

Independent Living BC  
*A Housing for Health Partnership*

Call for Expressions Of Interest  
to  
Non-Profit Societies

Interior Health Authority

April 16, 2003

**BC Housing &  
Interior Health Authority**

**Call for Expressions Of Interest  
Interior Health-EOI-CO-#01**

April 16, 2003

**Closing Date and Time:**

Proposals must be received by **2:00 p.m.** Pacific Daylight Time on **June 27, 2003.**

**Closing Location:**

BC Housing  
Attention: Co-ordinator, Program Implementation  
EOI for *Independent Living BC* IHA-EOI-CO-#01  
Suite 601 - 4555 Kingsway  
Burnaby BC V5H 4V8

**Contact:**

Ashley Chester

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## **I. INTRODUCTION**

*Independent Living BC* (the “Program”) is part of the government of British Columbia’s *New Era* commitment to add 5,000 additional community care spaces across the province by 2006. The Program objective is to provide affordable housing and services to help seniors and people with disabilities (the “Tenants”) maintain the independence they desire.

*Independent Living BC* is a partnership among British Columbia Housing Management Commission (“BC Housing”), the Ministry of Health Services (MHS) and the five regional health authorities of British Columbia.

Canada Mortgage and Housing Corporation, an agency of the federal government, is also a funding partner through the Canada-British Columbia Affordable Housing Agreement.

## **II. CALL FOR EXPRESSIONS OF INTEREST TO NON-PROFIT SOCIETIES**

BC Housing and the Interior Health Authority (“Interior Health”) invite non-profit societies to submit Expressions Of Interest (the “EOI Submission”) to convert existing residential care facilities, whose primary risk is that the facility design does not meet requirements for high and complex care, in the following communities into housing and to operate the renovated developments as assisted living:

- Grand Forks - Boundary Lodge
- Penticton - Penticton Retirement Centre

In this Call for Expressions Of Interest (the “EOI”), BC Housing and Interior Health are requesting submissions from non-profit societies only.

(In addition to these two buildings being made available through an open call, Interior Health has agreed that a non-profit society which has been selected through a community development process in Nakusp will be invited to make a submission with respect to the conversion of Halcyon Lodge.)

### III. BASIC PROGRAM REQUIREMENTS

The Program's detailed requirements are contained in *Independent Living BC Program Guidelines for Non-Profit Societies* (the "Program Guidelines") and *Independent Living BC Non-Profit Housing Design and Construction Standards* (the "Design and Construction Standards").

These documents can be found at [www.bchousing.org/Supp\\_Liv/](http://www.bchousing.org/Supp_Liv/)

For paper copies, please contact:

Robbin Benson  
Development Services Branch  
BC Housing  
Phone: 604-439-4761 or 1-800-257-7756, ext. 4761  
E-mail: [rbenson@bchousing.org](mailto:rbenson@bchousing.org)

This call for Expressions Of Interest document must be read in conjunction with the *Program Guidelines* and the *Design and Construction Standards*. What follows is only a summary of the Program.

All Tenants for assisted living units funded through *Independent Living BC* will be selected and referred for tenancy by Interior Health and will require both hospitality and personal care services.

Projects funded through *Independent Living BC* will incorporate the following elements:

- self-contained rental housing which provides the Tenants privacy and the ability to exercise their independence as they are able;
- hospitality services (two meals daily, housekeeping, laundry service, social and recreational opportunities, and 24 hour a day response);
- personal care services for the activities of daily living according to the needs of the Tenants; and
- financial assistance from BC Housing and Interior Health to make both the housing, hospitality and personal care services affordable for lower income Tenants.

Personal care services – a key Program feature - is the provision of services to help with activities of daily living including assistance with bathing, dressing, mobility, and medication reminders.

Tenants will be seniors and adults with disabilities who are able to direct their own care and whose health will be better managed by support and care within a community setting rather than within a residential care setting.

People who are able to self direct their own care are cognitively capable of making decisions, can communicate effectively, have the ability to make informed, voluntary decisions regarding care requirements, and participate in the development of their care plan. They are able to use the response system and take direction in an emergency situation.

#### **IV. THE ASSISTANCE AVAILABLE**

Tenants will pay a maximum of 70% of their after-tax income for the accommodation and services they require. Many Tenants will have minimal monthly incomes, often the basic federal and British Columbia government pensions of Old Age Security (OAS), the Guaranteed Income Supplement (GIS), and the Seniors Supplement, totaling approximately \$1020 monthly.

BC Housing and Interior Health will provide assistance to bridge the gap between what the Tenants will pay and the Society's breakeven costs.

Interior Health will fund the difference between what Tenants can contribute to the service package (hospitality and personal care services) and what the agreed-to costs are.

In addition to this operating assistance, Interior Health is offering to contribute the land and buildings in the locations listed above at a nominal amount through a lease to societies for conversion to assisted living.

BC Housing will provide both capital and operating assistance for the housing base.

The assistance with the capital costs includes a grant of up to \$25,000 per unit from the government of Canada, through BC Housing's partnership with Canada Housing and Mortgage Corporation under the Canada-BC Affordable Housing Agreement. BC Housing will also provide interim mortgage financing and arrange mortgage insurance and takeout mortgages for those qualifying Projects that require capital cost loans.

The on-going housing operating assistance will fund the difference between what the Tenant can contribute to the housing and what the agreed-to costs are.

## V. CONTEXT FOR PROGRAM ALLOCATION IN INTERIOR HEALTH

BC Housing and Interior Health want to develop a total of 500 housing units through the non-profit component of *Independent Living BC*. Before proceeding to an open call for Expressions Of Interest, Interior Health wants to identify any interest among non-profit societies in exploring the potential for converting residential care facilities, now owned by Interior Health, into assisted living.

Interior Health is prepared to make the sites and buildings listed below available to qualified non-profit societies through a 30-year premises lease for a nominal rent, free and clear of pre-existing financial encumbrances. The societies which make successful EOI submissions and are able to develop them into feasible detailed proposals, will receive funding assistance through *Independent Living BC* for the number of assisted living units specified:

- **Grand Forks (Boundary Lodge):** 17 units
- **Penticton (Penticton Retirement Centre):** 23 units

### Transition from Existing Clients

The renovation of these buildings must occur such that the disruption to existing clients is avoided. Care plans for transition of clients will be consistent with Interior Health Home and Community Care Values and Principles. Schedules for renovation must be flexible and take into account the emotional and health needs of the current residents. Such flexibility can be demonstrated by working on self-contained modules within the larger building, or delaying renovation to allow for the resident to enjoy a stable care environment. The planning of the schedule of renovation will be a joint responsibility between Interior Health, BC Housing, and the Society. However, if a renovation schedule negatively impacts on a client's care or care plan, the renovation schedule will be altered.

### Program Delivery

The Interior Health prefers submissions which include the provision by the Society of the required personal care services; however, Interior Health will consider submissions which include the provision of the housing base and hospitality services by the Society and require that Interior Health organize the personal care services.

For more information on Interior Health's approach to Independent Living, please visit Interior Health's Web site at [www.interiorhealth.ca](http://www.interiorhealth.ca)

## VI. EOI AND FUNDING ALLOCATION PROCESS

The funding allocation process has the following stages:

- **EOI Stage.** The call for Expressions Of Interest is issued and interested societies submit their qualifications, their Project concept, and draft budgets. BC Housing and Interior Health evaluate the submissions received. Societies with the most promising submissions (based upon established criteria) are asked to make detailed proposals (the “RFP” stage).
- **RFP Stage.** The societies which have been asked to develop their concepts into detailed proposals will do so within a set timeline. In this stage, BC Housing will share some of the risk with the chosen societies by making Proposal Development Funding (the “PDF”) available to them.
- **Final Evaluation and Project Commitment Stage.** Detailed proposals are reviewed by BC Housing and Interior Health to confirm that the potential in the EOI submissions has been realized with respect to the quality and cost of both the housing base and service delivery plan.

### Project Commitment Conditions

BC Housing has standard Project Commitment conditions listed in the *Program Guidelines*, essentially confirmation of design and both capital and operating budgets.

Interior Health will require that the following conditions be satisfied in the RFP stage before Project Commitment can be granted:

1. Hospitality services: a detailed, confirmed first year operating budget, job descriptions for hospitality staff.
2. Personal care services: a detailed, confirmed first year operating budget, job descriptions for personal care staff and a complete staffing schedule for a full week.
3. A detailed commissioning plan and schedule.

The final evaluation determines if BC Housing and Interior Health will commit funding to complete the Project and enter into the necessary operating agreements with the societies.

#### **NOTE:**

**BC Housing and Interior Health reserve the right at their sole discretion to cancel this EOI and to not ask any of the societies which respond to develop a detailed proposal. Societies are solely responsible for their own costs and expenses in preparing or presenting their EOI submission. Neither BC Housing nor Interior Health is liable to pay such costs and expenses nor to reimburse or compensate a society under any circumstances.**

## **VII. EVALUATION AND SELECTION**

The selection of a successful Society will be based on information from the Society's submission and, if the submission has reasonable potential, through an interview with Society representatives.

The evaluation of EOI submissions will be done by a team with representation from BC Housing and Interior Health.

The evaluation will include the following:

- An initial review will ensure that the mandatory requirements of the EOI have been met, that the submission is complete, and that the Project has a reasonable chance of success.
- If the above criteria are met, evaluators will interview the Society's representatives, and rank the submission.
- The evaluation team will identify the particular tasks which the societies with the highest ranking need to fulfil in order to respond successfully to an RFP.

Within the parameters of Interior Health targets, those societies showing the best potential and strong indicators of success will be asked to develop a detailed proposal. In some instances, they may be asked to address major issues prior to developing their proposals fully.

## VIII. SUBMISSION REQUIREMENTS

### Number of Copies, Closing Date and Location

**Four copies of the submission must be submitted**, two in bound form and two in unbound form to facilitate easy reproduction. All four copies should be submitted in one package clearly addressed as follows:

BC Housing  
Attention: Co-ordinator, Program Implementation  
EOI for *Independent Living BC* IHA-EOI-CO-#01  
Suite 601 - 4555 Kingsway  
Burnaby BC V5H 4V8

The deadline for receipt of submissions at the above address is **2:00 p.m. Pacific Daylight Time on Friday, June 27, 2003.**

**Submissions submitted by e-mail or facsimile will NOT be accepted.**

### Mandatory Information Meetings and Inquiries

All societies intending to submit a submission in response to this EOI must attend the mandatory meeting for the building for which they intend to make an EOI submission:

**Monday, April 28**  
11:30 a.m.  
Penticton Sandman Hotel  
Skaha Room  
939 Burnaby Avenue West  
Penticton

**Tuesday, April 29**  
9:00 a.m.  
Boundary Hospital  
Board Room  
7649 – 22<sup>nd</sup> Street  
Grand Forks

**NOTE:**

**Out of respect for the present residents and staff, Interior Health requires that societies and their consultants refrain from attempting to enter and inspect the buildings. Drawings of the buildings will be made available at the mandatory meetings.**

Inquiries should be directed by e-mail, fax or post to:

Name: Ashley Chester, Co-ordinator, Program Implementation  
E-mail: [achester@bchousing.org](mailto:achester@bchousing.org)  
Fax: 604-439-4793

**All questions must be made no later than 2:00 p.m. Pacific Daylight Time on Friday, June 13, 2003.**

## Mandatory Requirements

All submissions must meet the following requirements:

- The Society must be an incorporated non-profit society or association – or in the process of incorporation. (For-profit entities are not eligible for this component of *Independent Living BC*.)
- The building proposed (renovation) must meet mandatory criteria as determined by BC Housing. (See the *Design and Construction Standards*.)
- Submissions must be received by 2:00 p.m. Pacific Daylight Time on June 27, 2003:

BC Housing  
Attention: Co-ordinator, Program Implementation  
EOI for *Independent Living* IHA-EOI-CO-#01  
Suite 601 – 4555 Kingsway  
Burnaby BC V5H 4V8

- Four copies of the submission must be submitted, two in bound form and two in unbound form.
- Submissions must use the format on pages 13 to 42 of the EOI.

## Format

Operators are required to provide the information requested in the specified format that can be downloaded for direct input at [www.bchousing.org/Supp\\_Liv/](http://www.bchousing.org/Supp_Liv/)

1. **Summary Information**
2. **Letter of Committal**
3. **Society Capacity**
4. **Project Rationale**
5. **Housing Concept**
6. **Society and Community Equity Contributions**
7. **Capital Budget**
8. **Services Concept**
9. **Operating Budget**
10. **Schedules**