



**REQUEST FOR QUALIFICATIONS
RFQ # 08-29**

Non-Profit Developers
for
MHSA Housing

Due Date:

4:00 p.m., PST on Monday, February 11, 2009

San Joaquin County
Purchasing and Support Services
222 East Weber Ave., Room 675
Stockton, CA 95202

BUYER: Jon Drake, jdrake@sigov.org, (209) 468-3250

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	Attachments C & D are included in a separate Excel File that has been included with the download of this RFQ	

Key Action Events

Listed below are the events and dates for this RFQ. All dates are subject to revision.

Event #	Description	Due Date
1	Release of RFQ # 08-29	Wednesday, December 3, 2008
2	R.S.V.P. to jdrake@sigov.org Re: Informational Meeting Attendance	Monday, December 29, 2008
3	*Non-Mandatory* Informational Meeting	Thursday, January 8, 2009
4	Letters of Intent to Submit due	Wednesday, January 14, 2009
5	Last Day to Submit Questions.	Thursday, January 15, 2009
6	Last day for County to answer questions.	Friday, January 23, 2009
7	RFQ's due no later than 4:00 p.m. P.S.T.	Wednesday, February 11, 2009
8	Invitation to proceed announced	Friday, March 6, 2009

INTRODUCTION SHEET

1. PURPOSE

The California Department of Mental Health (DMH), the California Housing Finance Agency (CalHFA) and the County Mental Health Directors Association are pleased to announce a new housing program.

The intent of this Request For Qualifications (RFQ) is to identify qualified non-profit developers/borrowers, as defined in the MHSA Housing program guidelines, to develop permanent, affordable rental housing units, including shared housing, with supportive services for individuals with a mental illness and their families. For details regarding the MHSA Housing program guidelines and the target population, refer to the State DMH website at http://www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp

San Joaquin County Purchasing on behalf of San Joaquin County Behavioral Health Services will be accepting responses to this RFQ until 4:00 p.m., PST on Monday, February 11, 2009.

2. BACKGROUND

On August 6, 2007, the California Department of Mental Health (State DMH) and the California Housing Finance Agency (CalHFA) launched the Mental Health Services Act (MHSA) Housing Program that provides funding to support capital development and capitalized operating subsidies for supportive housing for individuals with severe mental illness and their families. On a statewide basis, the MHSA Housing Program will allocate \$75 million annually to finance capital development (including predevelopment, acquisition, and rehabilitation) and \$40 million annually for capitalized operating subsidies.

Through this program \$6,339,500 in Mental Health Services Act (MHSA) funds will be allocated to San Joaquin County to finance the capital costs associated with development, acquisition, construction and/or rehabilitation of permanent supportive housing for individuals with mental illness and their families, targeting homeless or at risk for homelessness individuals with mental illness. The MHSA Housing Program also allows up to \$2,113,200 of the \$6,339,500 to be used for capitalized operating subsidies. To obtain additional details, refer to the State's website at http://www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp.

As stated on the State's website, eligible developers and borrowers must develop projects in conjunction with local departments of mental health, which will then submit an application to the California Department of Mental Health (DMH) and CalHFA for each project. Applications must include a local commitment to provide mental health services and other support services for individuals who reside in the

proposed housing units. California Department of Mental Health (DMH) and CalHFA will review the applications and make selection determinations and subsequent awards.

The MHSAs Housing Program embodies both the individual and system transformational goals of the MHSAs through a unique collaboration among government agencies at the local and State level. The partners in this system collaboration include CalHFA and the Department of Housing and Community Development, with their housing and financial expertise; DMH, with responsibility for overseeing the mental health system and ensuring that consumers have access to an appropriate array of services and supports; and county mental health departments, which have ultimate responsibility for the design and delivery of mental health services and supports throughout the State.

The program makes permanent financing and capitalized operating subsidies available for the purpose of developing permanent supportive housing, including both rental housing and shared housing, to serve persons with serious mental illness who are homeless or at risk of homelessness and who meet the MHSAs Housing Program target population description.

Once funds are awarded, CalHFA will oversee all housing and financial aspects of the development and DMH will oversee provision of services, including continuing assessment as to whether the target population served continues to meet MHSAs Housing Program requirements. Capital funds may be used for either Rental Housing Developments or Shared Housing Developments. For Rental Housing Developments, applicants will also be required to obtain capital funds from a range of programs administered by other agencies including, but not limited to, the Department of Housing and Community Development (HCD), CalHFA, the Tax Credit Allocation Committee (TCAC), localities, and the federal Department of Housing and Urban Development (HUD). However, for Shared Housing Developments, funds from this new program may be used to cover all capital costs up to the funding limits specified in this application.

More about the MHSAs Housing Program can be found at: http://www.dmh.ca.gov/Prop_63/MHSA/Housing/default.asp.

*****NON-MANDATORY RFQ INFORMATIONAL MEETING*****

There will be a Non-Mandatory RFQ Informational Meeting scheduled for **Thursday, January 8, 2009.**

Location: 3121 West March Lane
Moss Adams LLP
Stockton, California 95219
Date: January 8, 2009
Time: 8:30 a.m. – 10:00 a.m., PST

- Letters of Intent (LOI) to submit qualifications are requested. Please submit the Letter of Intent Form, Attachment A, either by fax to Jon Drake at (209) 468-3393 or e-mail to jdrake@sjgov.org. The Letter of Intent is not mandatory, but is appreciated by Wednesday, January 14, 2009.
- Additional questions after the RFQ Informational Meeting must be submitted via email no later than **4:00 p.m., PST, Thursday, January 15, 2009** to jdrake@sjgov.org. Any questions about the RFQ should be directed to jdrake@sjgov.org. Any attempt to obtain answers from or pose questions to someone other than Jon Drake is grounds for rejection of the submitting agency's qualifications. Any Addenda as well as submitted questions and their answers will be posted on the website, sjgov.org. All submitting agencies are required to download all Addenda from sjgov.org and include printed and signed addenda with the submission of the agency's qualifications.

Scope of Project

1. Housing Principals

SJC BHS is seeking projects that are consistent with the following housing principals:

- Demonstrate a high degree of “readiness”. Readiness is defined as those projects that have site control, all planning, zoning and other entitlements necessary to obtain a building permit, State and Federal environmental clearances, as applicable, and commitments of at least some of the other funding sources required for construction and permanent financing.
- Projects that serve target population members who are at 30% Area Median Income or lower.
- Projects that propose to serve people who are homeless over projects that propose to serve people who are at-risk of homelessness.
- Prioritize projects that maximize funds through local funding commitments and leveraging with preference being placed on projects that maximize the number of units for the total amount of funding available. Collaboration with the County of San Joaquin and city funds is encouraged, i.e. the Neighborhood Stabilization Project.
- Encourage geographic dispersion by funding projects located in different areas throughout the County.

2. MHSA Housing Program Target Population

The MHSA Housing Program is intended to provide funding to create permanent supportive housing with services for individuals with serious mental illness who are homeless. Secondly, and in keeping with the values of the MHSA, the State believes that individuals should not have to ‘fail first’ and become homeless in order to become eligible for supportive housing; rather, individuals identified as “at risk of homelessness” are eligible for the housing and supports available under this program. Please note that “at risk of homelessness,” as used here, is a definition unique to the MHSA Housing Program and is not applicable to other local, State or federal housing programs.

The MHSA housing target populations are adults (ages 25 – 59), older adults (ages 60+), and transition age youth (ages 16 – 24) with serious mental illness, as well as children with severe emotional disorders and their families. To be eligible for MHSA housing units, those within the identified target population must also be homeless or at-risk of homelessness (as defined below).

Definitions of terms:

- a. Adults or older adults with serious mental illness as defined in Welfare and Institutions Code Section 5600.3(b) (1).
- b. Children or adolescents with severe emotional disorders as defined in Welfare and Institutions Code 5600.3 (a) (1), and their families.
- c. Homeless: Living on the streets, or lacking a fixed, regular, and adequate night time residence. (This includes shelters, motels and living situations in which the individual has no tenant rights.)
- d. At-risk of homelessness includes the following:
 1. Transition-age youth (as defined in Welfare and Institutions Code Section 5847(c), and in Title 9, California Code of Regulations, Section 3200.80) exiting the child welfare or juvenile justice systems.
 2. Individuals discharged from institutional settings including:
 - i. hospitals, including acute psychiatric hospitals, psychiatric health facilities (PHF), skilled nursing facilities (SNF) with a certified special treatment program for the mentally disordered (STP), and mental health rehabilitation centers (MHRC)
 - ii. crisis and transitional settings
 3. Individuals released from city or county jails.
 4. Individuals temporarily placed in Residential Care Facilities upon discharge from one of the institutional settings cited above.
 5. Individuals who have been assessed and are receiving services at the County Mental Health department, who have been deemed to be at imminent risk of homelessness, as certified by the SJC BHS Director or their designee.

The MHSA housing target population includes individuals with personal histories of housing instability and difficulty accessing mainstream affordable housing resources. It is expected that tenants may come with:

- Annual incomes that typically fall below 15% of area median income
- Histories of prolonged homelessness, prior evictions, and/or poor credit
- Possible historical involvement with the criminal justice system

This target population is disabled, and given their anticipated histories, it is expected that developers may need to make reasonable accommodations as part of their tenant selection and lease-up process.

3. Qualified Developers / Borrowers

Qualified developers include any of the following:

- a. Developers with a track record of successful housing development and a history of serving the target population,
- b. Developers with a track record of successful housing development but with no history of serving the target population, but with a strong contract/Memorandum of Understanding with a qualified service provider and property manager, and the assistance of qualified consultants with a history of successfully working with developers to house the target population,
- c. A qualified supportive services provider with a joint venture developer partner with a history of successful development, who has entered into a contract/Memorandum of Understanding (acceptable to CalHFA) with a qualified property manager, and has the assistance of qualified consultants who have a history of successfully working with similar joint venture partners to house the target population,
- d. A qualified supportive services provider with a qualified development team that has a history of successful development and that has entered into a contract/Memorandum of Understanding (acceptable to CalHFA) with a qualified property manager, or
- e. For a Shared Housing Development that consists of a condominium, single family home, duplex, triplex and/or four-plex, an appropriate agency of the County.

The developer and its affiliate organizations will be evaluated both for their ability to successfully develop and manage the real estate component of the development, and for their ability to partner with a primary service provider(s) to deliver high-quality services to the target population.

4. Housing Options

The types of permanent supportive housing that may receive funding under the MHSA Housing Program include:

Shared Housing Developments are rented to and shared by two or more unrelated adults, each of whom is a member of the MHSA Housing Program target population.

A Shared Housing Development must:

- provide a separate lockable bedroom for each adult;
- ensure each adult tenant has a lease and is responsible for paying rent;
- be restricted for occupancy to members of the target population; and
- contain a bathroom and common living space.

Rental Housing Developments are apartment buildings with 5 or more units.

A Rental Housing Development includes:

- both general occupancy buildings and special occupancy buildings,
- all units, including single room occupancy units, shall include at a minimum, a sleeping area, a kitchen area, bathroom, and living space, and
- MHSA units restricted for occupancy to members of the target population.

The development may be either a:

- **Single Population Development**—Development in which all units are dedicated to housing the MHSA Housing Program target population, or a
- **Mixed Population Development**—Development that has set aside a specific number of units within a development to house the MHSA Housing Program target population. The other units are open to occupancy by persons who are not members of the MHSA Housing Program target population.

5. Consumer Housing Preferences

Community input was sought throughout the original MHSA Community Supports and Services planning process and again in July and August of 2008 to determine the type of housing developments that consumers thought would support resiliency and recovery. The following result of that input is meant to serve as broad and important guidelines for the non-profit developer. Community participants and the Ad Hoc Housing group also noted that the guidelines should be balanced with the ability for MHSA to maximize funding if non-profit developers are already in a planning process that would match MHSA requirements.

a. Housing Type and Geographical Location:

Guidelines for the non-profit developers:

- Mixture of single population sites (efficiencies in service and funding leverage) and scattered shared housing (consumer request for options);
- Lodi – single population site with minimum of 12 units for MHSA tenants;
- Tracy – single population site with minimum of 8 units for MHSA tenants;
- Stockton – scattered shared housing with total of 18 units for MHSA tenants, and;
- The remainder of the units will be dedicated to areas such as Manteca or other communities that developers designate and have shown

interest in supporting a project – scattered shared housing with total of 4 units for MHSA tenants.

b. Age Focus

The question of what age would be the focus for MHSA unit tenants resulted in the decision that the non-profit developers need to consider:

- The match of age percentages of Severely Emotionally Disturbed / Severely Mentally Ill in the county;
- Safety and risk considerations of mixed age populations; and
- Other funding specific to age populations that will increase the leverage of MHSA dollars.

For example, there is funding through August 2009 specifically for housing the homeless transitional age youth from 18-25 (younger if emancipated). We might decide on joining that funding source to maximize the MHSA funds.

The following table is from the original San Joaquin County Community Supports and Services Plan and details the estimated ages and numbers of residents with SED/SMI in the County.

Age Group	Est. # County Residents with SED/SMI	% Share of Total County Residents with SED/SMI
Children & Youth (0-15)	11,192	30%
Transitional Age Youth (16-25)	8,188	18%
Adult (26-59)	16,671	41%
Older Adult (60+)	4,357	11%
Total	40,408	100%

c. Service Priorities

The following service priorities should be considered by the non-profit developer during their planning process:

- Affordability
- Public transportation access
- Employment opportunities
- Vocational education access
- Resource/services space
- Recreation area for different age groups

6. Capital Costs

Rental Housing Developments

A county may apply for up to one-third of the capital costs of the MHSA Housing Program restricted units in a Rental Housing Development (developments with five or more units) to a maximum of \$100,000 per targeted unit. At a county's request, amounts greater than \$100,000, up to 1/3 of total development costs per targeted rental housing unit, will be considered on an exception basis.

Shared Housing Developments

A county may apply for the full or total capital cost of shared housing units that are dedicated to the MHSA Housing Program target population up to a maximum of \$100,000 per bedroom.

Other funds may be obtained from such sources as grants, tax credits, other deferred, forgivable or residual receipts loans from governmental and private loan sources, and other county mental health funds. The loan term for capital funds awarded under this program will be 18-20 years or longer if required by other funding sources.

7. Funding Limits on Capitalized Operating Subsidies

The MHSA Housing Program will initially make available up to \$2,113,200 in capitalized operating subsidies as part of the \$6,339,500 million available for supportive housing. Capitalized operating subsidy funds may be provided only to those developments that:

- Receive funds for capital costs from the MHSA Housing Program,
- Require capitalized operating subsidies to cover their operating costs,
- Request capitalized operating subsidies for those MHSA Housing Program target population units housing individuals whose combined income is 50 percent or less of area median income,
- Have applied for but have been denied rental or operating subsidies from all other available and appropriate sources (for at least one application cycle), including project-based Section 8 and all HUD McKinney programs such as Shelter Plus Care and the Supportive Housing Program, and
- Set the tenant portion of the restricted rent for units with an MHSA Housing Program capitalized operating subsidy at no lower than 30 percent of the current SSI/SSP grant amount for a single individual living.

8. Operating Viability

A key element to consider in crafting an application for MSHA funds is the manner in which a project ensures operational viability over the long term while providing affordable rents to households with incomes that will initially average 15% of the area median or below (roughly equivalent to SSI). There are no income limits for MSHA Housing Units, just rental limits provided that:

- The MSHA tenant is a member of the target population.
- The unit qualifies for the California Welfare Tax exemption.

Rents in MSHA Housing Program targeted units must be restricted to 30 percent of 50 percent (15%) or less of area median income (as adjusted by household size). This applies to all MSHA HP units. In units which receive MSHA HP Capitalized Operating Subsidies, the tenant portion of the restricted rent must be set at:

- no lower than 30 % of the current Supplemental Security Income/State Supplemental Program (SSI/SSP) grant amount for a single individual living independently, or
- 30 % of total household income, whichever is higher.

Developers may also make the MSHA units affordable to the target group through other funding sources such as project –based Section 8 and Shelter Plus Care. San Joaquin County wants to ensure that all funded MSHA housing projects have operating budgets that are robust enough to ensure the long-term viability of the project, while ensuring that the tenant rents are affordable to the target population.

It is anticipated that the operating subsidy will be distributed over a 15 to 20 year time period.

RFQ Grading Criteria

Following the deadline for receipt of qualifications, all submissions will be analyzed and reviewed by a Reader's Panel consisting of representatives of the Behavioral Health Services, SJC Purchasing Department, key community members and consumers.

San Joaquin County Behavioral Health Services reserves the right to negotiate a project based on all factors involved in the written submission without further discussion or interview. This right includes the ability to expend funds in a phased fashion.

Submissions will be evaluated for compliance with all requirements set forth in this RFQ, including timely submission and provision of all documents requested; and for the following minimum requirements:

1. Submission Format and Content

- A. Identification Sheet (0 points) see page 22
- B. Table of Contents (0 points)
- C. Organizational Philosophy (15 points total for this section) *1 page limit*
 - a. Please provide a brief description of your organization's underlying philosophy in serving the target population as described in the RFQ (see page 6).
 - b. What is your organization's mission statement?
 - c. How does developing supportive housing for mentally ill individuals fit into your organization's mission?
- D. Organizational and Staffing Capacity (25 points total for this section) *3 page limit*
 - a. Describe your organization's capacity to provide support for the successful development and operation of supportive housing for individuals with a mental illness.
 - b. Please describe any previous experience your organization has in developing supportive housing or operating supportive housing. Please include size of development, the date (s) of development, location, unit number, types of support services offered, property management methods, operating budget, and any other key factors as they pertain to this RFQ.
 - c. Please describe two (2) of your organizations' current projects.
 - d. Identify key staff members responsible for implementation of this housing development. Note the role and responsibilities of each staff member and describe how the staff member's training and experience prepare him/her for this role.

- E. Project Design (45 points total for this section) *5 page limit*
- a. Describe the process that your organization will follow to plan the MHPA development and to complete Section A, B and/or C. of the MHPA Housing program application. (We do **not** want you to complete Section A, B, or C for this RFQ, but it will be required for final submission to DMH and CalHFA). The application is available at: http://www.dmh.ca.gov/Prop_63/MHPA/Housing/docs/MHPAApplication_rev08-13-07.pdf.
 - b. Describe the target group for the MHPA Housing Project. Indicate how your organization's experience prepares it to serve the needs of this multicultural group of English, Spanish and Hmong speaking residents.
 - c. Outline the proposed housing project. Describe how it meets the needs of the specific target group and fits within the San Joaquin County Community Services and Supports Plan. How does the plan meet the development characteristics as identified by the San Joaquin County community members and consumers? Please see section 5. Consumer Housing Preferences, page 9. Specifically identify how it meets the following MHPA Housing requirements: alignment with the San Joaquin County Community Services and Supports Plan, serving the target population as defined on page 6 of this RFQ, and development of permanent supportive housing that meets the development characteristics as stated on page 8 in the Housing Options section of this RFQ. For additional information on the SJC CSS Plan please see <http://www.sjmhsa.net/mhsaplan.html>.
 - d. Describe the criteria you will use to select tenants who meet the requirements of the MHPA Housing Project.
 - e. For services not provided by your organization, please explain how you will assist individuals in accessing all relevant community-wide services.
 - f. Demonstrate your organization's relationships and linkages to service providers in the area and explain how you will coordinate with service agencies. Describe your referral relationships with local mental health and substance abuse programs.
- F. Financial Information and Proposed Project Budget (15 points total for this section) *2 page narrative limit*
- a. Please provide a projected draft budget for your proposed housing project as described above to include the proposed capital and operating subsidies that your organization would be requesting for the number of units you would be developing. Include expected client fees as well other potential funding sources used to complete and sustain the project. We understand that this is a draft based on your current understanding of the project cost and are aware that there may be estimates of potential funding partners that are not currently committed to funding. See Attachment C, Development Budget and Attachment D, Cash Flow Analysis which have been included in a separate Excel

file with this RFQ. The budget forms are not included in the two page narrative limit.

- b. As a housing developer please provide a description of your agency's resources that will validate your capacity to administer this housing program for the period expected from the MHSA.
- c. Include your most current audit summary (management letter) of your organization as an appendix (not included in the 2 page limit).

2. RFQ Review Process

Preliminary Review

Submissions will be reviewed by County staff and the Deputy Purchasing Agent to determine whether they conform to the structure outlined in the RFQ and includes that each submission includes all required elements. Submissions must adhere to the structure outlined in this RFQ. If a response to a section of the RFQ appears outside the appropriately labeled section of the response or is longer than the allotted page restrictions, the response may be eliminated prior to the panel review.

Reader's Panel

A Reader's Panel will be established with a minimum of three readers to assist in the evaluation of each submission. The Reader's panel will consist of objective administrators and clinicians of mental health services, non-profit developers, service providers, family member(s) and/or consumer(s), or other individuals SJC Behavioral Health Services deems capable and appropriate for the selection of potential developments.

Scoring of Submissions(s)

The Reader's Panel will read and score submissions using the RFQ guidelines and a scoring instrument as the principal guidelines for determining the adequacy of the responses and the qualifications of the developers. The scoring instrument will reflect the requirements of the RFQ and the point values associated with each section of the RFQ.

SJC BHS reserves the right to reject submissions from organizations, which have provided unsatisfactory contract performance in the past.

A maximum of 100 points for each submission is possible using the following scoring:

- Organization Philosophy 15 points
- Organizational and Staffing Capacity 25 Points
- Project Design 45 Points
- Financial Information and Proposed Project Budget 15 Points

Project submissions that will be invited to move forward in the application process will be selected based on overall score. The Purchasing Agent will present the top scoring recommendations to SJC BHS Director for submission to the Board of Supervisors for the approval decision.

RFQ REQUIREMENTS

A. Contractor Responsibilities

All procedures and services must be in compliance with Federal, State, County and Local laws and Regulations. The contractor will be responsible for the following:

Insurance

Workers' Compensation

As required by any applicable state or federal law or regulation including the United States Longshoremen's and Harbor Workers' Compensation Act, the Jones Act and Admiralty or Maritime Law.

Contractor is aware of the provisions of Section 3700 of the Labor Code that requires every employer to be insured against liability for Workers' Compensation or to undertake self-insurance in accordance with the provisions of that code, and will comply with such provision before commencing the performance of work for San Joaquin County.

Commercial General Liability

Combined single limits of liability for bodily injury or property damage including personal injury.

\$1,000,000	BI & PD each occurrence
\$1,000,000	Personal and Advertising injury each offense or act or related series of offenses or acts

The General Aggregate and the Products Completed Operations Aggregate limits shall each be \$1,000,000. Coverage not specified above may be equal or less than each occurrence limit. When applicable, explosion, collapse, underground (XCU) must be endorsed to policy.

Automobile Liability, with Contractual Liability Coverage

Contractor agrees to hold harmless and indemnify the County for any and all liabilities associated with the use of any automobiles in relation to tasks associated with this Agreement.

Additional Insured

San Joaquin County, its officers, agents and employees respectively shall be made Additional Insured to include ongoing operations and products completed operations (on Additional Insured Endorsement CG 20 10 10 93), except for workers' compensation and professional liability, and insurance policy shall contain provisions that such policy may not be canceled or reduced except after thirty (30) days' written notice to the County. A Certificate of Insurance or other form acceptable to the State of California/San Joaquin County evidencing the required coverage (including additional insured endorsement) **MUST BE SUBMITTED BEFORE COMMENCING WORK ON COUNTY PROPERTY.** Contractor shall cause its lower-tier contractors at the job site to obtain and maintain insurance policies to protect San Joaquin County in accordance with the above requirements.

Contractor shall indemnify, defend, and save harmless the County, its officers, agents and employees from any and all claims and losses occurring or resulting to any person, firm, or corporation for damage, injury, or death arising out of or connected with the Contractor's activities or responsibilities under this agreement. Contractor shall maintain in force at all times during the performance of this agreement a policy or policies of insurance covering all its operations. The limit of insurance is one million dollars (\$1,000,000) combined single limit per occurrence. This limit includes bodily injury, property damage, general liability coverage which includes contractual liability coverage. Contractor's insurance shall be primary and the County shall be listed as additional insured.

A certificate evidencing the maintenance of such insurance coverage shall be filed with the San Joaquin County Purchasing & Support Services Department and the certificate shall state that the insurance is primary, that the County of San Joaquin, its officers and agents are additionally insured, and the certificate shall state that the coverage shall not be canceled or modified without giving the County thirty (30) days prior written notice. In addition, Contractor shall maintain Workers' Compensation insurance.

Discrimination:

Contractor shall not discriminate against any individual based on age, ancestry, color, creed, marital status, medical condition, national origin, physical or mental disability, political affiliation or belief, pregnancy, race, religion, sex or sexual orientation

Drug Free Workplace:

Contractor shall comply with the provisions of Government Code Section 8350 et seq., otherwise known as the Drug-Free Workplace Act.

All contractors will also be required to complete and comply with the Health Portability and Accountability Act (HIPAA) Business Associate Contract Provision, the Program Integrity Requirement for Medi-Cal Organizational Providers, the San Joaquin County Behavioral Health Services Standards of Conduct and Compliance Policy, and Limited English Proficiency requirements. Contracted CBO(s) will be responsive to and collaborate with San Joaquin County Behavioral Health Services designated contract monitor(s).

Reporting and Data Collection

The State Department of Mental Health is currently developing reporting requirements for MHSA. All contractors will be required to collect data as guidelines become available and as they change over time. It is anticipated at this point that contractors will submit data manually or electronically to SJC BHS on a timely basis as specified by SJC BHS. SJC BHS will collate the data and submit it to the California Department of Mental Health on a regular basis as required.

B. Submittal Format

Items to be included in your response are listed below:

1. Identification Sheet (page 22)
2. Table of Contents
3. Organizational Philosophy
4. Organizational and Staffing Capacity
5. Project Design
6. Financial Information and Proposed Project Budget
7. Signed Copy of the Addenda (obtain download at sigov.org.)
8. Reference Form (page 23)
9. RFQ Authorization Signature Page (page 26)

Submissions are to be prepared in a 12-point font; single spaced, with 1" margins, and consecutively numbered in the bottom right hand corner throughout the document. Applicants are to submit one (1) original, five (5) copies, and one (1) e-format copy on CD disc.

Original submission is to be clearly marked and in a 3-ring binder or stapled in the upper left hand corner, not bound.

The Submission envelope shall have stated thereon the name and address of the submitting organization, the RFQ name (RFQ for Non Profit Developers for MHSA Housing) and RFQ number (08-29).

Applicant agrees and acknowledges all RFQ specifications, terms, and conditions and indicates ability to perform by submission of response to this RFQ.

RFQ submissions shall be valid for a minimum period of ten (10) months.

All costs required for the preparation and submission of a response to this RFQ shall be borne by the Applicant.

Only one response will be accepted from any one person, partnership, corporation, or other entity.

It is the responsibility of the applicants to clearly identify information in their bid responses that they consider to be confidential under the California Public Records Act. To the extent that the County agrees with that designation, such information will be held in confidence whenever possible. All other information will be considered public.

All other information regarding the RFQ submissions will be held as confidential until such time as the review panel has completed their evaluation and, or if, an award has been made. Applicants will receive mailed informational notices, which will include the name of the organization(s) invited to move forward in the MHSA Housing Program Application Process. In addition, this information will be posted on the County's MHSA website, www.sjmhsa.net.

Each RFQ received, with the name of the applicant, shall be entered on a record, and each record with the successful RFQ indicated thereon shall, after the award of the order or contract, be open to public inspection.

C. Specification Changes:

The County may, during the RFQ period, advise the respondents of additions, omissions or alterations in the specifications by posting informational addenda on the Purchasing and Support Services website which can be accessed at sigov.org. Changes shall be included in the RFQ and become a part of the specifications as if originally submitted.

D. Amendments:

No one is authorized to amend this RFQ in any respect, by an oral statement or to make any representation or interpretation in conflict with the provisions of this RFQ. If necessary, supplementary information in addendum form will be posted to the Purchasing and Support Services website which can be accessed at sigov.org. Failure of any Respondent to have received such an addendum shall not relieve the Respondent from any obligation under their submittal.

E. RFQ Withdrawal

Any Respondent may withdraw their submission, either personally or by written request, at any time **prior** to the date and time due.

F. Right to Reject Submissions

San Joaquin County reserves the right to reject any and all submissions, or any part of a submission; to waive minor defects or technicalities; or to solicit new submissions on the same project or modified project, which may include portions of the original RFQ document, as the County may deem necessary and in its best interest. False, incomplete or unresponsive statements in connection with a submitted RFQ's may be sufficient cause for rejection. The County will be the sole judge in making such determinations.

G. Examine Specifications:

Respondent shall thoroughly examine and be familiar with the specifications herein. Failure or omission of any Respondent to receive or examine any form, instrument, addendum or other document, or become acquainted with existing conditions, shall in no way relieve Respondent from any obligations with respect to Respondent's offer or to the contract. Submission of a RFQ response shall be taken as prima facie evidence of compliance with this section.

H. All RFQ Documents Part of Final Contract:

Any RFQ documents, letters and materials submitted by the Respondent shall be binding and included as part of the final contract. Unauthorized conditions, limitations or provisions attached to RFQ response may cause its rejection.

I. Exceptions:

Any exceptions to this RFQ must be stated in your response. It is otherwise assumed that the wording within this document is acceptable and agreed to by the Respondent.

J. Resulting Contract:

Through the RFQ process, the County reserves the right to negotiate a contract based on all factors involved in the written submission without further discussion or interview and to award the project by city or in total.

The performance of the contract resulting from this submission shall be governed, construed and interpreted according to the laws of the State of California.

K. Notice:

Any notice, demand, request, consent approval or communication that either party desires or is required to give the other party shall be in writing and either served personally or sent by pre-paid first class mail or the equivalent thereof by a private carrier. Any such writing shall be addressed to:

County of San Joaquin
Purchasing Department
222 East Weber Avenue
Room 675
Stockton, California 95202
Attn: Jon Drake
RFQ # 08-29

Identification Sheet

RESPONDENT TO COMPLETE AND RETURN WITH RFQ SUBMISSION

Type or print the following information:

Company: _____

Address: _____

(City)

(State)

(Zip)

Name: _____

Title: _____ E-mail: _____

Telephone: () _____ Fax: () _____

Years in Business: _____

Number of Employees: _____

Name of insurance Carriers: _____

Public liability: _____ Expires: _____

Workers' Compensation: _____ Expires: _____

REFERENCES

SIMILAR CONTRACTS/RFQS PERFORMED: List below contracts under which the Respondent has provided similar services during the last three (3) years. Respondent's financial stability, technical and support capabilities will be verified through reference checking, which may include site visits and contact with other clients or vendors.

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

NON-COLLUSION AFFIDAVIT

(Title 23 United States Code Section 112 and Public Contract Code Section 7106)

In accordance with Title 23, United States Code Section 112, and Public Contract Code 7106, the bidder declares that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or solicited any other Proposer to submit a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

NOTE: The above Non-collusion Affidavit is part of the Proposal. Signing this Proposal on the identification form thereof shall also constitute signature of this Non-collusion Affidavit.

Proposers are cautioned that making a false certification may subject the certifier to criminal prosecution.

SUBMITTAL OF QUALIFICATIONS

Sealed submissions of qualifications will be received at the Office of the Purchasing Agent at 222 East Weber Ave., Room 675, Stockton Ca, 95202, until **Wednesday, February 11, 2009 at 4:00 p.m. P.S.T.**

ALL SUBMISSIONS SHALL BE ADDRESSED AS FOLLOWS:

Request for Qualifications # 08-29
Purchasing Agent
County of San Joaquin
222 East Weber Ave., Room 675
Stockton, CA 95202

The submission envelope shall have stated thereon the name and address of the submitting Contractor.

SUBMISSIONS WILL NOT BE ACCEPTED AFTER **Wednesday, February 11, 2009, 4:00 p.m. P.S.T.** ALL SUBMISSIONS RECEIVED AFTER SAID TIME AND DATE WILL BE TIME-STAMPED AND RETURNED UNOPENED TO THE SUBMITTER.

THE COUNTY WILL NOT ACCEPT RFQ'S SUBMITTED BY FAX OR E-MAIL

**RFQ AUTHORIZATION
SIGNATURE PAGE**

The undersigned, having carefully read and examined this RFQ, and being familiar with (1) all the conditions applicable to the work for which this RFQ is submitted; (2) with availability of the required equipment, materials and labor hereby agrees to provide everything necessary to complete the work for which this RFQ is submitted in accordance with the RFQ documents for the amounts quoted herein and further agrees that if this RFQ is accepted, within five (5) days after the contract is presented for acceptance, will execute, and mail a signed contract to the County of San Joaquin Purchasing Agent.

Signature of Authorized Agent

Date

Printed Name of Authorized Agent

**San Joaquin County Behavioral Health Services
Mental Health Services Act Housing Program
Request for Qualifications
Non Profit Developers for MHSA Housing: RFQ #08-29**

Letter of Intent to Submit Form

Name of Organization: _____

Contact Name: _____

Contact Phone: _____

Contact Email: _____

Agency Signature:

Letters of Intent (LOI) to submit qualifications are requested. Please submit the Letter of Intent to Submit Form, Attachment A, either by fax to Jon Drake at (209) 468-3250 or e-mail to jdrake@sjgov.org. The letter of intent is not mandatory, but is appreciated.

**SJC MHSA HOUSING PROGRAM
Glossary of Terms**

1.	Affordable Housing	The generally accepted definition of affordability is for a household to pay no more than 30 percent of its annual income on housing. Families who pay more than 30 percent of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation, and medical care.
2.	At Risk of Homelessness	<p>At risk of homelessness includes the following:</p> <ul style="list-style-type: none"> • Transition-age youth exiting child welfare or juvenile justice systems; • Individuals discharged from: <ul style="list-style-type: none"> - hospitals, including acute psychiatric - hospitals, psychiatric health facilities (PHF); - skilled nursing facilities (SNF) with a certified special treatment program (STP) for the mentally disordered; - mental health rehabilitation centers (MHRC); - crisis and transitional residential settings; and - city and county jails; • Individuals temporarily placed in a Residential Care Facility upon discharge from one of the above; and • Individuals who have been assessed and are receiving services at the County Mental Health Department, and who have been deemed to be at imminent risk of homelessness, as certified by the County Mental Health Director.
3.	Board & Care	A Board and Care Home is a housing facility for seniors or for individuals with disabilities who want or need to be in a group living situation and who may need assistance with personal care and daily living activities. Typically, a Board and Care facility is selected when 24-hour, non-medical supervision is needed or desired. Board and Care homes were the first widely recognized form of assisted living, and as such, they have been regulated by government agencies; but many Board and Care homes are of the “mom and pop” variety and not licensed. Thus, if a Board and Care home is under consideration, licensure status should be verified with a county or state licensing office. Board and Care homes can be a converted single-family home with up to 6 residents or

**SJC MHSA HOUSING PROGRAM
Glossary of Terms**

		may be a large building similar to an apartment building with over 100 residents. A characteristic feature of Board and Care is that communal meals are provided, and there is daily contact with staff.
4.	Chronic Homelessness	An unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or more, or has had at least four episodes of homelessness in the past three years.
5.	Congregate Housing	Apartments or cottages in which residents pay a monthly fee which includes rent, utilities, one to three congregate meals, housekeeping/chore services, 24-hour emergency response, and essential transportation. Personal care services are individually contracted between residents and private vendors.
6.	Efficiency Unit	A small dwelling unit, often consisting of a single room. In most cases, kitchen and bath facilities are not complete.
7.	Homeless	Homeless is defined as: <ul style="list-style-type: none"> • living on the streets, or • lacking a fixed and regular night time residence. This includes shelters, motels, and other temporary living situations in which the individual has no tenant rights.
8.	Independent Living Facility	Independent Living provides the greatest versatility and freedom. Independent Living refers to residence in a compact, easy-to-maintain, private apartment or house within a community. It offers the ability to maintain one's residence and lifestyle without custodial or medical assistance.
9.	Integrated Housing	Integrated housing provides integration of services and integration within the community. For example, in the past the housing was bundled or all in one place within the community where today scattered housing throughout the community is a more desirable approach.
10.	Mixed Population	A development that has set aside a specific number of units within a development to house the MHSA Housing Program target population. The other units are open to occupancy by persons who are not members of the MHSA Housing Program target population.
11.	Permanent Supportive Housing	MHSA Housing Program developments must offer permanent supportive housing to the target population. Supportive housing means housing with no limit on length of stay that is occupied by the target population and that is linked to on-site or off-site services. Services must help the tenant retain the housing, support recovery, and resiliency, and maximize the

**SJC MHSA HOUSING PROGRAM
Glossary of Terms**

		<p>ability to live and work in the community. Types of permanent supportive housing that may receive funding under the MHSA Housing Program include:</p> <ul style="list-style-type: none"> • Apartment buildings; • Duplexes, triplexes, fourplexes, and; • Single family homes and condominiums.
12.	Scattered Housing	<p>Designated housing units or developments that are “scattered” or dispersed throughout the county instead of congested into one local area.</p>
13.	Section 8 (Voucher Program)	<p>Currently, the main Section 8 program involves the Voucher Program. A voucher may be either “project-based” (where its use is limited to a specific apartment complex; Public Housing Authorities (PHA’s) may reserve up to 25% of its vouchers as such) or “tenant-based” (where the tenant is free to choose a unit in the private sector, is not limited to specific complexes, and may reside anywhere in the United States or Puerto Rico where a PHA operates a Section 8 program, though in practice such portability is very difficult).</p> <p>Under the voucher program, individuals or families with a voucher find and lease a unit (either within a specified complex or in the private sector) and pay a portion of the rent (based on income, but generally no more than 30% of the family’s income). The PHA pays the landlord the remainder of the rent, subject to a cap referred to as “Fair Market Rent” (FMR) which is determined by HUD. FMR is determined by several factors, including:</p> <ul style="list-style-type: none"> • the geographic area (city or county) where the unit is located (generally, a unit in a metropolitan area will have a higher FMR); • the unit size (in terms of the number of bedrooms, generally, the more bedrooms the higher the FMR, while a studio apartment would be at the low end), and; • whether the owner or tenant will pay utilities (generally, FMR is higher for units where the owner pays utilities). <p>The landlord cannot charge a Section 8 tenant more than FMR, even if the landlord does so for non-Section 8 tenants in similar units.</p> <p>Section 8 is currently managed through SJC Housing Authority. Their wait list has been closed since 2006.</p>

**SJC MHSA HOUSING PROGRAM
Glossary of Terms**

<p>14.</p>	<p>Shared Housing</p>	<ul style="list-style-type: none"> • A Shared Housing Development is a residential building that contains one or more traditional residences. All bedrooms in a Shared Housing Development shall be occupied by an MHSA eligible resident. • For purposes of the MHSA Housing Program, a bedroom in a Shared Housing Development is a unit. Each residential housing unit funded by the MHSA Housing Program must be occupied by an MHSA eligible resident, as determined by DMH and the sponsoring county mental health department. • All residences in a Shared Housing Development shall be rented to and shared by two or more unrelated adults, each of whom is a member of the MHSA Housing Program eligible residents. • While this program is intended primarily for unrelated adult house-mates, nothing in this definition excludes the spouse, adult partner, and/or child of an MHSA eligible resident from sharing the bedroom of the eligible resident, up to housing occupancy limits. • To qualify for funding, a Shared Housing Development must provide a lease and a separate lockable bedroom for each MHSA eligible resident, the MHSA eligible resident must be responsible for paying rent, and all bedrooms in each residence must be occupied by an MHSA eligible resident. • Each Shared Housing residence must also contain a living area, a kitchen and full bathroom. Kitchens and living rooms need to be appropriately sized to accommodate the number of residents in each residence. • Each residence with three bedrooms shall contain a minimum of a bathroom and a half-bath. Residences with four or five bedrooms shall contain two full bathrooms. A bathroom shall consist of a toilet, sink, and shower and/or bathtub. A half-bath shall consist of a toilet and a sink. • The maximum number of bedrooms per Shared Housing residence is five. • A Shared Housing Development may consist of a 2- to 4-unit building, provided that all units (bedrooms) in the building are targeted for use as Shared Housing.
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**SJC MHSA HOUSING PROGRAM
Glossary of Terms**

		<ul style="list-style-type: none">• Single-family homes, condominiums, and half-plexes may also qualify as a Shared Housing Development provided that they have a minimum of two bedrooms.• Shared Housing Developments cannot be located in Rental Housing Developments• One apartment/bedroom may be made available for a manager's apartment/bedroom, at the borrower's option, even if Shared Housing Development is not required by California law to have a manager's unit.
15.	Single Population	Development in which all the units are dedicated to housing the MHSA Housing Program target population
16.	Single Room Occupancy (SRO)	An SRO unit is a one-room unit intended for occupancy by a single individual. It is distinct from a studio or efficiency unit, in that a studio is a one-room unit that must contain a kitchen and bathroom. An SRO unit is not required to have either one, although many may have one or the other
17.	Skilled Nursing Facility	A place where nurses provide constant care: an institution where round-the-clock care is provided to patients by trained nurses.