

**Request for Proposal  
National Church Residences  
Housing Study Project Consultant**

**Purpose**

National Church Residences (NCR) is seeking proposals for a research organization to study existing NCR affordable senior housing and service models to determine the facility design features and other supports that result in Medicaid cost savings and improved quality of life for residents.

**Background**

National Church Residences (NCR) is a not-for-profit 501(C)(3) corporation and a leader in affordable senior housing. Our Mission Statement outlines our goals. On a daily basis, our four Core Values guide our work.

With headquarters in Upper Arlington, Ohio, NCR is the nation's largest not-for-profit developer and manager of affordable senior housing and services. With 330+ communities in 28 states and Puerto Rico, including five Ohio-based senior health care communities, NCR also owns and operates four Ohio continuing care retirement communities (CCRCs): Bristol Village in Waverly, Ohio; Traditions of Chillicothe; First Community Village in Upper Arlington; and Legacy Village, in Xenia.

NCR also operates InCare, the organization's senior home health care agency, as well as Heritage Day Health Centers, which has five locations across central Ohio. NCR works in conjunction with the City of Upper Arlington via the STAY UA program, which provides Upper Arlington residents, needed social services and health care in order to allow seniors to age-in-place in their own homes. NCR has 2,200 employees nationwide.

NCR has been awarded a grant from the Kresge Foundation to develop a reliable model of housing, services and supports that will allow residents with long-term care needs to live successfully in the community. NCR is partnering with the State of Ohio, through its Office of Health Transformation (OHT), to identify the key facility, technology, health care, and support service components that contribute to lower Medicaid costs and better health outcomes. NCR also is partnering with the National Affordable Housing Trust (NAHT) to provide financial modeling and to assist with estimating costs for new construction or retrofitting existing affordable housing units to meet the housing and facility design features that contribute to the success of these residents.

At the conclusion of this study, the Housing Study Project Consultant will work with NCR, OHT, and NAHT to propose a new funding mechanism at the federal level that accesses Medicaid funds for affordable housing development and related project costs and develop financial proforma(s) for a demonstration project to be undertaken at the conclusion of this study.

This proposal covers the period of February 20, 2012 through June 30, 2012 and is not to exceed a maximum amount of \$140,000. The selected consultant must be able to commence this work no later than February 25, 2012 and complete this work no later than June 30, 2012.

## **Scope of Work**

NCR seeks proposals from qualified research organizations with Medicaid expertise to study existing NCR affordable senior housing and service models in order to identify the housing and facility design features, assistive technology and equipment, health care and other professional services, and “soft” supports that are critical in helping residents with long-term care needs remain successfully housed in the community.

This RFP seeks a research organization that will:

- Work collaboratively with NCR, the State of Ohio, through its Office of Health Transformation, NAHT, and the affordable housing development community.
- Provide a literature review including lessons to be learned from other affordable housing plus services models in other states.
- Examine the characteristics of NCR residents including demographics, service needs, typical acuity levels, and the average annual health care and service costs attributed to Medicaid. Health care and service costs include all health care services, mental health services, social work, and other professional supports, including the delivery of “soft” supports, such as homemaker assistance, meal delivery, family involvement, and other supportive services.
- Compare health care and supportive service costs between current NCR affordable assisted living residents and a matched group of nursing home residents.
- Suggest the most viable funding models and resources required from other investors to make a demonstration project feasible, including any potential link to the concept of health homes for people with chronic conditions and other long-term funding options for housing costs, such as Section 8 vouchers, Residential State Supplement funding, or other opportunities.
- Identify key factors that would promote Medicaid cost savings, improve health outcomes, and improve quality of life, and estimate possible improvements in health outcomes accomplished via physical and behavioral health and housing integration. Factors may include health care and other professional services as well as “soft” supports, assistive technology and specialized equipment, and other factors.
- Identify adaptive technology, equipment, and modifications that help residents remain successfully housed.
- Estimate the Return on Investment, including benefits to Ohio's Medicaid program, reductions in hospital admissions, emergency department visits and 911 calls, and increases in resident satisfaction.
- Identify potential partnerships to strengthen the model and potential regulatory barriers.
- Provide a definition of data points and key outcome measures that should be collected for future housing developments to measure success.
- Attain feedback and public input on suggested demonstration model.

## **Deliverables**

- 1) Final Work Plan and timeline developed with NCR, NAHT, and OHT based on submitted proposal.

- 2) Final Report including a literature review, background, methods, results, and identification and implications for future demonstration model.
- 3) The content basis for the development of a financial proforma designed by NAHT.

### **Availability of Funds**

A maximum of \$140,000 is available to fund the Scope of Work identified in this RFP. Funds are available immediately, and must be expended by June 30, 2012.

### **Qualifications**

Proposal must demonstrate experience with the following:

- Designing and conducting studies of program effectiveness and program impact studies for long-term services and supports.
- Prior research work with Medicaid and state-funded long-term care systems; the Aging Network; Care for "dual eligible" populations; long-term care workforce; home and community-based services.
- Experience in public policy, public health, gerontology, epidemiology, psychology, sociology, statistics, survey research, long-term care administration and business analysis of Medicaid, Medicare, or other health claims data.
- Development of conceptual frameworks through the creation of logic models and definition of outcome measures.
- Providing decision-making support to policymakers and synthesizing policy options.
- Conducting secondary data analysis; primary data collection in cross-sectional, retrospective and longitudinal studies; or clinical trials.
- Conducting innovative methodological research to improve quality and cost-effectiveness.
- Proposals should demonstrate high academic rigor related to data collection and editing and analyses.
- Understanding of the U.S. healthcare system and affordable housing;

Preferred submissions will demonstrate prior research work with Ohio Medicaid, the Ohio Department of Health, the Ohio Department of Mental Health, the Ohio Office of Health Transformation, the Ohio Department of Insurance, and other State of Ohio and local Ohio government agencies, private foundations and stakeholders

### **Proposal Requirements**

Proposals must provide a detailed narrative including a description of the consultant qualifications and experience relating to the project; proposed strategies for completing the work; ability to coordinate and collaborate with NCR, OHT, and NAHT in completing the project work; and, proposed budget. Proposals are limited to ten (10) pages and 2 attachments. Resumes and Vitae will not be included in the page limit. All proposals should address the following categories and be presented in the order outlined below.

Proposal Contents:

- General Requirements

- Consultant's affiliation
- Federal tax ID number
- Address
- List of people who prepared proposal
- Name, phone number, fax number, email of primary contact responsible for proposal
- Conflicts of Interest
- Organizational Capacity
  - Consultant profile
    - Legal name of consultant
    - Contact information
    - Consultant leadership
    - Number of employees engaged in project
  - Past project performance and experience
    - For each project provide goals of research, scope of project, methodology, deliverables, success of project
- Staff Qualifications and Resumes
  - Education and training summary
    - Description of related services provided
    - Demonstrate competency
    - Resume or Vitae
  - Project management
    - Project Management Plan
    - Staffing plan
      - Principal investigator
      - Co-investigators or partners
  - Data management
  - Data analysis & report writing
- Methodology
  - Conceptual Model
  - Key evaluation objectives
  - Rationale
  - Methodological approach to address each objective
    - Data collection plan and protocol
    - Sampling
    - Analysis plan
    - Anticipated results or outcomes
    - Limitations of evaluation approach
- Human subjects (IRB)
- Resource Allocation
  - Time commitment
  - Systems and facilities available
- Cost summary
  - Budget and budget narrative

*Note:* NCR reserved the right to modify the terms and the schedule set forth herein. Any such modifications will be posted to this website. It is the responsibility of interested parties to monitor this website for any changes.

### **Questions and Communications**

Inquiries about the content of this RFP or the process for submission or evaluation of a proposal may be submitted only by electronic query sent to [RFPinquiries@ncr.org](mailto:RFPinquiries@ncr.org) on or before January 20, 2012. Responses to all inquiries will be posted to the NCR website at: [www.HousingStudyProjectConsultantRFP.org](http://www.HousingStudyProjectConsultantRFP.org) no later than January 23, 2012.

### **Submission Process**

The deadline for submission of proposals is January 31, 2012 at 5PM Eastern Standard Time.

Proposals may be hand delivered, mailed, or delivered by courier to: **National Church Residences, Attn: Michelle Norris, Chief Development Officer, 2335 North Bank Drive, Columbus, OH 43220**, or submitted electronically to: [RFPsubmissions@ncr.org](mailto:RFPsubmissions@ncr.org), but must be received at National Church Residences no later than the stated deadline. Incomplete or late submissions may not be considered. The risk of delay or failure of delivery rests with the submitter.

### **Criteria for Evaluation of Proposals**

Factors to be considered in the evaluation of proposals will include the strength of the proposed strategy for completion of the identified Scope of Work within the identified time frame, relevant experience, references, ability to collaborate with NCR, OHT and NAHT, as well as the proposed budget and will be weighted as set forth below.

1. General Requirements – 5%
2. Organizational Capacity – 10%
3. Staff Qualifications and Resumes – 15%
4. Methodology – 30%
5. Human subjects (IRB) – 5%
6. Project Management – 10%
7. Resource Allocation – 15%
8. Cost summary – 10%

### **Evaluation and Selection Schedule**

Proposals are due by January 31, 2012 at 5PM EST. The evaluation team is expected to review and evaluate all submissions by February 15, 2012. During the evaluation process, the evaluation team may enter into discussions and/or negotiations with the submitter of a proposal for the purpose of clarification and/or correction, including any revisions that may occur during negotiations, to assure a full understanding of, and responsiveness to the requirements, terms, conditions and specifications of this RFP. NCR expects to notify the selected awardee on or about February 15, 2012. NCR retains the right to accept or reject any proposals.

## **Contract**

If this RFP results in a Contract award, the Contract will consist of this RFP, any written addenda to the RFP, the Consultant's accepted Proposal and written authorized addenda to the Proposal, and NCR's general terms and conditions.