



County of San Mateo

Request for Proposals (RFP) for

CO-HOUSING SERVICES

RFP No. 2022-002

| | |
|--------------------------|--------------------------------------|
| Date issued: | NOVEMBER 14, 2022 |
| Questions due: | December 5, 2022 |
| Pre-Proposal conference: | December 15, 2022 |
| Proposal due: | January 27, 2023 4:00p.m. PST |

RFP Contact: Brad Johnson, Contracts Manager
BrJohnson@smcgov.org

Request for Proposals No. 2022-002 for Co-Housing Program

Table of Contents

| | |
|---|-----------|
| I. <u>Introduction and Schedule</u> | 1 |
| A. <u>General</u> | 1 |
| B. <u>Schedule</u> | 3 |
| II. <u>Background</u> | 4 |
| III. <u>Co-Housing Description</u> | 6 |
| IV. <u>Scope of Work</u> | 7 |
| A. <u>Property Management</u> | 7 |
| B. <u>Support Service Provider</u> | 8 |
| C. <u>Target Population</u> | 10 |
| D. <u>Referrals</u> | 10 |
| E. <u>Length of Stay</u> | 11 |
| F. <u>Co-Housing Community Life</u> | 11 |
| G. <u>Staffing</u> | 11 |
| H. <u>Training</u> | 12 |
| I. <u>Communication/Collaboration Requirements</u> | 12 |
| J. <u>Evacuation Plan</u> | 14 |
| K. <u>Performance Measures</u> | 14 |
| L. <u>Length of Agreement</u> | 14 |
| M. <u>Funding, Claims, and Payment</u> | 14 |
| L. <u>Claims</u> | 15 |
| L. <u>Payment</u> | 15 |
| V. <u>DESCRIPTION OF CAMPUS CENTER AND CO-HOUSING BUILDING</u> | 15 |
| VI. <u>CONSTRUCTION TIMELINE</u> | 17 |
| VII. <u>LEASE UP</u> | 17 |
| VIII. <u>TASK TO COMPLETE BEFORE OPENING</u> | 17 |
| IX. <u>SUBMISSION REQUIREMENTS</u> | 18 |
| A. <u>Submission Deadline</u> | 18 |
| B. <u>Pre-Submission Registration</u> | 19 |
| C. <u>Submission via Public Purchase</u> | 19 |
| D. <u>Technical Proposal (Maximum of 20 pages)</u> | 21 |
| X. <u>EVALUATION AND SELECTION CRITERIA</u> | 25 |
| A. <u>Minimum Qualifications</u> | 25 |
| B. <u>Selection Criteria</u> | 26 |
| XI. <u>Instructions to Proposers</u> | 27 |
| A. <u>Pre-Proposal Conference</u> | 27 |
| B. <u>Communications</u> | 28 |
| C. <u>Contract Award</u> | 28 |

| | | |
|--------------|---|-----------|
| XII. | <u>Terms and Conditions for Receipt of Proposals</u> | 29 |
| A. | <u>Errors, Omissions and Inquiries Regarding the RFP</u> | 29 |
| B. | <u>Objections to RFP Terms</u> | 29 |
| C. | <u>Addenda</u> | 29 |
| D. | <u>Term of Proposal</u> | 30 |
| E. | <u>Revision of Proposal</u> | 30 |
| F. | <u>Errors and Omissions in Proposal</u> | 30 |
| G. | <u>Withdrawal of Proposals</u> | 31 |
| H. | <u>No Commitment</u> | 31 |
| I. | <u>Financial Responsibility</u> | 31 |
| J. | <u>Estimated Quantity</u> | 31 |
| K. | <u>Public Record</u> | 31 |
| L. | <u>Reservations of Rights by the County</u> | 33 |
| M. | <u>No Waiver</u> | 33 |
| N. | <u>Cooperative Agreement (Piggyback)</u> | 34 |
| XIII. | <u>Protest Procedures</u> | 35 |
| A. | <u>Protest of Non-Responsiveness Determination</u> | 35 |
| B. | <u>Protest of Contract Award</u> | 35 |
| C. | <u>Delivery of Protests</u> | 35 |

APPENDICES AND ATTACHMENTS:

- Appendix A - Minimum Qualifications Checklist
- Appendix B – Co-Housing Responsibility Matrix
- Appendix C – Budget Worksheet
- Appendix D – Housing First Fact Sheet
- Appendix E – Co-Housing Floor Plan

ENCLOSURES

- Enclosure 1 - Standard Terms and Conditions, Sample Agreement
- Enclosure 2 - Standard Agreement Administrative Requirements
- Enclosure 3 - Living Wage Ordinance
- Enclosure 4 - HIPAA Requirements
- Enclosure 5 - NOT USED
- Enclosure 6 - NOT USED
- Enclosure 7 - Fingerprinting certification if applicable
- Enclosure 8 - Chapters 2.84 and 2.85 if applicable
- Enclosure 9 - NOT USED
- Enclosure 10 – Attachment I – 504 Compliance

I. Introduction and Schedule

A. GENERAL

The County of San Mateo (the “County” or SMC) covers most of the San Francisco Peninsula. The region covers 744 mi² and is home to nearly 775,000 residents. The County is made up of 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education, and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare, and natural resources of the community.

The County Health, Behavioral Health and Recovery Services (BHRS) department provides services for residents who are on Medi-Cal or are uninsured including children, youth, families, adults and older adults, for the prevention, early intervention, and treatment of mental illness and/or substance use conditions. BHRS is committed to supporting treatment of the whole person to achieve wellness and recovery, and promoting the physical and behavioral health of individuals, families and communities we serve.

BHRS is soliciting proposals from qualified and interested providers to work together to deliver two different services that together comprise a Co-Housing program. Aligned with the federal Substance Abuse and Mental Health Services Administration (SAMHSA) best practice for supportive housing for people with mental illness, the Co-Housing program must be operated by two different organizations. One will provide the Property Management services for the Co-Housing and the other will provide Support Services needed by the residents. The two organizations will choose to work together and submit a joint proposal. However, BHRS will issue separate contracts for the services provided by the Property Management organization and the Support Services Provider organization.

Site of Co-Housing

The Co-Housing will sit on a campus on unincorporated County land on Edmonds Road near Redwood City and will be located on the top two floors of the Campus Center (Campus) at that site with services on the first floor such as primary care that are not a focus of this RFP as well as others that are a part of this RFP. The Campus will also include four Mental Health Rehabilitation Centers (MHRC's) run by other organizations that are not the focus of this RFP. The Campus already has a Fire Station and Canyon Oaks Youth Center which is a residential therapeutic program for adolescents. The new buildings (four MHRCs and the Campus Center including Co-housing) are currently under construction around an existing MHRC, Cordilleras County Mental Health Facility (Cordilleras), which is still in full operation. The current Cordilleras structure will be demolished once all the new buildings are completed.

B. SCHEDULE**Dates are subject to change*

| | |
|--|--|
| RFP Released | November 14, 2022 |
| Deadline for Questions, Comments and Exceptions | December 5, 2022 |
| Proposers Conference | December 15, 2022, 11:00am – 1:00pm PST RSVP to brjohnson@smcgov.org no later than December 12, 2022 if you plan to attend and to receive a meeting invite emailed directly to you. Or call in (audio only) +1 628-212-0105 , 326208491# United States, San Francisco Phone Conference ID: 326 208 491# |
| Release date for Final Questions & Answers | December 22, 2022 |
| Proposal Due Date and Time | January 27, 2023 |
| Evaluation of Proposals* | February 7, 2023 |
| Interviews (if necessary)* | TBD |
| Notification of Funded Proposals* | February 17, 2023 |
| Protest Deadline* | February 24, 2023 |
| Submission to County Board for approval* | TBD |
| Service Start Date* | TBD |

II. BACKGROUND

The existing structure is approaching end of life as it was originally built to be a tuberculosis hospital for San Mateo County and opened in the early 1950's. It later closed in the 1960's and was repurposed and opened as an IMD (Institution for Mental Diseases)/MHRC in the 1970's as a result of the mutual efforts of Alliance on Mental Illness of San Mateo (now known as the National Alliance on Mental Illness (NAMI) of San Mateo) and San Mateo County Mental Health Services (now known as San Mateo County Behavioral Health and Recovery Services).

In 2013, the San Mateo County Board of Supervisors decided that it was time to replace this aging building which provided one of the County's most important resources in the continuum of care for its most vulnerable mentally ill residents. They authorized funding to commission a study to explore options. The San Mateo County Public Works Department (DPW) and the San Mateo County Health System, Behavioral Health and Recovery Services collaborated in this effort and hired an architectural firm to guide the County through a feasibility study. The modeling for the new campus and the MHRC's came about through a feasibility study that included gathering information from consumers, their families, staff, other providers and members of the community. The outcome of this study was the creation of a new campus containing the housing that is the focus of this RFP as well as multiple programs and levels of care that will be a place for consumer wellness, rehabilitation and recovery that leverages every aspect of the built and natural environment, the best practices for treatment, and the expertise of providers, family members, consumers and community.

The new campus has been designed to provide a world-class healing and therapeutic environment that is far more homelike and less institutional. This came about from extensive reviews of best clinical practices and campus and building models around the world. Treating people with mental illness in smaller scale, more homelike settings reduce social isolation and creates a more natural environment for healing and social skill training to reduce problems of adjustment and recovery. In a 2008 study, researchers determined that when a facility was perceived to be a safe place, positive therapeutic relationships resulted between consumers and staff, contributing to positive clinical outcomes.

The original feasibility study for creating the new programs also resulted in the creation of the following vision statements and goals which are the guiding principles for the development of all the elements on the new campus:

Focus on Wellness – to be healthy

The new campus will offer programs and services that are dedicated to the whole health and wellness of its consumers. The environment will support and reflect a productive individualized wellness path for all consumers.

Promote Respect – to be livable

The programs and services offered will provide a strong foundation of assuring dignity and respect for its consumers and staff. The programs and services will emphasize consumer's choice, in a safe environment that inspires pride, motivates the spirit, accommodates diversity in culture and beliefs, instills optimism for personal growth and improves quality of life.

Build Community – to be collaborative

The programs and services offered at the new campus will build strong communities – amongst their own consumers, families, staff, and visitors, and add value to the surrounding community. The campus community will become an integral part of its social surroundings, with its programs and services valued as innovative assets and its residents respected as citizens.

Heal through Nature – to be environmentally conscious

The programs and services offered at the new campus will capitalize on the beautiful serene natural setting to complement the process of wellness, rehabilitation and recovery. The new facilities will incorporate progressive sustainable design strategies, efficient building systems, and natural materials to the benefit of healthy people, place, and planet.

Strive for Recovery – to flourish

The programs and services will help consumers realize their full potential, achieving their goals for recovery, and return to living independently in the community. We will develop a world class

model of care that sets a new standard for excellence, by drawing from current best practices and anticipating future advances in behavioral health care.

III. CO-HOUSING DESCRIPTION

This is an exciting opportunity for two organizations to pool their talents in order to work collaboratively together to operate an innovative Co-Housing program on the future Cordilleras Campus in San Mateo County. One organization will provide the Property Management services and the other will provide the Support Services.

BHRS envisions the Co-Housing program to be a supported living environment with permanent supported housing units and transitional housing that encourages independent daily living skills development and tenant involvement in daily activities including housing keeping, cooking, decision making about many aspects of the living environment, community building among tenants and participation in on site activities of interest. Potential tenants will be identified and referred to the Property Management and Support Services by BHRS. Tenants will be required to pay 30% of their income for rent.

Co-Housing will consist of two service levels. One level will be transitional housing for 29 individuals, with a maximum stay of will be 24 months. These services will focus on independent living skill development, understanding of tenant rights, responsibilities and how to model good tenant behavior and tenant engagement in a variety of activities leading to successful transition into permanent housing. The second program level will be permanent supportive housing for 28 individuals, which will have no limit on the length of stay. The goal will be successful housing retention through further skill development, good tenant behavior and participation in activities of interest.

BHRS is looking for two organizations to partner together to run the Co-Housing program. One organization will provide the Property Management services and the other organization will provide the Support Services. Two organizations will submit a joint proposal that identifies each other as partners and that addresses both service components. The Property Management organization must be

capable of managing a county owned co-housing development that will have both transitional and permanent supportive housing for individuals with serious mental illness and co-occurring substance use disorders and have related experience. The Support Services Provider organizations must have prior experience working with the target population in a similar capacity. The same organization cannot provide both services. In addition, due to Federal and State restrictions, the Property Management organization cannot also run one of the MHRC's on the new campus. The Support Service Provider organization would be eligible to additionally run an MHRC on the same campus should they be selected for such, however, there can be no overlap in staffing of any sort with any MHRC on the Cordilleras campus.

IV. SCOPE OF WORK

A. Property Management

Property Management Provider responsibilities will include but not limited to the following:

1. Participate in a lease up process with the BHRM Program Manager, and for notifying BHRM of any future vacancies.
2. Develop a client lease for permanent supported housing, developing a client housing agreement for transitional housing, and developing house rules for both transitional housing and permanent supported housing areas.
3. Determine tenant rent on an annual basis. Collect scheduled rents and keep required records and documentation associated with rents.
4. Daily housekeeping services that includes cleaning of common areas.
5. Monitor utilization and functioning of all appliances and equipment.
6. Monitor tenant conduct as it relates to lease requirements and tenancy success.
7. Collaborate with the Support Service Provider on housing retention and daily living skills development including tenant involvement in daily cleaning/upkeep of living space, establishing house rules and use of common spaces.
8. Develop and maintain a property management plan that includes at a minimum staffing plan and staff training and retention, housing first principles, lease and house rule establishment and procedures, eviction prevention efforts, criteria for eviction and process, and housekeeping.
9. Coordinate building improvement and capital maintenance with DPW.
10. Provide Resident Service Coordinator (RSC) with the duties that include but

not limited to the following:

- a. collaborate with first floor providers and activities leaders to facilitate residents' involvement in first floor and outdoor activities.
- b. plan events and activities for all residents based on interests of the tenant community
- c. convene and co-facilitate a resident council and subcommittee as planned by the council
- d. co-facilitate with Support Service Provider weekly tenant review meetings

11. The Property Manager and RSC will participate with Support Service Provider and BHRS in a monthly operations meeting.

12. Provide a van to use to transport tenants to outings, shopping centers, community activities, etc. This van is intended to provide a drop-off and pick-up shuttle service to and from locations, as needed.

B. Support Service Provider

The Support Service Provider entity will be responsible for working with tenants both in transitional housing and permanent supportive housing.

Support Service Provider staff responsibilities will include but are not limited to the following:

1. Assist tenant with move in process.
2. Provide orientation to tenant and support adjusting to co-housing environment.
3. Provide individualized support to those tenants transitioning from other settings such as locked care with attention to their medication support and nutritional needs: including assisting tenant to develop medication schedule and meal plans.
4. Assess tenant's daily living skills (DLS). Develop plan with tenant activities to educate, model and develop DLS. Observe and coach with tenant in DLS activities.
5. Conduct group DLS skill building activities, as appropriate, which may include menu/meal planning, basic food prep/cooking, shopping and basic money management/budgeting.
6. Assess tenant's need for Rep Payee and coordinate with tenant's treatment team to apply for Rep Payee.

7. Provide assistance in applying for and retaining benefits including Medi-Cal and SSI.
8. Plan and coordinate with resident services coordinator for tenants' activities for education, recreation and social involvement.
9. Coordinate with tenants' clinical team or clinical provider on a regular basis and medical provider as needed.
10. Provide linkage to outside resources to support continued recovery and achievement of personal goals such as In Home Supportive Services, Vocational Rehabilitation Services, supported education and other community supports, as appropriate.
11. Work with tenant on behaviors that promote good tenancy and good neighbor relations.
12. Assess and counsel tenants related to behaviors that may place tenancy at risk.
13. Provide a van to use for transporting/accompanying tenants to health care appointments and structured outings to build/practice client life skills in the areas of socialization, money management, navigation of public transportation, shopping on a budget, etc. For example, the support service provider may transport a group of clients to a grocery store and enter the store with them to help them apply for a store discount card, to show them how to use self-checkout, to coach them on price comparison shopping to stretch their grocery budget or how to read nutrition labels.
14. Provide linkage and coordination with housing locator services as tenants prepare to move into permanent housing.
15. Co-facilitate with RSC Tenant Council and weekly tenant review meeting.
16. Participate in monthly operations meeting with property management, RSC and BHRS to review tenant lease violations, upcoming vacancies or other issues related to housing retention.
17. Coordinate on site groups such as Alcoholics Anonymous, (A.A.), Narcotics Anonymous (N.A.), Treatment Readiness groups and other harm reduction focused groups, NAMI, and peer support groups.
18. Provide crisis identification and follow up on urgent care needs, coordinating with primary case manager.
19. Some of the above services may be claimable to Medi-Cal or other payers as part of the client's treatment plan, and if so the Service Provider will be responsible for coordinating with other members of the client's clinical team regarding such services and documenting them appropriately in

compliance with BHRS guidelines and state and federal requirements in order to maximize state and federal reimbursements.

- C. Target Population The target population are San Mateo County residents who are seriously mentally ill and may have co-occurring substance use disorders and who are eligible for either Transitional Housing or Permanent Supported Housing as determined by BHRS. The individuals may have been homeless, previously institutionalized or at risk of homelessness due to other circumstances. Transitional Housing tenants are tenants who are working towards more independent living. The Permanent Housing tenants may be previous tenants in Transitional Housing from this campus or from some other part of BHRS's network of care. The target population is a culturally, linguistically, ethnically, gender diverse population.
- D. Referrals: All referrals for occupancy of units will be seriously mentally ill residents of San Mateo County and will come from a variety of referral sources. These referral sources will need to refer these individuals to BHRS for official certification as BHRS consumers or eligible consumers. Some of the current residents of the Cordilleras Suites (a residential care facility located at the campus that will no longer exist once the new campus has been completed) may be relocated to one of the two new housing floors if they are determined to be clinically ready to step down from a licensed residential care facility to housing. Future admissions will be 18 years or older and have an income or other financial resources to pay the monthly rent.

Housing First philosophy will be the approach to referrals. Housing First takes a low barrier approach to entry requirements for housing (See Housing First Appendix D). The individuals may have been homeless, previously institutionalized or at risk of homelessness due to other circumstances. Future tenants may be required to be on Rep Payee Services should they have a history of poor money management, especially related to housing. The tenant's treatment team will be responsible for referring to Rep Payee. This can be re-evaluated once their money management skills improve.

- E. Length of Stay: There is no time limit for how long residents may live in the permanent supported housing Units. The residents in the transitional housing units may live there for up to 24 months while they are working towards more permanent housing elsewhere. Tenants may ask BHRS for extensions should they need more time. Extensions will be reviewed on a case-by-case basis and will need BHRS Manager approval. Potential loss of housing (i.e. through eviction, loss of income, violation of tenant agreement, level of care change, etc.) for any tenant must be reviewed by BHRS.
- F. Co-Housing Community Life: We expect the future Property Management and Support Service Providers to present a creative description of how the Co-Housing program will take full advantage of all of the natural surroundings, created activities and experiential opportunities on the new campus and the key tenets of Co-Housing community life. Some examples of community life may include but are not limited to: opportunities and expectations for some common meals, tenant participation on tenant committees, participation in decision making, etc.
- G. Staffing:
Both Property Management and Support Services Provider will describe the staffing model that reflects assignment of staff who have extensive experience, skills and knowledge working with a culturally, linguistically, ethnically and gender diverse severely mentally ill population. Examples of Property Management staffing are property manager, assistant property manager, resident services coordinator, housekeeping and janitorial staff with some presence, 7 days a week. Examples of Support Service Provider staffing are supervisor, case managers, occupational therapist, peer professionals, recovery specialist, etc. Support Services Provider will plan for staff presence 24 hours a day, 7 days a week. There will be office space on each floor for staff. There will not be living accommodations for staff in the building.

H. Training:

Identify staff training needs and provide training and support.

1. Training for both Property Management and Support Service Provider must include the following topics at a minimum:

- a. Confidentiality
- b. HIPAA
- c. Fraud, Waste and Abuse
- d. Cultural humility
- e. Gender sensitivity
- f. How to work with Interpreter (if using interpreter services)
- g. Working with SMI co-occurring tenants
- h. Working with peer workers
- i. Motivational Interviewing

2. Additional training for the Support Service Provider will also include but is not limited to the following:

- a. Critical incident management
- b. Spirituality
- c. Harm reduction
- d. Housing retention skills
- e. Trauma informed care
- f. Co-occurring treatment
- g. Principles of clinical case management
- h. Principles and practices of peer support services
- i. Cognitive behavioral therapy
- j. Crisis intervention and de-escalation
- k. Independent life skills building (including, but not limited to, menu/meal planning, basic food preparation, cleaning, laundry, money management, how to use/access transportation and socialization)

I. Communication/Collaboration Requirements:

1. Regular effective communication and skilled collaborative planning and operations are key components of supportive Co-Housing. Providers will schedule regular meetings internally and with all

potential partners to plan, analyze and design improvements in all collaborative efforts.

2. Property Management will provide a monthly report that includes tenant name, unit number, move in date, move out date, reason for move out and number of days housed. Property Management will notify BHRS Manager or designated staff of any lease violations or eviction notices.
3. Changes to staffing levels in Property Management or Support Service Provider must be reported on a monthly basis, including staff vacancies.
4. Support Service Provider will provide a monthly status report that includes dates of contact with tenants, amount of time involved, who was involved, communication with primary case manager or others, services provided, outcome, and plan or next steps agreed upon.
5. Designated administrator of Property Management entity and Support Service Provider will meet quarterly with Deputy Director of Adult Services to review data and discuss any problems or concerns.
6. Property Management and Support Service Provider shall collaborate with the BHRS Manager to identify tenants who are ready for permanent housing or who may need a higher level of care.
7. The Property Management and Support Service Provider shall meet on a monthly basis and as needed basis with the BHRS designated staff who are responsible for overseeing the contract, the facility and the campus to discuss any safety or other concerns regarding shared campus spaces.
8. Contractors will provide any data reporting requirements that the State of California requires.

- J. Evacuation Plan: Contractors will need to develop and provide an evacuation and temporary shelter plan for any adverse events and/or natural disasters.
- K. Performance Measures:
1. Permanent supportive housing 90% of tenants will remain housed a least 12 months after move in.
 2. Transitional housing: 90 % of tenants will move to permanent housing within 24 months of move in.
 3. Quality of service and housing: 90% of tenants will respond with positive satisfaction with the quality of housing and services provided via a consumer satisfaction survey conducted annually.
- L. Length of Agreement
The anticipated duration of the contracts will be for approximately 3 years, with the agreement terms tentatively to begin September 2023. The initial awarded contracts will be for 3 years, with an option to renew for an additional two (2) years included, pending program evaluation and division approval.
- M. Funding, Claims, and Payment
- Funding**
- a. These contracts may be funded with Federal, State and/or County sources.
 - b. Funding for the Property Management agreement will come primarily from tenants' rents, Realignment, Mental Health Services Act, and Net County Cost funding. Permanent Supportive Housing tenants may also have housing vouchers.
 - c. Funding for the services of the Support Service Provider will come from Realignment, Mental Health Services Act, Net County Cost, and if eligible, Medi-Cal reimbursement and other insurance.

Claims

- a. The Support Service Provider will be expected to submit claims for all Medi-Cal billable services to BHRS in compliance with BHRS and State and Federal guidelines for eligibility and documentation requirements.
- b. Property Management will submit an invoice to BHRS on a monthly basis.

Payment

- a. Basic Services will be paid on a monthly basis, each payment equal to 1/12th of the contract maximum for these services.
- b. Requirements regarding responsibility for participation in audits will be clarified during the contracting process.
- c. The implementation of CalAIM (California Medi-Cal reform) may impact the requirements and manner in which claims, reporting and payments are handled.

V. DESCRIPTION OF CAMPUS CENTER BUILDING

The Campus Center first floor will be comprised of two wings. One wing will house the spiritual center, art center, lactation room, exercise room, primary care rooms, conference room, hoteling space and volunteer area. The other wing will house the front lobby, commercial kitchen, retail store, bed bug elimination room, and engineering/mechanical rooms.

The Co-Housing on the two upper floors of the Campus Center will house 57 residents, each in their own bedroom (Appendix E). 56 of the bedrooms will have a Jack and Jill bathroom, bed, nightstand, desk, refrigerator, chair and a closet for clothes and shelving for food supplies. One bedroom on the transitional housing floor located on the second floor will have a private bedroom with all of the same items in it and its own bathroom.

Each floor will have two living rooms, two computer stations for tenants, a community kitchen where residents can cook their own meals, a dining area with views of the campus, a meditation room, an interview/visitation room, a cleaning supply room, housekeeping room, one leadership office,

two staff offices, and staff restrooms. The third floor will have a storage room in the same spot that the private bedroom/bathroom is on the second floor.

The art center, exercise room, bed bug elimination room and laundry room will be part of the Co-Housing program and will be administered by the Property Manager. In addition to these rooms on the first floor, Property Management will also be responsible for maintaining (and scheduling if needed) oversight of the conference room, hoteling space, restrooms, spiritual center, lactation room, and front lobby. The front lobby will also be staffed by Property Management from 7 a.m. to 7 p.m. seven days a week. The front door will be locked from 7 p.m. to 7 a.m. with a security officer stationed in the front lobby during those hours. The retail store will initially be kept locked until its use can be further developed. This could be a room that will be used by the third-party operator of the commercial kitchen for food distribution for the campus and/or by another entity to sell items that the tenants might need. The use of the retail store will be further developed after the new campus has opened and the future tenants can weigh in. Property Management will not be responsible for the commercial kitchen, the Department of Public Works rooms or the Primary Care rooms.

There will also be shared outdoor spaces that include walkways, a sports court, labyrinth, garden center, art pavilion, kiln building, sitting hut and areas to picnic and sit. The garden center and kiln building will be available for the use of the Co-Housing tenants. The rest of the outdoor amenities are available to the Co-Housing tenants and others (MHRC clients, staff, and visitors) who make use of the campus. Property Management will have responsibility of the oversight of the garden center, kiln building and the sitting hut amenities. Property Management will also be responsible for the trash removal and upkeep on any drinking fountains in common areas in the Campus Center and on the grounds. The majority of these spaces will not be available until several months after the new programs are opened. The old Cordilleras building will need to be removed to make room for these outdoor amenities.

(See Appendix E)

VI. CONSTRUCTION TIMELINE

Construction is currently underway, with completion slated for 2023. We anticipate moving consumers from the current building into the new buildings in the fall of 2023. Each building will be completed and commissioned on a different date.

The consumer move date may change as a result of construction delays. Future contractors will be kept updated on date changes. The final building to be commissioned is the Campus Center with Co-Housing on the top two floors (Bldg. A).

VII. LEASE UP

The lease up process and protocol will be developed by Property Management and BHRS in advance of the building occupancy. All tenant referrals will be made by BHRS. The tenants will likely include consumers who currently live in the Cordilleras Suites. These consumers will need to move into the new building within 10 days of its opening. This movement will be done in a coordinated process with the existing Cordilleras Suites staff and BHRS staff.

VIII. Tasks to Complete Before Opening

Prior to being able to admit consumers to their new programs, contractors will need to do the following:

- a. Take occupancy
- b. Hire and train Staff
- c. Support Services Provider to become Medi-Cal certified through BHRS
- d. Support Services Provider will be expected to use the County's electronic health record to input episode encounter data for BHRS consumers and to view other information for coordination of care and thus will have AVATAR access in San Mateo County Network Services. In addition, they will be expected to provide or enter the units of services for claiming Federal Financial Participation for any Medi-Cal reimbursable services they will provide to Co-Housing tenants in compliance with State requirements and supported by documentation. BHRS and the selected contractor will mutually

agree whether using Avatar for this purpose is preferable to another information system already used by contractor.

- e. Contractors will not be permitted to change locations of architectural or infrastructure features without County approval.
- f. Contractors will need to get approval from the County to replace any worn or broken furniture with something other than the same product or similar model.
- g. Property Manager and Support Service Provider should review their responsibilities listed on the Co-Housing Matrix. (Appendix B)
- h. Support Service Provider will have a van and required licenses to transport tenants to health care appointments and structured outing to build/practice life skills in a community setting.

IX. SUBMISSION REQUIREMENTS

A. Submission Deadline

Proposals must be electronically received by **4:00p.m. PST, on January 27, 2023** via Public Purchase (details below).

Allow sufficient time for the upload to complete by the Due Date and Time. Partial uploads will automatically terminate and proposals will be rejected. The Public Purchase submission time will be the official submission time. The County will not be responsible for and shall not accept proposals that are late due to slow internet connections or for any other failure of the Public Purchase system.

NOTE: The County does not maintain the Public Purchase system and is not liable for site failures or technical problems. To resolve technical issues, contact Public Purchase using the chat portal via link below or email Vendor Support at support@thepublicgroup.com :

http://www.publicpurchase.com/gems/help/mainhelp.html?frame1=public/info.html&frame2=public/info_register.html

Late submissions will not be considered.

B. Pre-submission Registration

Organizations or individuals interested in responding to this solicitation must register online with the County of San Mateo at:

<https://www.publicpurchase.com/gems/register/vendor/register>

It is recommended that organizations complete this registration as soon as possible to allow enough time for it to be processed. Each registration is manually reviewed and approved by Public Purchase and this might take time. The County will not be responsible for and shall not accept proposals that are late due to a failure to register in the Public Purchase system.

C. Submission via Public Purchase

1. Submission of Proposals:

Required documents - each of the following documents should be submitted as separate files following the instructions below:

- a. Letter of Introduction
- b. Minimum Qualifications Checklist
- c. Service Implementation Proposal
- d. Cultural Competence Plan
- e. Policies & Procedures as available
- f. Staff Training Plan
- g. Organizational Team Chart
- h. Resumes as needed
- i. Letters of Support and References
- j. Budget

2. Electronic Submissions

Include the proposer name and the RFP title and number in each filename. Submit proposals via the Public Purchase website, allowing sufficient time for the upload to complete by the Due Date and Time.

Partial uploads will automatically terminate and proposals will be rejected. The Public Purchase submission time will be the official submission time. Contact Public Purchase with technical questions regarding the site. The County will not be responsible for and may not accept proposals that are late due to slow internet connections or for any other failure of the Public Purchase system. Late submissions will not be considered.

3. Conflicts between Certain Requirements

Prior to the submission deadlines and solely relating to a determination of the timeliness of questions, comments, and proposal submissions, information displayed on the Public Purchase site will take precedence in the event of a discrepancy between that information and the information within the solicitation documents. For all other discrepancies, the information in the solicitation documents will take precedence.

4. Format

Documents should be created in the following format:

- a. Text be unjustified (i.e., with a ragged-right margin)
- b. Pages have margins of at least 1" on all sides (excluding headers and footers)
- c. If the proposal is lengthy please include a Table of Content
- d. PDF format is preferred

5. Errors in Proposals

The County will not be liable for any errors in proposals. Proposals may be rejected as unresponsive if they are late, incomplete, missing pages or information, or cannot be opened for any reason. The County may waive minor irregularities but such waiver will not modify any remaining RFP requirements.

D. Technical Proposal (Maximum of 35 Pages)

The maximum page limit for your proposals should be 35 pages, not including attachments. **NOTE:** One (1) page of content is measured as 1-sided letter sized page. Pages that exceed the maximum page limit will not be reviewed or scored.

Agencies interested in responding to this RFP must submit the following information, in the order specified below:

1. Introduction and Executive Summary (up to 1 page)

Submit a letter of introduction and brief executive summary of the proposal. The letter must contain:

- a. Name, title and contact information (email, phone and address) for representative of proposing firm who is responsible for communication related to this RFP
- b. Signature of authorized persons from each organization authorized to obligate organization to perform the commitment contained in the proposal
- c. Submission of the letter will constitute a representation by firm that you are willing and able to perform the commitments contained in the proposal and have not violated the terms of this RFP.

2. Statement of Minimum Qualifications

Describe how the firm meets the minimum qualifications as set forth in Evaluation and Selection Criteria, A - **Minimum Qualifications** of this RFP.

- a. Property Management has 5 years of experience managing properties for low income or extremely low income tenants AND experience working with the SMI population.

- b. Support Service Provider has 3 Years of experience providing housing support and retention services to an SMI population
- c. Support Service Provider has experience as a Medi-Cal certified provider of outpatient services and is eligible to become Medi-Cal certified for the services to be provided through this project.

3. Service Implementation / Project Approach

Describe how you propose to perform the activities in Section II: Scope of Work (SOW). (Property Management and Support Service Provider to answer each question below separately Be detailed in addressing the following questions at minimum:

Describe how you envision operating this program.

- a. Please include innovative ideas, successful ideas and best practices from your experience. What challenges do you anticipate and how you would address them?
- b. What roles would the consumer tenants have?
- c. Why did you select your current proposed partner? Have you partnered together before and, if so, discuss how that went well and what you learned from those experiences?
- d. Describe how your team will work collaboratively with the tenants and others on the campus. Describe your experience with Housing First, its challenges and how you address them.
- e. Note: Describe how challenging situations between tenants will be addressed
- f. Indicate the process of reviewing critical and other challenging events.
- g. Indicate what the program evaluation and improvement plan will be.
- h. Include strategies for housing retention and provide organizational data for track record of success with these strategies, in the Service Implementation Plan.

4. Agency Qualifications

Provide information on your firm's background, history, and qualifications which addresses the following:

Support Service Provider

- a. Experience providing housing retention services to target population, including name of program or project, population and length of time served. Include any Housing retention outcomes.
- b. Skills and knowledge of Support Service Provider staff.
- c. Experience with diverse cultures, languages, gender orientation within the target population.
- d. Experience partnering with housing property management and collaboration with other Support Service Providers including mental health and medical providers, include successes and or challenges in partnering and how you addressed them.
- e. Your experiences with working with local community members when a tenant issue arises in the community.
- f. How you would involve individuals that are diverse ethnically, culturally, linguistically, and gender identification diverse in service planning.
- g. How you manage diverse languages of the tenants served.
- h. How challenging situations between tenants will be addressed.
- i. Indicate the process of reviewing critical and other challenging events.
- j. Indicate what the program evaluation and improvement plan will be.
- k. Include the credentialing process for any staff who need to be credentialed.

Property Management

- a. The previous experiences you have had managing properties servicing target population. Include project or program name, population served and the time corresponding to each.
- b. Skills and knowledge of Property Management staff.
- c. Experience providing resident services coordination and or partnering with a Support Service Provider, successes and or challenges with both.

- d. Experience with local community both in outreach on behalf of tenants and problem solving in response to tenant involvement in the community.
- e. Experience managing housing for the target population that is diverse ethnically, culturally, linguistically, and gender identification diverse. What strategies do you use to create a community of the diverse resident population?
- f. Describe how you manage diverse language needs of the tenants served.

5. Agency Staff Qualifications

Describe Staff(s) qualifications; include attachments (these do not count towards the 35 pages), e.g., organizational chart, team chart, resumes, etc.:

- a. Staffing plan that lists the positions by title, shift, and days of week for property management and Support Service Provider staff.
- b. Job descriptions that include qualifications and duties for each position
- c. Resumes for key leadership
- d. Organizational chart showing reporting relationships
- e. Training program plan for staff, including new employee orientation and ongoing or annual refresher training.
- f. Plan for continuous improvement, including staff recruitment and retention strategies.
- g. Describe staff cultural diversity capability in working with diverse and marginalized populations, including linguistic, cultural, race/ethnicity and sexual orientation and gender identification

6. Letters of Support & References (attachment)

Provide letters of support and at least two references for the property management and two for Support Service Provider. Provide the name, address and telephone number of at least two (2) but no more than three (3) recent tenants (preferably other public agencies).

7. Budget (use attached template)

The County intends to award this contract to the firm that it considers will provide the best overall program services. The County reserves the right to

accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

X. EVALUATION AND SELECTION CRITERIA

A. Minimum Qualifications (MQs)

Any proposal that does not demonstrate that the proposer meets these minimum requirements by the deadline for submittal of proposals will be considered non-responsive and will not be eligible for award of the contract.

Proposer is defined as the prime firm or joint venture that is proposing on this RFP.

Proposers must meet the following Minimum Qualifications:

- a. Property Management has extensive experience managing properties for low income or extremely low income tenants AND experience working with the SMI population.
- b. Support Service Provider has extensive experience providing housing support and retention services to an SMI population.
- c. Support Service Provider has experience as a MediCal certified provider of outpatient services and is eligible to become MediCal certified for the services to be provided through this project.
- d. Property Management has extensive experience managing rental property for extremely low-income individual
- e. Property Management has experience renting to the SMI population
- f. Support Service Provider has extensive experience in supportive housing services with SMI populations.
- g. Proposer is registered and in good standing with sam.gov/SAM/

In order for a firm to pass the minimum qualifications and to be considered for contract award the firm shall be in good standing with Federal Government agencies and the State of California. Firms that have been debarred, suspended, proposed for debarment, declared ineligible by Federal or State agencies will not qualify for contract award.

B. Selection Criteria

The County will establish an evaluation committee of subject matter experts which will evaluate responsive proposals based on the criteria specified in the solicitation. The committee may then recommend the top ranked proposals for final negotiation of contract terms, or may invite proposers for oral presentations and demonstrations, following which those proposers may be allowed to amend their proposals. After evaluating presentation and amended proposals, the committee may recommend the top-ranked proposals for the final negotiation of two separate contracts, for Property Management and Support Services.

1. History and Structure of Proposer

- a. Experience Doing Similar Services
- b. Positive Track Record with the County
- c. Established Community Collaboration
- d. Experience Serving Population

2. Philosophy and Service Model

- a. Articulated Understanding of Program Intent
- b. Philosophy Matches the County's
- c. Service Model Meets the RFP Objectives
- d. Involvement of ethnically, culturally, linguistically, and gender identification diverse individuals in Service Planning

3. Staffing Patterns and Training

- a. Staffing sufficient to provide services.
- b. Does Staff Have Diverse Language Capabilities or are Interpreter Services Available
- c. Can workflow be maintained in the event of a staffing shortage.
- d. Is There a Training Program That Meets Minimum Requirements
- e. Resumes of Key Staff Provided
- f. Defined Process to Credential Staff.

4. Cultural Humility

- a. Culturally responsive, trauma-informed, and alternative models of care are embedded in the proposed service model
- b. A Cultural Competence Plan and/or other relevant documents were included to ensure that services and staff reflect the core values and principles of the FSP Wraparound model.
- c. Are there other areas of strength, in serving culturally diverse populations?

5. Customer Service

- a. Is there a plan Regarding How Issues Between and/or With Tenants Will Be Resolved
- b. Is There a Plan Regarding How Tenant Issues With the Neighboring Community Will be Resolved?
- c. Have there been any claims or violations against the provider

6. Quality Improvement/Program Evaluation

- a. Is there a program evaluation and improvement plan included
- b. Is there an ongoing credentialing process for licensed staff

7. References

- a. References are relevant to the services being provided
- b. References are diverse (e.g., peers, families, community agencies, County agencies, etc.)

8. Budget

- a. Is there a detailed explanation of the service costs and are those costs realistic.
- b. Are there any gaps in the budget.
- c. Does the budget include other funding
- d. Was there a copy of their most recent audit included
- e. Is the budget over the RFP stated amount

XI. INSTRUCTIONS TO PROPOSERS

A. Pre-Proposal Conference

Proposers are encouraged to attend a pre-proposal conference on **December 15, 2022**, at **11:00 a.m. to 1:00 p.m.** RSVP to brjohnson@smcgov.org no later than

December 12, 2022 if you plan to attend and to receive a meeting invite emailed directly to you. Or call in (audio only) [+1 628-212-0105](tel:+16282120105), [326208491#](tel:+16282120105326208491#)

United States, San Francisco

Phone Conference ID: 326 208 491#

B. Communications

As of the issuance date of this RFP and continuing until it is canceled or an award is made, no proposer or person acting on behalf of a prospective proposer may discuss any matter relating to the RFP with any officer, agent, or employee of the County, other than through Public Purchase, to the Authorized Contact Person, or as outlined in the evaluation or protest procedures.

Proposers may not agree to pay any consideration to any company or person to influence the award of a Contract by the County, nor engage in behavior that may be reasonably construed by the public as having the effect or intent of influencing the award of a Contract.

The above restriction does not apply to communications with the County regarding business not related to this RFP.

C. Contract Award

1. Award Procedure

Contract negotiations are neither an offer nor an implicit guarantee that a contract will be executed. Award, if made, will be to the responsive, responsible proposer offering the overall best value to the County for the services and goods described in this solicitation, or as applicable, for a specific portion of the services and goods described. Any agreement reached will be memorialized in a formal agreement using the attached Standard Agreement template.

2. Notice of Intent to Award

Once a decision has been made to award a contract to one or more proposers, the County will post a Notice of Intent to Award, notifying the

remaining proposers of their non-selection. The posting may be inclusion of the recommendation to award as an agenda item on the Board of Supervisors schedule.

3. Commencement of Performance

After all parties have signed the Agreement, the County will notify the proposer and performance may proceed. Prior to County execution of the Agreement, no County employee may authorize work. Any work performed prior to that time may be uncompensated.

XII. TERMS AND CONDITIONS FOR RECIPIENT OF PROPOSALS

A. Errors, Omissions and Inquiries regarding the RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the Department, in Public Purchase, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the Department promptly after discovery, but in no event later than five (5) working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

Inquiries regarding the RFP should be lodged in Public Purchase.

B. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten (10) calendar days after the RFP is issued, provide written notice to the Department setting forth with specific grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

C. Addenda

The County may modify the RFP, prior to the proposal due date, by issuing Addenda, which will be posted on Public Purchase. The proposer shall be responsible for ensuring that its proposal reflects any and all Addenda issued by

the County prior to the proposal due date regardless of when the proposal is submitted. Therefore, the County recommends that the proposer consult Public Purchase frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Addenda.

D. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for the duration of the contract and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

E. Revision of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.

The County may cancel, revise, or reissue this RFP, in whole or in part, for any reason. Revisions will be posted as addenda on <http://www.publicpurchase.com/>. No other revision of this RFP will be valid. Proposers are responsible for ensuring that they have received all addenda from Public Purchase.

F. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the proposer from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

G. Withdrawal of Proposals

Proposals may be withdrawn, modified, or replaced at any time prior to the Due Date and Time. After that time, whether or not a new RFP is issued for the same subject matter, withdrawal of a proposal may preclude the proposer from participating in the procurement as a proposer or subcontractor, except that an original equipment manufacturer may participate indirectly through a reseller.

H. No Commitment

Neither submission of a proposal nor the County's receipt of proposal materials confers any right to the proposer nor any obligation on the County. This RFP does not commit the County to award a Contract, nor will the County defray any costs incurred in preparing proposals or participating in any presentations or negotiations.

I. Financial Responsibility

The County accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the County and may be used by the County in any way deemed appropriate.

J. Estimated Quantity

If the RFP results in an indefinite quantity or a requirements Contract, the goods and services actually requested by the County may be less than the maximum value of the Contract and there is no guarantee, either expressed or implied, as to the actual quantity of goods and services that will be authorized under the Contract.

K. Public Record

1. General

- 1.1 All proposals, protests, and information submitted in response to this solicitation will become the property of the County and will be

considered public records. As such, they may be subject to public review.

1.2 Any contract arising from this RFP will be a public record.

1.3 Submission of any materials in response to this RFP constitutes:

- Consent to the County's release of such materials under the Public Records Act without notice to the person or entity submitting the materials; and
- Waiver of all claims against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal or materials to be inspected; and
- Agreement to indemnify and hold harmless the County for release of such information under the Public Records Act; and
- Acknowledgement that the County will not assert any privileges that may exist on behalf of the person or entity submitting the materials.

2. Confidential Information

2.1 The County is not seeking proprietary information and will not assert any privileges that may exist on behalf of the proposer. Proposers are responsible for asserting any applicable privileges or reasons why a document should not be produced in response to a public record request.

2.2 If submitting information protected from disclosure as a trade secret or any other basis, identify each page of such material subject to protection as "CONFIDENTIAL". If requested material has been designated as confidential, the County will attempt to inform the proposer of the public records request in a timely manner to permit assertion of any applicable privileges.

2.3 Failure to seek a court order protecting information from disclosure within ten days of the County's notice of a request to the proposer will be deemed agreement to disclosure of the information and the

proposer agrees to indemnify and hold the County harmless for release of such information.

2.4 Requests to treat an entire proposal as confidential will be rejected and deemed agreement to County disclosure of the entire proposal and the proposer agrees to indemnify and hold the County harmless for release of any information requested.

2.5 Trade secrets will only be considered confidential if claimed to be a trade secret when submitted to the County, marked as confidential, and compliant with Government Code Section 6254.7.

L. Reservations of Rights by the County

The issuance of this RFP does not constitute an agreement by the County that any contract will actually be entered into by the County. The County expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all proposals;
- Reissue a Request for Proposals;
- Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any materials, equipment or services specified in this RFP by any other means; or
- Determine that no project will be pursued.

M. No Waiver

No waiver by the County of any provision of this RFP shall be implied from any failure by the County to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

N. Cooperative Agreement (Piggyback)

Any contract/s that will result from this competitive solicitation is being conducted as a Cooperative Procurement. The services, terms and conditions of the resulting contract may be used by other organizations as a Cooperative Agreement.

This clause in no way commits any SMC affiliate to procure services from the awarded contractor, nor does it guarantee any additional orders will result. , It does allow interested organizations, at their discretion, to make use of this competitive procurement (provided said process satisfies their own procurement guidelines) and contract directly from the awarded contractor. All purchases made by SMC affiliates shall be understood to be transactions between that organization and the awarded contractor; SMC shall not be responsible for any such contracts.

XIII. PROTEST PROCENDURES

A. Protest of Non-Responsiveness Determination

Within five (5) working days of the County's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the County has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day following the County's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

B. Protest of Contract Award

Within five (5) working days of the County's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the County has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the County on or before the fifth working day after the County's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the County to determine the validity of the protest.

C. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the

County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

BrJohnson@smcgov.org

Subject: CO-Housing 2022-002

Appendix A – Minimum Qualifications Checklist

Complete this form and attach it to your firm's Proposal

I, Insert Name, am a Insert Title at Insert Firm and am authorized to execute this Certification on its behalf.

Minimum Qualifications

Proposals will be accepted only from firms that meet the following required qualifications:

Please check box if your firm meets these qualifications:

- Property management has 5 years of experience managing properties for low income or extremely low income tenants AND experience working with the SMI population.
- Support Service Provider has 3 Years of experience providing housing support and retention services to an SMI population
- Support Service Provider has experience as a MediCal certified provider of outpatient services and is eligible to become MediCal certified for the services to be provided through this project.

Please check box if your firm can provide this additional service:

- Ability to provide Controlled Substance Prescription Forms

Required Registration

Please check box to indicate your firm is registered with the System for Award Management (SAM).

Proposer is required to be in good standing with <https://sam.gov/SAM/>

- Registered as Business Name

DUNS No. Business Number:

I certify that the foregoing information is true and correct as of the date of this Certificate.

Signature: _____

Date: Click or tap to enter a date.

CO-HOUSING RESPONSIBILITY MATRIX

| Item: | Description: | Procure/Fabricate/Deliver/Install Resp: | Warranty Resp: | Post Warranty Resp. | Notes: |
|--------------------------------|--|---|-----------------------|---------------------|--------|
| Building Equipment | | | | | |
| | Elevators | Skanska | Skanska | DPW | |
| | Cathodic Protection System | Skanska | Skanska | DPW | |
| | Roof Top Equipment | Skanska | Skanska | DPW | |
| | Door Hardware Interior | Skanska | Skanska | DPW | |
| | Door Hardware Exterior | Skanska | Skanska | DPW | |
| | Kitchen Equipment - Production Kitchen (See Equipment Schedule) | Skanska | Skanska | Vendor | |
| | Kitchen Equipment - Kitchensettes (See Equipment Schedule) | Skanska | Skanska | Vendor | |
| | Fire Suppression System | Skanska | Skanska | DPW | |
| | Fire Alarm System | Skanska | Skanska | DPW | |
| | Stove | Skanska | Skanska | Vendor | |
| | Microwave Oven | Skanska | Skanska | Vendor | |
| | Refrigerator | Skanska | Skanska | Vendor | |
| | Keying 1st Floor (County Area) | Skanska provides temp cores, | DPW | DPW | |
| | Keying 1st, 2nd & 3rd Floor (Vendor Areas) | Skanska provides temp cores | Vendor | Vendor | |
| | Medical Examine Table | PDU w/ One Work Place | PDU w/ One Work Place | Vendor | |
| | Beds & Pads | PDU w/ One Work Place | PDU w/ One Work Place | Vendor | |
| | Exercise Equipment | PDU w/ One Work Place | PDU w/ One Work Place | Vendor | |
| | Office Cubes, Desks, Furniture, Chairs, File Cabinets | PDU w/ One Work Place | PDU w/ One Work Place | Vendor | |
| HVAC/Plumbing Equipment | | | | | |
| | HVAC System | Skanska | Skanska | DPW | |
| | BMS System | Skanska | Skanska | DPW | |
| | Water Heater | Skanska | Skanska | DPW | |
| | Plumbing Fixtures (Toilets, Sinks, Showers, Facets) | Skanska | Skanska | DPW | |
| | Monthly Water Services | Vendor | Vendor | Vendor | |
| Electrical Equipment | | | | | |
| | Low Voltage Transformers | Skanska | Skanska | DPW | |
| | Low Voltage Transformers | Skanska | Skanska | DPW | |
| | Lighting Control System | Skanska | Skanska | DPW | |
| | Photovoltaic System | Four Front & Sage | Four Front & Sage | Four Front / DPW | |
| | Light Fixtures | Skanska | Skanska | DPW | |
| | Monthly Electrical Services | Vendor | Vendor | Vendor | |
| IT Equipment | | | | | |
| | Network Equipment (Client Areas 1st, 2nd & 3rd Floors) | Vendor | Vendor | Vendor | |
| | Network Equipment (County Area 1st Floor) | ISD | ISD | ISD | |
| | Wireless Access Points (Client Areas 1st, 2nd & 3rd Floors) | Vendor | Vendor | Vendor | |
| | Wireless Access Points (County Area 1st Floor) | ISD | ISD | ISD | |
| | Computers (Client Areas 1st, 2nd & 3rd Floors) | Vendor | Vendor | Vendor | |
| | Computers (County Area 1st Floor) | ISD | ISD | ISD | |
| | Phones (Client Area 1st, 2nd & 3rd Floors) | Vendor | Vendor | Vendor | |
| | Phones (County Area 1st Floor) | ISD | ISD | ISD | |
| | AV Equip. (TV's, Speakers, etc.) | Vendor | Vendor | Vendor | |
| | Internet & Phone Utility Services (Client Areas 1st, 2nd & 3rd Floors) | Vendor | Vendor | Vendor | |
| | Internet & Phone Utility Services (County Area 1st Floor) | ISD | ISD | ISD | |
| | HMI Security Control System | Skanska | Skanska | Vendor | |
| | Access control system | Skanska | Skanska | Vendor | |
| | Security Cameras | Skanska | Skanska | Vendor | |
| | Site Security Camera (Vendor Resp. on 1st floor) | Skanska | Skanska | Vendor | |
| | Intercom System | Skanska | Skanska | Vendor | |
| | Security Network | Skanska | Skanska | Vendor | |
| | DAS | Skanska | Skanska | DPW | |

***MHRC Occupants will need to move in during 15day move phase

***Vendors need to clarify if San Mateo County Network Services will be required in their MHRC

***Indicate on RFP that there is no changing locations of arch or infrastructure features without County approval

Appendix C: Budget Worksheet

| San Mateo County Behavioral Health and Recovery Services Budget Worksheet | | | | Yr. 1 | Yr 2 | Yr 3 |
|---|--|--|--|--------------|--------------|--------------|
| A. Expenditures | | | | | | |
| 1. Personnel Expenditures | | | | | | |
| a. Employee Salary – list all employees | | | | | | |
| i. Executive Director, salary, % of time | | | | | | |
| ii. Employee 1, title, salary, % of time | | | | | | |
| iii. Employee 2, title, salary, % of time | | | | | | |
| iv. Employee 3, title, salary, % of time | | | | | | |
| b. Subtotal of all salaries | | | | | | |
| c. Employee Benefits | | | | | | |
| i. Part time benefits | | | | | | |
| ii. Full time benefits | | | | | | |
| iii. Subtotal of benefits | | | | | | |
| d. Subtotal Personnel Expenditures | | | | | | |
| 2. Operating Expenditures | | | | | | |
| a. Rent | | | | | | |
| b. Utilities | | | | | | |
| c. Administrative Expense | | | | | | |
| i. General Office Supplies (paper, toner, postage, etc.) | | | | | | |
| ii. Janitorial | | | | | | |
| iii. Bookkeeping/Accounting | | | | | | |
| iv. Staff development (training, conferences, meetings) | | | | | | |
| v. Insurance | | | | | | |
| vi. Equipment maintenance | | | | | | |
| vii. Other - describe | | | | | | |
| viii. Other - describe | | | | | | |
| ix. Other - describe | | | | | | |
| x. Other - describe | | | | | | |
| d. Telephone, cell phones, fax, voicemail | | | | | | |
| e. Web/internet (if applicable) | | | | | | |
| f. Other operating expenses – describe in budget narrative | | | | | | |
| g. Subtotal Operating Expenditures | | | | | | |
| B. Revenues – if applicable | | | | Yr. 1 | Yr. 2 | Yr. 3 |
| a. Grants | | | | | | |
| b. Donations | | | | | | |
| c. Other Revenue | | | | | | |
| Total Revenues | | | | | | |
| C. Start-Up Costs (describe in budget narrative) | | | | | | |
| a. | | | | | | |
| b. | | | | | | |
| c. | | | | | | |
| d. Subtotal One-Time Start-Up Costs | | | | | N/A | N/A |
| D. Total Proposed Operational Budget | | | | | | |

APPENDIX D

HOUSING FIRST

Cordilleras Co-Housing will follow the guiding principles of Housing First. The principles listed below have been adapted from State of California statute SB1380.

Core components of Housing First” means all of the following:

- (1) Tenant screening and selection practices that promote accepting applicants regardless of their sobriety or use of substances, completion of treatment, or participation in services.
- (2) Applicants are not rejected on the basis of poor credit or financial history, poor or lack of rental history, criminal convictions unrelated to tenancy, or behaviors that indicate a lack of “housing readiness.”
- (3) BHRS may accept referrals of the target population directly from shelters, street outreach, drop-in centers, and other parts of crisis response systems frequented by vulnerable people experiencing homelessness.
- (4) Supportive services that emphasize engagement and problem solving over therapeutic goals and service plans that are highly tenant-driven without predetermined goals.
- (5) Participation in services or program compliance is not a condition of permanent housing tenancy.
- (6) Permanent Supportive Housing (PSH) Tenants have a lease and all the rights and responsibilities of tenancy, as outlined in California’s Civil, Health and Safety, and Government codes.
- (7) The use of alcohol or drugs in and of itself, without other lease violations, is not a reason for eviction.
- (8) In communities with coordinated assessment and entry systems (CES), incentives for funding promote tenant selection plans for supportive housing that prioritize eligible tenants based on criteria other than “first-come-first-serve,” including, but not limited to, the duration or chronicity of homelessness, vulnerability to early mortality, or high utilization of crisis services. Prioritization may include triage tools, developed through local data, to identify high-cost, high-need homeless residents. BHRS will accept referrals of the target population from the local CES
- (9) Case managers and service coordinators who are trained in and actively employ evidence-based practices for client engagement, including, but not limited to, motivational interviewing and client-centered counseling.

(10) Services are informed by a harm-reduction philosophy that recognizes drug and alcohol use and addiction as a part of tenants' lives, where tenants are engaged in nonjudgmental communication regarding drug and alcohol use, and where tenants are offered education regarding how to avoid risky behaviors and engage in safer practices, as well as connected to evidence-based treatment if the tenant so chooses.

(11) The project and specific apartment may include special physical features that accommodate disabilities, reduce harm, and promote health and community and independence among tenants.

(12) Because referred applicants have disabilities, trauma, and difficult circumstances associated with experiences of homelessness, housing provider will proactively identify issues that could impact the application approval.

(13) Each applicant is afforded the right to a reasonable accommodation in all phases of the application process, ongoing tenancy and as a last resort to disqualification.