

Independent Living BC

Request for
Expressions Of Interest

Interior Health

February 15, 2006

**BC Housing and
Interior Health**

**Request for Expressions of Interest
IH-EOI-#04**

February 15, 2006

Closing Date and Time:

Proposals must be received by **2:00 p.m. Pacific Standard Time**
on **Tuesday, March 7, 2006.**

Closing Location:

BC Housing
Attention: Manager, Program Development
Request for Expressions of Interest IH-EOI-#04
601 – 4555 Kingsway
Burnaby BC V5H 4V8

Contact:

Ashley Chester
Telephone number: 604-439-4190
Fax number: 604-439-4726
E-mail: achester@bchousing.org

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Request for Expressions Of Interest

Assisted Living Housing and Services

1.0 Introduction

Interior Health and BC Housing (the "Funding Partners") are requesting expressions of interest submissions ("EOI Submission") from qualified parties to provide assisted living for seniors and adults with disabilities (the "Tenants").

This call for Expressions Of Interest ("EOI") is part of the government of British Columbia's commitment to add 5,000 additional community care spaces across the province by the end of 2008.

1.1 Objective

This EOI is open to private-for-profit and non-profit organizations which are capable of delivering assisted living, either singly or in partnership (the "Proponent"). The EOI document is a guide for organizations on how to demonstrate experience, skill, and preparedness in the provision of assisted living in a timely and cost-effective manner.

The objectives of this EOI are:

- To identify opportunities for Interior Health to access assisted living capacity which is now available or will become available for occupancy no later than December 1, 2008 in the Interior Health region;
- To award contracts for the delivery of assisted living in the Interior Health region to meet the needs and timelines in the various communities listed below.

The target communities and the units of assisted living required are:

- Cranbrook, 3 units
- Creston, 2 units
- Fernie, 2 unit
- Kimberley, 2 units

1.2 Process

Proponents are invited to make an EOI Submission which indicates their ability to deliver quality assisted living at a competitive price within a specified schedule.

The EOI Submission must specify the number of units offered, the estimated date of availability, and the estimated price.

The Funding Partners will evaluate all EOI Submissions and will initiate one of the following actions:

- In target communities where multiple EOI Submissions have been received, two or more Proponents may be asked to develop within a set timeframe a firm fixed price Proposal.
- In target communities where only one strong EOI Submission is received, the Funding Partners may enter into direct negotiations with the Proponent.
- In target communities where no viable EOI Submissions are received, the Funding Partners reserve the right to move the targeted units to other communities with strong EOI Submissions or to approach and negotiate directly with assisted living operators who did not respond to the EOI.

2.0 Tenant Profile and Service Requirement

All Tenants receiving assistance through the *Independent Living BC* (“ILBC”) program are referred by the health authority. They will require both hospitality-type services and some personal care. However, they must be able to direct their own care and respond to direction in emergencies.

Please see Appendix A. Tenant Profile and Service Requirements for more detailed information on the Tenants and the services required by ILBC.

3.0 Design Standards

Please refer to the design and construction standards, which indicate mandatory building features for assisted living, Appendix B. Design and Construction Standards for Assisted Living.

While the standard operating agreement will be five years, a longer term will be considered for new construction or renovation of existing building. The Proponent should specify their preferred operating agreement duration, up to a maximum of 10 years.

4.0 The Assistance Available

This call is open to for-profit and non-profit proponents. All Proponents will be judged on the same criteria.

Tenants

The Tenants, many of whom will have gross incomes of approximately \$1,020 per month, will pay no more than 70% of their after tax income for the accommodation and the hospitality services they require. For example, a Tenant with a monthly income of \$1,020 after tax will pay \$714 for their rent, hospitality, and personal care services.

ILBC Financial Support

BC Housing and Interior Health will provide the operator with a subsidy equal to the difference between the operator’s price for each full service assisted living unit (housing, hospitality services, personal care) and what the Tenant pays (70% of their after-tax income).

Financing for Non-Profit Projects

For the purposes of this EOI, non-profit proponents should not assume any financing or mortgage insurance assistance from BC Housing. However, BC Housing reserves the right to negotiate financing with non-profit societies which are identified by the Funding Partners as the preferred Proponent in a community.

BC Housing, as a National Housing Act lender, is able to provide financing only to non-profit organizations prepared to enter into long term operating agreements and accept encumbrances on title restricting use (a Section 219 Covenant and Option To Purchase in favour of BC Housing.)

5.0 Completing the EOI Submission

5.1 Submission Requirements

Resources listed in Appendix C may help Proponents to respond to this EOI. All EOI Submissions must include:

- **Transmittal:** Include a letter of committal. See Appendix D. Letter of Committal.
- **Proponent information:** Identify the legal entity making the EOI Submission and the contact information for the person(s) who are authorized to bind the Proponent.
- **Site:** Identify the project where the assisted living units being offered are or will be located, including the civic address and parcel identifier (PID).
- **Location:** Identify location in the community with respect to distances to all relevant amenities.
- **Units:** Specify the number of units that are being offered by type and size (e.g. studio of approximately 400 sq. ft., one bedroom of 550 sq. ft.).
- **Availability:** Indicate when the units will be available, either a specific date or over a period.
- **Price:** Please use Appendix E. Operating Budget Expense Allocations to provide a breakdown to allow the Funding Partners to determine their share of the financial assistance.
- **Experience with ILBC:** Identify whether any tenants in the project are already being assisted by Interior Health and BC Housing through ILBC or any other program.
- **Other experience:** If the project does not have existing Tenants assisted through ILBC, indicate whether the owner/operator operates other projects which do.
- **Support documentation:** Please provide any existing material used in promotion, marketing, staff orientation or training which illustrates explicitly or implicitly the Proponent's philosophy and details the hospitality and personal care services it makes available. Examples include a vision or mission statement, pamphlets, rate schedules for services, and occupancy or tenancy agreements.
- **References:** Identify the Proponent's key project and management personnel who will be assigned to this specific project and provide references for them.
- **New Projects:** For projects which are not now in operations, include whatever additional information is readily available to facilitate an assessment of the EOI Submission including:
 - Conceptual or design drawings to scale;
 - Verification of the project's status with respect to municipal approval processes; and
 - Staff plan including a staff rotation.

Note:

EOI Submissions which fail to conform to these instructions may be disqualified or rejected. Notwithstanding, the Funding Partners may, at their sole discretion, elect to retain for consideration EOI Submissions which are non-conforming and may waive any irregularity required by these instructions.

If the Funding Partners reject all EOI Submissions, they will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the EOI Submission, loss of anticipated profit in connection with any final contract, or any other matter whatsoever.

Confidentiality

Interior Health and BC Housing are subject to the provision of the Freedom of Information and Protection of Privacy Act (the Act). Proprietary information can be protected under the Act (Section 21) which deems disclosure harmful to business interests of a third party. Please clearly mark only the pages of the EOI submission that fall under this protection with “Confidential”. However, should there be a dispute regarding the protection of this information, the final decision is made by the British Columbia Information and Privacy Commissioner.

5.2 Submission Format

EOI Submissions are required to be submitted as four printed and signed copies, two bound and two unbound. Printed copies will be attached to subsequent Requests For Proposals, letters of offer, and contracts, as a record of the EOI Submission.

5.3 Submission Date and Address

All Expressions Of Interest Submissions in all forms are due no later than **2:00 p.m. Pacific Standard Time on Tuesday, March 7, 2006**. Expressions Of Interest Submissions received at **any** point after this time will **not** be evaluated.

Mailing Address:

BC Housing
Manager, Program Development
601 – 4555 Kingsway
Burnaby BC V5H 4V8

For further updates and information relevant to this EOI, please visit web site www.bchousing.org/programs/proposals/IH

5.4 Submission Requests and Subsequent Contracts

The Funding Partners are not bound to enter into a contract with the Proponent which submits the lowest priced submission or with any Proponent.

The EOI, as submitted, will be included with the contract documents as a reference to the initiation of subsequent contracts.

6.0 Evaluation of Expressions of Interest

The evaluation of the Expression Of Interest Submissions will involve a team comprising representatives of BC Housing and Interior Health.

All EOI Submissions will be reviewed for compliance with mandatory requirements. Proponents whose EOI Submissions show strong promise may be interviewed as part of the evaluation.

For more information on the evaluation process, please see Appendix F. Evaluation.

Proponents are asked to assist Interior Health and BC Housing in maintaining the independence of this evaluation committee in the evaluation process.

For additional information or questions to assist with the EOI submission, please contact:

Ashley Chester
Manager, Program Implementation, BC Housing

by e-mail at achester@bchousing.org

or

by fax to 1-604-439-4726

NOTE:

BC Housing and Interior Health reserve the right at their sole discretion to cancel this Request for Expressions Of Interest and to not award a contract to any of the Operators responding. Operators are solely responsible for their own costs and expenses in preparing or presenting their proposal and for subsequent negotiations with BC Housing and IH, if any. Neither BC Housing nor Interior Health is liable to pay such costs and expenses nor to reimburse or compensate an Operator under any circumstances.

Appendix A

Tenant Profile and Service Requirements

Independent Living BC (“ILBC”) is a partnership between the five regional health authorities and BC Housing to create assisted living particularly for those in need with low and moderate incomes. Through the Canada—British Columbia Affordable Housing Program Agreement, BC Housing also administers funding for ILBC from Canada Mortgage and Housing Corporation (CMHC), an agency of the federal government.

Tenant Access and Profile

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

The minimum entrance criteria as outlined by the *Office of the Assisted Living Registrar* include:

- must be able to make informed directions regarding their daily activities and personal assistance services in assisted living;
- must be able to express their wishes so as to be understood by personal assistance staff or by a spouse living with them who can communicate with staff on their behalf;
- cannot, through their behaviors, jeopardize the safety or well-being of others; and
- must be able to use an emergency response system and take direction in an emergency situation.

Interior Health case managers review each potential resident and provide a needs assessment to determine the potential suitability for the requirements of Assisted Living under the *Independent Living BC* program.

Care Requirements

All Tenants in assisted living must meet the following requirements:

- require one, *but not more than two*, prescribed services (see next section directly below) and/or be at significant risk in their current living situation
- require all three services, *housing, hospitality and personal care*
- be able to direct own care

“Prescribed Services” are defined by the Assisted Living Registrar and include the following:

- Assistance with the “activities of daily living” (ADL’s)
- Medication Administration & Monitoring
- Maintenance or Management of Cash, Resources or Property
- Intensive Physical Rehabilitation
- Psychosocial Rehabilitation
- Monitoring of Food Intake or Therapeutic Diets
- Structured Behavioral Program

Accommodation and Service requirements

Assisted living units 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 (a minimum of two meals daily, housekeeping, laundry service, social and recreational opportunities, and 24-hour response);
- personal care 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 and hospitality services affordable for lower income Tenants.

Home-like environment

The accommodation must be a private space with a lockable entrance door. Proponents should refer to Appendix B. Design and Construction Standards for Assisted Living. These criteria will be used to evaluate the housing component of the EOI Submissions on a comparative basis.

Hospitality services

“Hospitality services” refers to those services that are hotel-like in nature and include two meals a day, one of which is the main nutritious meal, housekeeping, laundry services, social and recreational opportunities, monitoring and a 24-hour response system.

Food services

Preferably meal service will be restaurant-style including menu choices, some flexibility as to when Tenants can eat, and the capacity to handle special dietary needs of Tenants (e.g. diabetic, high cholesterol, or minced diets). As well as meeting the basic Food Safe preparation qualifications, the kitchen staff or those responsible for menu preparation should demonstrate the ability to plan nutritious, balanced meals.

Housekeeping services

The standard for housekeeping and heavy laundry (linens and towels) is weekly service, periodic cleaning of carpets and drapes, and wipe up after spills and accidents.

Social and recreational opportunities

The operator is expected to facilitate the Tenant’s participation in social and recreational activities. That may mean organizing opportunities on-site or providing easy access to events off-site. These opportunities should be scheduled regularly and involve the Tenants who may choose to influence the nature of the activities.

24-hour response and monitoring

The operator must provide 24-hour response through a staff person. Where the operator has staff on duty 24-Hours a day (e.g. to provide personal care services), no additional staffing is required. Staff must be able to respond when a Tenant is experiencing difficulties and must be able to follow protocols established by Interior Health, depending on the nature of the difficulty.

“Monitoring” means the operator’s staff are sensitive to any signs of concern, which should be raised with the Tenant, family, and/or the Interior Health staff responsible for the Tenant’s care.

Personal care services

All Tenants referred through *Independent Living BC* will also require some level of personal care services. Personal care services means those services that assist a person with the activities of daily living and specific nursing and rehabilitation tasks delegated under the provincial Personal Assistance Guidelines (Ministry of Health, January, 1997). Related skills include transferring, moving around safely, and assistance with personal hygiene, bathing, dressing, grooming, and eating.

The standards for evaluating the provision of personal care services are:

1. Philosophy of personalized assistance which reflects an understanding of the target population;
2. Staff with the skills to serve the target population (including educational and training requirements and/or opportunities for staff);
3. Staff history to indicate good potential for consistency of care; and
4. Processes in place to provide quality assurance, accountability to Tenants, and managed risk, potentially including managed risk agreements.

Tenants will include frail 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.

Appendix B

Design and Construction Standards for Assisted Living

The “Mandatory Design and Construction Standards” below are the criteria that will be used to evaluate the housing component of the EOI submission.

To be considered, an EOI submission must meet these *mandatory* standards. Buildings that do not currently meet the mandatory requirements may be proposed if the Proponent commits to meet them through renovation or retrofit.

Mandatory Design and Construction Standards

M.1 Accessibility - Building

The building, including the main entrance, circulation, amenity spaces and the entry to all dwelling units, shall facilitate easy access for frail seniors and adults with disabilities.

M.2 Accessibility - Dwelling Unit

The dwelling units shall have sufficient clearances, particularly in the bathroom, to facilitate easy access for frail seniors and adults with disabilities who require the use of mobility aids such as walkers and assistance by care aides.

Bathroom Grab Bars - grab bar layout in compliance with CMHC *Housing for Persons with Disabilities* or other recognized standard.

Shower or bathtub shall have a non-slip surface.

M.3 Dwelling Unit - Features

Dwelling unit shall be self-contained with a lock on the entry door.

Dwelling unit shall include a three-piece bathroom with sink, toilet, and shower or bathtub, and sleeping / living area.

M.4 Life-Safety Systems

Sprinkler protection and fire alarm system shall comply with NFPA 13 or NFPA 13R for both common areas and dwelling units.

Install attic sprinklers, or alternative allowed by NFPA 13 (e.g., fire retardant paint).

Dwelling units shall be equipped with hard-wired, in-suite audible smoke alarms or detectors.

M.5 Emergency Response System and Monitoring

Dwelling unit shall be provided with an emergency response system.

Appendix C

Resources to Assist Proponents

The following resources may help Proponents respond to this Request for Expressions of Interest.

Interior Health

www.interiorhealth.ca

BC Housing

www.bchousing.org/programs/independent

Ministry of Health Services of BC

www.healthservices.gov.bc.ca/assisted

Appendix D

Letter of Committal

Date: _____

BC Housing
601 – 4555 Kingsway
Burnaby BC V5H 4V8

Attention: Manager, Program Development

Re: Request for Expressions Of Interest

I, (name) am the (position) of (legal entity – company or society, etc.), the Proponent of the attached submission. I have the authority to submit this submission and bind and make representations for the Proponent. Through submission of this submission, we agree to all the terms and conditions of the request for Expressions Of Interest and we agree to be bound by statements and representations made in this document.

We understand that our submission is subject to the *Freedom of Information and Protection of Privacy Act* under which applicants can request that provincially funded bodies, such as BC Housing, release information on the allocation of provincial program funds. Records can be withheld if their disclosure would be harmful to the business interests of the provincial body or the party with which it is doing business; however, in the case of a dispute, the final decision is made by the Information and Privacy Commissioner.

We certify that we do not have any actual or potential conflict of interest between our interests and the interests of BC Housing and the Interior Health under this Request for Expressions Of Interest process and that there is no collusion or arrangement between the Proponent and other Proponents in connection with this submission. We acknowledge that if a conflict exists, BC Housing and Interior Health may, at their discretion, withhold consideration of our submission.

We authorize and consent to BC Housing and Interior Health receiving and exchanging with others, including credit bureaus, the references provided in the submission, and with other persons with whom we have had dealings, credit and other information about us. We understand that such information will be a factor in the decision of BC Housing and Interior Health to enter into agreements for this request for Expressions Of Interest.

Proponent's legal name:

Authorized Officer:

Appendix E

Operating Budget Expense Allocations

Expense	ILBC Units	Private Units	Total
Direct Care			
Assisted Living Leader (day)			
Assisted Living Worker (eve)			
Assisted Living Worker (night)			
Purchased Service (education)			
TOTAL WAGES			
Accommodations (in-direct)			
Chef			
Plant Maintenance			
Equipment Maintenance			
TOTAL INDIRECT WAGES			
Non Wage			
Food Costs			
Activity / transport			
Housekeeping/Laundry Supplies			
Maintenance Supplies			
Registrar application and annual cost			
TOTAL NON WAGES			
Administration			
Assisted Living Leader			
Leader Education			
TOTAL ADM WAGES			
Non Wage			
Office overhead/supplies			
Audit & Legal Fees			
Travel / Accommodations			
Mentorship Fee			
Service Insurance (liability)			
Building Insurance			
Utilities			
Utilities: Heating & Hot Water			
Utilities: Electrical			
Utilities: Garbage Removal			
Utilities: Water & Sewer			
Replacement Reserve Provision			
Property Tax and Licenses			
Mortgage Principal & Interest			
Other (Please Specify)			
TOTAL NON WAGES			
TOTAL EXPENSES			

Appendix F

Evaluation

Introduction

Each EOI Submission will be reviewed with respect to the following criteria to determine whether it meets a satisfactory standard.

Where there is only one Proponent in a community and it meets the basic standard, the Funding Partners will negotiate directly with that Proponent to reach an agreement. Where two Proponents in a community both achieve a satisfactory standard, they will be asked to provide more specific detail with a view to providing the Funding Partners with sufficient information to choose which Proponent can provide better value.

EVALUATION CRITERIA

CRITERIA	Requirement Satisfied
Respondent information (legal entity and principle contact information)	<input type="checkbox"/>
Demonstrated understanding in the delivery of hospitality and personal care services	<input type="checkbox"/>
Staffing plan demonstrates understanding of services required	<input type="checkbox"/>
Demonstrated ability to meet required number of units	<input type="checkbox"/>
Demonstrated ability to meet required time line	<input type="checkbox"/>
Demonstrated ability to meet expected funding range	<input type="checkbox"/>
Location appropriate for assisted living	<input type="checkbox"/>
Building meets mandatory design and construction standards for assisted living	<input type="checkbox"/>

RESULT If all requirements are satisfied (all boxes are checked), indicate "Pass"; otherwise indicate "FAIL", which will eliminate the Proposal from further consideration.