>
<th></th>
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<tbody>
<tr>
<td>Population</td>
<td>20</td>
</tr>
<tr>
<td>Housing Implementation</td>
<td>30</td>
</tr>
<tr>
<td>Agency Performance:</td>
<td></td>
</tr>
<tr>
<td>• Bidder’s Narrative</td>
<td>30</td>
</tr>
<tr>
<td>• OMH Internal Reviews</td>
<td></td>
</tr>
</tbody>
</table>

| Financial Assessment                | 20   |
| Total Proposal Points               | 100  |

For a detailed description of evaluation criteria for the Technical Evaluation and the Financial Assessment components, see Section 5.5 (Proposal Narrative).

The OMH internal review will consist of an assessment of the bidder’s organizational competency. This will include a review of the bidder’s residential programs over the past two years to assess occupancy rates and admissions from priority populations.

### 4.2 Method for Evaluating Proposals

Designated staff will review each proposal for completeness and verify that all eligibility criteria are met. A complete proposal shall include all required components as described in Section 2.9. If a proposal is not complete or does not meet the basic eligibility and participation standards as outlined in Sections 2.6 and 2.7, the proposal will be eliminated from further review. The agency will be notified of the rejection of its proposal within 10 working days.

Evaluation of proposals will be conducted in two parts: Technical Evaluation and Financial Assessment. OMH’s evaluation committee, consisting of at least three evaluators, will review the technical portion of each proposal and compute a technical score. A financial score will be computed separately based on the operating budget and budget narrative submitted.

Evaluators of the Technical Evaluation component may then meet to discuss the basis of those ratings. Following the discussion, evaluators may independently revise their original score in any section. Once completed, final Technical Evaluation scores will then be recalculated, averaged, and applied to the final Financial Assessment score to arrive at final scores. Any proposal not receiving a minimum average score of 65 will be eliminated from consideration.

In case of a tie in the scoring process, the proposal with the highest score on the Housing Implementation section will be ranked higher.
4.3 Process for Awarding Contracts

4.3.1 Initial Awards and Allocations

Proposals will be rated and ranked in order of highest to lowest score. Awards will be made based on score until all the beds for the psychiatric center catchment area have been allocated.

In the interest of spreading these resources as broadly as possible, no one provider will initially receive more than 20 supported housing units. If there are beds still to be distributed after allocations are made to all applicants with passing scores, the remaining beds will then be distributed not to exceed the amount of beds requested by the agency to the applicant with the highest score, and work its way down the list.

4.3.2 Reallocation Process

There are a number of factors that may result in some or all of the Supported Housing units allocated to one or more contractors being reallocated. This includes, but is not limited to, failure to develop the housing within the approved time frame, inability to find Supported Housing apartments and retention of clients in the housing. A contractor will be provided notification if any or all of the units allocated to it are reallocated.

To reallocate beds, OMH will go to the next highest ranked proposal that did not get an initial award of beds. If all agencies with passing scores received an initial award of beds, OMH will go back to the top of the list. An award of up to 20 beds will be offered to the highest ranked agency not to exceed the amount of beds requested by agency. If the agency does not accept the award, OMH will work its way down the list.

4.4 Award Notification

At the conclusion of the procurement, notification will be sent to all successful and non-successful bidders. All awards are subject to approval by the NYS Attorney General and the Office of State Comptroller before an operating contract can be finalized.

OMH reserves the right to conduct a readiness review of the selected bidder prior to the execution of the contract. The purpose of this review is to verify that the bidder is able to comply with all participation standards and meets the conditions detailed in its proposal.

Upon receipt of an approved fully executed contract from NYS, contractors can begin to locate apartments appropriate for Supported Housing.

5 Scope of Work

5.1 Introduction
This RFP is issued to provide rental assistance, contingency funds, and housing case management services for up to 80 individuals that meet the Psychiatric Center (PC) Long Stay criteria outlined below. Agencies will be selected to develop housing units within the borough of Manhattan.

The housing and services developed through this RFP are designated for individuals meeting the following eligibility criteria:

- Individuals with a serious mental illness who are current residents of OMH Psychiatric Centers or OMH-operated residential programs and have resided in either for a period of one year or longer.

Within this group, individuals with an Assisted Outpatient Treatment (AOT) order are eligible for priority access. See Appendix D for the criteria for determining Serious Mental Illness.

Supported Housing beds will be allocated as follows:

- Manhattan – 80 units for referrals from Manhattan PC and NYC residents at Rockland PC;

Proposals must specify the PC(s) that will be targeted for the housing.

Agencies must work with the Psychiatric Center (PC) to target the appropriate housing for that particular PC’s priority Long Stay population, i.e., provide in-reach, develop coordinated discharge/admission plans with PC staff, and identify/provide services and supports to ensure successful transition into the community. Referrals may be sent directly from the PC or through the Single Point of Access (SPOA). Referrals through SPOA are eligible for enhanced services funding. This funding is available on a time-limited basis to assist the individual’s transition into the community.

PC Long Stay individuals may be placed directly into Supported Housing, or providers may use this new Supported Housing capacity for persons currently residing in more service-intensive, OMH funded residential programs. The vacated units in the service intensive programs are then targeted to the population detailed above. Such plans are referred to as “backfill” arrangements. If an agency intends to backfill, preference will be given to those agencies that have a continuum of housing and/or agreements with other agencies for filling the beds with the target population.

Agencies planning backfill arrangements with other OMH housing providers in NYC shall submit a Memorandum of Understanding that explains the agreement with each agency, i.e., number of residents identified to move into the Supported Housing, and agreement to backfill the vacancies with referrals from the target population.

The Supported Housing units developed under this RFP are permanently designated to serve the PC Long Stay individuals. This means for units developed under this proposal, any vacancies that occur as these units “turn over” must also be filled with this population.
If the agency chooses to backfill, and the individual in the backfill bed moves to another level of OMH housing, the agency is not required to fill the vacated bed with another Long Stay individual. The “PC Long Stay” designation will remain with the individual as long as they remain in OMH housing. The contract agency is required to fill the backfill bed with a PC Long Stay individual if a vacancy occurs under one of the following conditions: 1) the client is discharged to an acute care hospital or OMH psychiatric center; or 2) the client is discharged within the first six (6) months of admission for any reason.

The NYC Field Office or designee must approve all referrals into the Supported Housing and/or the backfill bed prior to admission.

5.2 Objectives and Responsibilities

Supported Housing is “extended stay/long term” housing. Residents of Supported Housing can remain in this housing as long as their clinical and financial circumstances render them eligible and allow them to meet their responsibilities as a tenant. Supported Housing is not lost during acute hospitalization (90 days or less), and there are no program attendance requirements. Residents of Supported Housing are tenants and will have the same rights and responsibilities as any other tenant in New York City.

Supported Housing provides affordable, independent housing and access to community based support services based on the needs and desires of the resident. Residents of Supported Housing may be able to live in the community with a minimum of staff intervention from the contract agency. Others may need the provision of additional supports, such as an Assertive Community Treatment (ACT) team and intensive or supportive case management services. Some residents may be coping with co-occurring substance abuse disorders and be at various stages of recovery.

Services provided by the contractor will vary, depending upon the needs of the resident. Supported Housing staff will encourage and assist residents to develop natural community supports, use community resources and pursue an individualized path towards recovery in securing necessary supports. Staff will help the individual to establish a household and facilitate the resolution of landlord-tenant issues. It is expected that the need for services provided by the contractor and other agencies will decrease over time as integration in the community improves and the residents make progress in their recovery.

When possible, tenants should hold their own leases. Renting studio, one-bedroom and two-bedroom apartments scattered throughout the community is the norm. In instances where roommates are involved, the agency must facilitate cooperative arrangements on bill payments, division of household responsibilities and other matters.

Supported Housing is integrated housing that consists of scattered site apartments located in multiple buildings throughout the community. The goal is to provide individuals with a setting in which they live in their own apartments and are able to interact with non-disabled persons to the fullest extent possible.
There is no capital funding associated with this initiative to purchase or renovate an existing apartment building.

A contractor may use other government funding or agency funds to purchase and/or renovate a building. In this instance, contractors must be able to document that funding is adequate to pay the debt service, ongoing building maintenance and repairs. **Contractors must consult with the OMH New York City Field Office Housing Unit before purchasing a site or entering into a long-term lease.**

Supported Housing funding provides rent stipends, housing case management services, and contingency funds as specified in the Supported Housing Guidelines. There are no OMH licensing requirements. Contractors must comply with the OMH Supported Housing Guidelines. A copy of the [OMH Supported Housing Guidelines](http://www.omh.ny.gov/omhweb/spguidelines/) is posted on OMH’s website as part of this RFP and should be reviewed prior to responding to the RFP.

In addition, all buildings in which apartments are located must have a valid Certificate of Occupancy. The OMH New York City Field Office monitors Supported Housing and conducts site visits to review compliance with the Guidelines.

### 5.3 Reporting Requirements

Agencies that receive an allocation of housing resources under this RFP must agree to ensure that these units will only be filled with individuals residing in an OMH Psychiatric Center or OMH operated residential program who meet the eligibility criteria.

Agencies must conform to all OMH fiscal reporting requirements as outlined in the “Aid to Localities Spending Plan Guidelines.” These guidelines are available on the Internet at [http://www.omh.ny.gov/omhweb/spguidelines/](http://www.omh.ny.gov/omhweb/spguidelines/).

Agencies awarded a Supported Housing contract will be required to maintain accurate reporting of all admissions and discharges through OMH’s Child and Adult Integrated Reporting System (CAIRS) and comply with any requirements OMH may subsequently develop to ensure compliance. They will be required to participate in the Single Point of Access. In addition, agencies will be required to provide updates on housing vacancies to the Center for Urban Community Services (CUCS) which publishes the “Vacancy and Information Update.”
5.4 Operating Funding

Funding for scattered site Supported Housing is a combination of client rent payments and OMH funds. Residents of Supported Housing are required to pay 30 percent of their net income for rent and reasonable utilities. Contractors will receive annual funding for units developed under this initiative through an OMH contract at the current New York City Supported Housing rate (currently $14,493 per unit). This funding is for rent stipends, housing case management services and contingency funds, as specified in the Supported Housing Guidelines.

5.5 Proposal Narrative

When submitting proposals for funding under this RFP, the narrative must address all of the components listed below, in the following order:

5.5.1 Population

1. State the PC you are targeting and the number of units to be developed for each PC. State your commitment to filling these units in coordination with the NYC Field Office, the Single Point of Access (SPOA), along with the state psychiatric center that is being targeted. If the agency is proposing to serve the target population through a backfill arrangement, provide the details of that arrangement. Agencies without a continuum of housing that wish to backfill may partner with an OMH licensed housing provider. Submit a Memorandum of Understanding (MOU) between the agencies that will participate in this arrangement.

2. Describe in narrative form the characteristics of the PC Long Stay population to be served in Supported Housing and/or “backfilled” into service intensive programs. Discuss such population characteristics as likely service history, present functional level, educational level, job history, forensic history, community living skills, existence of social supports, substance abuse history, all in the context of individuals that have been hospitalized for over a year, and in some cases, numerous years.

3. Describe in narrative form the service needs of the Long Stay population, specific to the characteristics described in (2) above. Describe the approach that will be used to ensure the successful transition of PC Long Stay individuals and their retention in the community.

5.5.2 Housing Implementation

1. State admission criteria and procedures; include time frames. Agencies cannot reject someone for housing based solely on the past history of potential residents.

2. Describe strategies for in-reach to the OMH Psychiatric Centers and the plans for engagement of potential residents going into the
Supported Housing and/or “backfilled” into service intensive settings. Describe the process for the development of an individualized community re-integration strategy that will address issues of medication compliance, skill development, and substance use prevention. Explain the role of the PC in development of this strategy.

3. Describe the services that will be provided directly by the sponsoring agency. Identify community-based resources that will be available to recipients through referrals and/or linkage agreements. Indicate how these services support the residents’ recovery from mental illness and substance abuse. Describe how all services will take into account the cultural and linguistic needs of the individual.

4. Explain recipient choice related to selecting an apartment and household furnishings. Note if the units will be single or shared apartments. If an individual will share an apartment, explain how recipients will be “matched” and how “roommate” issues will be resolved.

5. Supported Housing is considered “extended-stay” housing. Describe how this key principle will be reflected in the development and ongoing operation of these units.

6. Include the agency’s policy regarding the recipient’s desire to reunite with children or live with a spouse or significant other while remaining in Supported Housing.

7. Provide a staffing plan. Note if these proposed beds will be part of the agency’s current Supported Housing, and if so, explain the impact on staffing ratios. Include a description of the roles and responsibilities of each staff member. Indicate the skills and experience each staff member will be expected to have. Describe initial and ongoing staff training and supervision. Describe the use of peer to peer services and supports that will be available.

8. Explain the lease arrangement. Attach a copy of the proposed lease or sublease agreement. For sublease arrangements, provide the rent collection and rent arrears procedure. Describe the supports provided by the agency to appropriately ensure rent payment is made on time by recipients.


10. Describe the process of support planning that will incorporate strategies to engage and motivate clients towards their recovery and provide an appropriate response to clients who are at risk of relapsing and/or begin refusing their medications. Discuss methods for ensuring
integrated services for residents with co-occurring substance abuse disorders. Describe how residents will be assisted when a mental illness or substance abuse relapse occurs.

11. Provide the policy and procedure for terminating tenancy. Include a description of the range of interventions that would be used to prevent someone from losing their housing. In addition, explain how an individual may “graduate” from Supported Housing to permanent, independent housing. Describe the resources the agency will use to help someone achieve independence.

12. For agencies “backfilling” to service intensive settings, provide discharge planning procedures and explain how the agency will create a culture of transition to ensure that residents are engaged in a process of moving towards more independent housing.

13. Attach the grievance procedure that will be provided to residents. Explain how recipients are empowered to provide input into Supported Housing practice on a formal and informal basis.

14. Explain the process for handling client emergencies after hours and on weekends.

15. Provide a proposed time line for establishing the Supported Housing units and initial tenancy.

5.5.3 Agency Performance

1. Describe the agency’s experience and approach in providing recovery-oriented housing and/or mental health services to persons with mental illness, including helping these individuals achieve their rehabilitation and recovery goals.

2. Current licensed OMH housing agencies must note their agency's ability to target OMH priority populations, average length of stay and ability to transition individuals into independent housing. OMH Supported Housing agencies should indicate occupancy levels and ability to accept OMH priority populations. Base your response on the most recently published Residential Program Indicators Report. Also, please note that agencies will be evaluated on the timeliness of CAIRS reporting.

3. Note: The OMH internal review will consist of an assessment of the bidder’s organizational competency. This will include a review of the bidder’s residential programs over the past two years. Previous OMH actions including, but not limited to, fines, revocations of operating certificates, limitations on operating certificates and/or repeat citations impacting client care will be reviewed in scoring agency performance. Additional areas of organizational competence include: percentage of admissions from OMH Psychiatric Centers or OMH-operated residential programs; transition of residents to more independent housing; and
accuracy and timeliness of CAIRS reporting. If an agency received an award of Supported Housing from a previous allocation, the agency’s performance in filling the beds within the contractual time frame and with the priority population specified will be rated.

5.5.4 Financial Assessment

1. Describe how client and, when applicable, non-client rent will be calculated. Explain how your agency plans to utilize contingency funds. Highlight other sources of funding, if any. Describe how your agency manages its operating budget.

2. Attach an operational budget. Include start-up costs in Year 1 of the budget and assume a full year of operating funds (see Appendix B). The start-up should include the amount needed for the establishment of the units, including cost of staffing, broker fees, security deposits, furniture, moving expenses and other expenses. Show sources of income including client “rent” and OMH funding. Bidders should list staff by position, full-time equivalent (FTE), and salary.

3. Also, bidders must complete a Budget Narrative which should include the following:
   - detailed expense components that make up the total operating expenses;
   - the calculation or logic that supports the budgeted value of each category;
   - description of how salaries are adequate to attract and retain qualified employees; and
   - a description of how apartment rental assumptions are calculated within the geographic area in which they are located.

Use the Operating Budget (Appendix B) and the Budget Narrative (Appendix B1) to submit with your proposal. The Operating Budget (Appendix B) is a separate document on the RFP section of the OMH website and can be downloaded in PDF format. Do not substitute your own budget format. Failure to complete the Operating Budget using the correct form may be cause to reject your proposal for non-responsiveness.