



REQUEST FOR PROPOSAL  
Juneau Senior Housing and Services Market Demand Study

February 3, 2014  
Amended February 27, 2014  
Amended March 11, 2014

Juneau Economic Development Council  
612 W. Willoughby Ave., Suite A  
Juneau, AK 99801  
Contact: Margaret O'Neal, Director of Operations  
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moneal@jedc.org

This RFP was prepared in cooperation with the  
Juneau Assisted Living Task Force of the Senior Citizens Support Services, Inc.



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## **PART 1 - BACKGROUND**

For the past 15 years, professionals working in housing and health fields who are familiar with the rapid rise in Alaska's senior population, have been talking about the impending "silver tsunami" heading for Juneau. Over that time, more Juneau residents have been living longer, want to age and live their full lives here, and are hopeful they can do it comfortably, safely and affordably. Supported by reports from the Alaska Commission on Aging, the Juneau Commission on Aging and others, it appears that the silver tsunami has arrived and Juneau is in the midst of a crisis.

### **Some Statistics**

- Alaska's senior population is the fastest growing in the United States.
- Within Alaska, the Mat-Su Valley and Juneau take the lead in that rapid growth.
- In 2010 there were approximately 2,108 seniors, age 65 to 79, living in Juneau. By 2030, it is expected there will be 5,510—a 261% increase.
- It is estimated that Juneau's retired seniors, age 65 and over, contribute over \$100 million annually to the local economy.
- 49% of Juneau's seniors volunteer regularly in the community; 72% belong to local groups and charitable organizations.
- By the end of 2014, every baby boomer will have turned 50.

In the continuum of care for aging elders, there are three typical phases of housing and care that responsive and responsible communities ideally want to provide:

- Affordable, accessible and safe housing where healthy seniors can live independently;
- Affordable housing professionally managed for seniors who need some assistance with daily living needs; and
- Long term nursing care facilities.

Currently in Juneau, there are some apartments for independent seniors, including Fireweed Place and Mt. View Apartments, which are not adequate to satisfy the demand. Juneau has a state owned and operated Pioneer Home, licensed for assisted living, but which primarily provides care for residents experiencing dementia and Alzheimer's disease. The active waiting list at the Pioneer Home is about 115; the long-term waiting list is 1300. There are no current plans for expansion of this facility. There are no other senior assisted living homes or facilities (except for one small private home) in Juneau at this time. For long-term nursing care, Juneau is fortunate to have Wildflower Court, a 57-bed nursing home, which is also full and has a waiting list.

### **Recent Activity**

In response to the impending "tsunami" several local citizens decided to take some action. It appeared to this group that the most pressing senior housing shortage in Juneau, as evidenced by the very long Pioneer Home wait list, is for an assisted living facility dedicated to the elderly. A public meeting was held in June 2013 at which 120 local residents attended and 60 of them offered to help bring assisted living for seniors to Juneau. A Task Force was formed, which meets regularly to work out all the complexities of such a project. These volunteers are fully committed to seeing the project to completion by working with any interested parties who will help make it happen.



In August 2013, Retirement Housing Foundation (RHF) a non-profit organization providing senior housing and assisted living across the nation, visited Juneau for 3 days. The Juneau Assisted Living Task Force facilitated the visit and is continuing the conversation with RHF, while looking at other models and providers both in and outside Alaska.

Over the past several months the Juneau Assisted Living Task Force has worked to develop an RFP for demand study to help it determine size and other features of an assisted living facility that would best meet the needs of Juneau's seniors and a potential operator. During that process the group also determined that a broader sense of the market demand for all types of senior housing from owner-occupied one-story, accessible homes to nursing homes and all the various types of supportive services that could augment seniors aging in place, would help Juneau plan for its growing senior population's housing needs over the next twenty years.

In January 2014 the Task Force merged with Senior Citizens Support Services, Inc. (SCSSI) which provides it a 501-c-3 status and thus expands its opportunities for collaborations and funding to help meet its goal to establish senior assisted living housing and services.

### **Supporters**

Besides many local adult citizens of all ages, the Assisted Living for Seniors Task Force (ALTF) is actively supported by the

- Juneau Economic Development Council (JEDC)
- Juneau Community Foundation (JCF)
- Senior Citizens Support Services, Inc. (SCSSI)
- Juneau Commission on Aging (JCoA)
- Skaggs Investments

In addition, the City and Borough of Juneau, by its Mayor and Assembly members, the Community Development Director, the Lands Manager and the City Manager, have vocally recognized and helpfully supported how to meet the need for senior assisted living housing and care.

Other entities and parties who have expressed interest and support include:

- Community Resource Network (local social service & health care providers)
- Mental Health Trust Authority
- Alaska Housing Finance Corporation
- Bartlett Regional Hospital
- Tlingit Haida Regional Housing Authority
- Southeast Alaska Independent Living (SAIL) & Aging & Disability Resource Center
- United Human Services
- State of Alaska Department of Health & Social Services, Division of Seniors and Disability Services
- some local land owners
- Juneau's three state legislators



## **PART 2 – STANDARD RFP TERMS**

### **1. Cancellation**

Awards, contracts, and extensions may be canceled for convenience by the Juneau Economic Development Council (JEDC) at any time. In the event of termination of contract the JEDC will be responsible only for those services that have been delivered and accepted according to the RFP requirements.

### **2. Rights Reserved**

The JEDC reserves the right to accept or reject any and/or all parts of responsive proposals received and/or to reject all proposals submitted. The JEDC reserves the right to award any resulting contract in the manner that is in its best interest. The JEDC reserves the right to waive any technicalities or minor irregularities in responses received and to award the contract in the most beneficial manner for its stakeholders and itself.

The JEDC reserves the right to request and negotiate a “best and final” response from vendors.

### **3. No Obligation/No Award Guaranteed/Cost to Propose**

The contract, if any, will be awarded to the Offeror whose proposal offers the best value to the JEDC in meeting the required scope of work described herein with appropriated funds available. No obligation or commitment is incurred by the JEDC from the receipt of any proposal. There is no guarantee that any Offeror will receive an award as a result of submitting a proposal. Any/all costs incurred by the Offeror in preparation and submission of this proposal are the sole responsibility of the Offeror.

### **4. Conditional Proposals**

Proposals that are conditional and/or in any way qualify or vary the terms of these instructions, conditions, and specifications shall be considered non-responsive and disqualified.

### **5. Respondent Failure**

In the event services to be furnished by the successful Offeror should for any reason fail to conform to the scope of work contained herein, the JEDC reserves the right to reject the services and further reserves the right to terminate the contract.

### **6. Non-Assignment**

The successful Offeror may not assign the award or contract to or subcontract with another party without the express written permission of the JEDC.

### **7. Proposal Delivery**

Proposal responses will be received at the Juneau Economic Development Council between the hours of 9:00 am and 5:00 pm, Monday through Friday, excluding holidays.

The JEDC is not responsible for misdirected mail, mail not received or mail delivered late by any carrier.



Proposals received after the stated deadline shall be considered non-responsive and will be rejected.

RFP responses received via email or fax will not be accepted.

Proposals delivered to any address other than the address indicated in this RFP shall be considered non-responsive and will be rejected.

Properly identified and sealed proposals must be addressed as shown below.

**“Proposal-Senior Housing and Senior Services Market Demand Study”**

**Attention: Margaret O’Neal, Director of Operations**

**Juneau Economic Development Council**

**612 W. Willoughby Ave., Suite A**

**Juneau, AK 99801**

## **PART 3 - GENERAL INFORMATION**

### **1. Objectives**

The Juneau Economic Development Council (JEDC) is soliciting proposals from qualified and experienced Consultants to conduct a senior housing and senior services Market Demand Study, inclusive of community asset research, focus groups, community meetings, potential housing locations, a list of recommended next steps and a final assessment report. The study must be conducted to determine the demand within the City and Borough of Juneau, taking into consideration senior housing and services and senior populations within the Northern Southeast Alaska<sup>1</sup> region to the extent necessary to estimate the demand for Juneau-based housing and support services from seniors residing in other communities. The successful Offeror will work with JEDC staff, the Juneau Assisted Living Task Force within SCSLI, local government, private-non-profit partners, Native health care and housing organizations, the supporters listed above, other social service and housing-focused stakeholder groups, and possibly other Consultants to ensure that a comprehensive and thorough analysis and report is compiled.

### **2. Procurement Process**

The procurement will be formally and informally advertised. Proposals must be responsive to all aspects of this RFP. Proposals in response to this RFP must be delivered on time and in the format and at the location specified below. Cost proposals shall not exceed \$45,000<sup>2</sup>. JEDC expects to award a contract to

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<sup>1</sup> Northern Southeast Alaskan communities which the Juneau Assisted Living Task Group considers more likely to have seniors likely to move into a Juneau-based assisted living facility include Skagway, Haines, Tenakee Springs, Pelican, Elfin Cove, Angoon, Hoonah and Kake.

<sup>2</sup> In the event the \$45,000 cost limitation is insufficient to meet the objectives of the RFP, see Section 5, Item 3e.



the successful Offeror on or around March 31, 2014. The period of performance shall be approximately 4 months with a draft study report to be delivered three weeks prior for review and comment.

### 3. Proposal Timeline - RFP Process

<u>When</u>	<u>Who</u>	<u>Task/Deadline</u>
6:00 pm Friday, February 14, 2014	Offerors	Optional statement of interest by email
6:00 pm Friday, February 21, 2014	Offerors	Deadline to submit questions by email
2:00 pm Tuesday, February 25, 2014	JEDC/Offerors	Optional Pre-Proposal Teleconference - Dial in 1-800-747-5150, Access code: 06122#.
Thursday, February 27, 2014	JEDC	Electronic and teleconference questions will be summarized and written responses will be emailed to all vendors who have submitted questions or provided email addresses.
5:00 PM Thursday, March 27, 2014	Offerors	Deadline to submit proposals
Monday, March 31, 2014	JEDC	Review committee receives proposals and begins scoring
Thursday, April 03, 2014	JEDC/Offerors	Offerors may be requested to respond to clarification questions by telephone
Friday, April 04, 2014	JEDC	Review committee completes evaluation and scoring
Monday, April 07, 2014	JEDC	Notice of Intent to Award Contract
Week of Monday, April 07, 2014	JEDC/Offerors	Contract Negotiation
Monday, April 14, 2014	JEDC/Offerors	Contract Awarded

The successful Offeror will begin the provision of services upon execution of a professional services contract. Contract terms and conditions may be negotiated by the JEDC and the successful Offeror.

### 4. Format Requirements

The format requirements for RFP responses are designed to ensure uniformity in the information necessary to understand each Offeror’s proposal, and facilitate an efficient and comprehensive evaluation of all responses. Proposals must comply with the specifications and detailed instructions stated in this RFP document, must be signed by the certifying company official, and must be presented to the Juneau Economic Development Council according to the detailed instructions stated in this document.

Proposals must be presented in writing, printed on standard letter size paper in at least 10 point font. All attachments must be identified properly for easy recognition and association. Offerors are required to submit one (1) original and four (4) copies of the proposal along with the proposal copied on to a USB flash drive.

Each proposal must contain the following:



1. A cover letter signed by the person authorized to bind the Offeror to the terms of the Proposal and the Terms of the RFP including the Standard Terms (which may be certified by reference), stating the price proposal shall be good for 90 days, and listing the Offeror's contact details, including:
  - Company Name
  - Company Address
  - Telephone
  - Name & Title of Certifying Company Official
  - Telephone
  - Email Address
  - Offeror's certification whether or not their proposal is in complete compliance with the stated requirements. If there are any deviations from these requirements, Offerors must indicate in writing within the cover letter what the exact deviations are and what actual services will be provided.
2. Offerors must submit evidence of a valid Alaska business license with the proposal.
3. Offerors must submit a signed W-9 with their proposal.
4. Proposals shall include a detailed Table of Contents.
5. Five printed copies of the proposal including all exhibits.
6. A USB flash drive with an electronic copy of every document submitted with the proposal.

JEDC prefers proposals which succinctly yet comprehensively demonstrate deep understanding of the need and objectives of the RFP and also show how the work will be done and results will be communicated. JEDC is a highly collaborative organization and works closely with many stakeholder groups. Proposals which fit into this manner of working are preferred.

Proposals must be submitted in a sealed container plainly addressed as follows:

**Margaret O'Neal, Director of Operations**  
**"Proposal-Senior Housing and Senior Services Market Demand Study"**  
**Juneau Economic Development Council**  
**612 W. Willoughby Ave., Suite A, Juneau, AK 99801**

RFP responses will NOT be accepted at any other location.





## 5. Proposal Contact Person

The assigned contact person for Offerors is Margaret O’Neal at the address above. She may also be reached at 907-523-2326 or [moneal@jedc.org](mailto:moneal@jedc.org).

## 6. Questions & Answers

It is intended that this RFP be adequate for any vendor to respond to the JEDC’s requirements. However, should Offerors have questions; they should be submitted electronically by email to [moneal@jedc.org](mailto:moneal@jedc.org). Answers to electronically submitted questions will be provided at the optional pre-proposal teleconference on, at which time vendors may also ask other questions. JEDC will summarize all questions and provide written answers to the questions asked via email to vendors who have provided email addresses, including those who submitted electronic questions, whether or not they participate in the optional pre-proposal teleconference. Questions received after the stated electronic submission deadline and the pre-proposal teleconference will not be considered. **All deadlines and dates related to questions and answers are detailed above at 3. Proposal Timeline - RFP Process.**

## 7. Discussions with Offerors

JEDC may conduct discussions with Offerors in order to determine if a proposal is reasonably susceptible for award. Such discussions between the Offeror and JEDC staff are permitted to clarify uncertainties or eliminate confusion concerning the contents of a proposal and which do not result in a material or substantive change to the proposal.

JEDC may also conduct discussions with Offerors for the purpose of ensuring full understanding of the requirements of the RFP and proposal. Discussions will only be held with Offerors who have submitted a proposal deemed reasonably acceptable for award by JEDC.

Offerors with a disability needing accommodation should contact JEDC prior to the date set for discussions so that reasonable accommodation can be made. Any oral modification of a proposal shall be submitted in writing by the Offeror.

## 8. No Protest

JEDC intends to use the process described within this RFP to fully and fairly evaluate all responsive proposals. Following evaluations by the Review Committee, the final decision to select the best proposal, to negotiate the terms of a professional services contract or to refuse all proposals, shall be made by JEDC in its sole and absolute discretion.

## 9. Disclosure of Proposal Contents

All proposals and other material submitted become the property of JEDC and may be returned only at JEDC’s option. All proposal information will be held in confidence during the evaluation process and prior to the time a Notice of Intent to Award is issued. Trade secrets and other proprietary data contained in proposals may be held confidential if the Offeror requests, in writing, and JEDC agrees, in writing, to do so. Material considered confidential by the Offeror must be clearly identified, and the Offeror must include a brief statement that sets out the reasons for confidentiality.



## **PART 4 – GENERAL REQUIREMENTS**

### **1. Insurance Requirements**

Certificate of Insurance / Accord Form required with solicitation submittal.

The successful Offeror, hereafter “Consultant” shall procure and maintain throughout the term of this Agreement a policy or policies of insurance providing coverage as set forth below that shall protect the Consultant and the JEDC from any claims for bodily injury, property damage, or personal injury which may arise out of Consultant’s operations under this Agreement. Liability coverage and limits are outlined below.

Consultant agrees to carry insurance coverage in the amounts of at least \$1,000,000 per occurrence for Commercial General Liability and Automobile Liability. Consultant shall also carry Workers’ Compensation coverage with statutory limits for the jurisdiction within which the facility is located and \$1,000,000 in Employers’ Liability.

Such insurance shall include the Juneau Economic Development Council, its directors, officers, and employees as an additional insured, and shall not be reduced or canceled without 30 days written prior notice delivered to the JEDC. Consultant shall provide the JEDC with a certificate of insurance as evidence of insurance protection provided. Insurance certificates provided by any insurance company or underwriter shall not contain the language “endeavor to” and “but failure to mail such notice shall impose no obligation or liability of any kind upon the company” or similar language. Consultant’s insurance coverage shall be primary noncontributing insurance as relates to any other insurance or self-insurance available to the JEDC, its officials, employees, agents or volunteers. Any insurance or self-insurance maintained by the JEDC, its officials, employees or volunteers shall be excess of the Consultant’s insurance and shall not contribute with it.

### **2. Indemnification**

The Consultant will be required to indemnify, defend and hold harmless JEDC and its directors, officers, employees and volunteers from and against any and all liability loss, damage, expense, and costs (including without limitation litigation costs and attorney fees) of every nature arising out of or in connection with Consultant’s performance of this contract or its failure to comply with any of its obligations contained in the contract, except such loss or damage caused by the sole negligence or willful misconduct of the JEDC.

Consultant shall also indemnify JEDC of any adverse determination made by the Internal Revenue Service or the State of Alaska against JEDC with respect to Consultant’s independent Consultant status that would establish a liability for failure to make social security or income tax withholding or worker’s compensation insurance.

### **3. Contract Terms**

A contract confirming compensation, deliverables, delivery dates, reporting requirements, payment schedule and other terms shall be signed by the parties. The contract price must be held firm for the



entire term of the contract.

Any change of the project team members named in the proposal must be approved, in advance and in writing, by JEDC. Personnel changes that are not approved by JEDC may be grounds for JEDC to terminate the contract.

The JEDC reserves the right to terminate any resulting contract for convenience or lack of funding. In the event of contract termination by the JEDC, the JEDC will be responsible only for those services and deliverables that have been received and accepted. Non-performance of contract terms will give sufficient cause for the JEDC to cancel the contract. Non-performance shall be construed to include, but is not limited to, failure of the Consultant to deliver in the time specified or in the manner required.

The Consultant is responsible for the completion of all work set out in the contract. All work is subject to inspection, evaluation, and approval by JEDC. JEDC may employ all reasonable means to ensure that the work is progressing and being performed in compliance with the contract. Should the JEDC determine that corrections or modifications are necessary in order to accomplish its intent, JEDC may direct the Consultant to make such changes. The Consultant will not unreasonably withhold such changes.

Substantial failure of the Consultant to perform the contract may cause JEDC to terminate the contract. In this event, JEDC may require the Consultant to reimburse monies paid (based on the identified portion of unacceptable work received) and may seek associated damages.

#### **4. Ownership Rights**

The JEDC shall retain ownership rights to the contents of all documents, supporting literature, and data submitted by Offerors to this Request for Proposal.

#### **5. Non-Collusion**

Offerors shall fully certify that they, as individuals or as officials of a business entity, have not entered into any agreement, participated in collusion, or otherwise taken any action in restraint of free and competitive responses to this Request for Proposal. Further, Offerors guarantee that their response is not made in conjunction with or on behalf of another party and that they have not been directly or indirectly induced in any manner or taken any action to result in a restriction of trade or in an unfair advantage.

#### **6. Conflict of Interest**

Each proposal shall include a statement indicating whether or not the firm or any individuals working on the contract has a possible conflict of interest with JEDC or its cooperating parties and, if so, the nature of that conflict. JEDC reserves the right to cancel the award if any interest disclosed from any source could either give the appearance of a conflict or cause speculation as to the objectivity of the work product to be developed by the Offeror. JEDC's determination regarding any questions of conflict of interest shall be final.



## 7. Non-Disclosure

Information made available to respondents by the JEDC shall be used only for purposes related to responding to this RFP and shall not be used for any other purpose without the express written consent from the JEDC. Respondents to this RFP unequivocally agree to assume responsibility for protecting and safeguarding the confidentiality of the JEDC records that are not public information.

# PART 5 - SCOPE OF WORK

## 1. RFP Need

Please refer to Part 1 – Background.

The Juneau Senior Housing & Services Market Demand Study will explore and identify current and emerging senior housing and senior support service challenges within the City and Borough of Juneau including housing affordability, adequacy, suitability, availability, and accessibility. This study will provide a better understanding of the area's current senior housing needs, particularly the need for additional Juneau-based assisted living units for seniors. It will assess issues and challenges faced by Juneau that impact the community's ability to meet the housing and service needs of seniors. It will provide direction to the community, local government, developers, non-profits, and other interested stakeholders. It will potentially support future funding opportunities for senior housing including affordable senior housing projects. The study will also investigate the existing senior housing and support services and the related demand of senior populations of other communities located in Northern Southeast Alaska to the extent those communities' senior needs can realistically be expected to be met with services and housing located in Juneau.

## 2. Scope of Work

The Juneau Senior Housing & Services Market Demand Study shall combine quantitative (statistical) data analysis with targeted key person/group interviews and focus group meetings (qualitative) analysis in order to identify and explore:

- Senior citizen population and demographic trends;
- Changing household incomes;
- Senior housing supply/demand across the whole continuum of senior housing types<sup>3</sup>;
- Senior housing issues related to affordability, adequacy, suitability, availability, and accessibility;
- Senior services supply/demand; and
- Other indicators of housing/economic hardship where data is available; and
- Impacts that the senior community may be experiencing as a result of inadequate affordability and availability of housing and service options.

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<sup>3</sup> See Below 5. Glossary of Terms Relevant to Senior Housing and Senior Services



The following should be used in the development of the study:

### **a. Purpose**

The Juneau Senior Housing & Services Market Demand Study shall identify and explore current and projected challenges related to and demand for various types of senior housing and senior support services in the City and Borough of Juneau and communities in the Northern Southeast Alaska, including:

- Senior housing availability and affordability (affordability refers to households or individuals who pay more than 30% of their before-tax income on housing);
- Senior housing accessibility (the degree to which housing meets the needs of persons with health, mobility or stamina limitations);
- Senior housing suitability (size of unit, clientele mix, adequacy of associated care provided);
- Senior housing adequacy (health and safety of the home);
- Senior housing proximity (community based housing that is close to shopping, senior nutrition centers, adult day care, medical facilities, public transportation, etc.); and
- Senior services availability and affordability (whether community-based services support senior independent living and/or assist in their care).

### **b. Study Objectives**

Of primary interest is the acquisition of accurate and comprehensive data that will be provided to potential assisted living home developers and operators. The desired outcome is that the current strongly perceived need is adequately described and sufficiently quantified to attract investment and result in a new assisted living facility for seniors in Juneau. Determining the current and projected demand for other types of senior housing and community based senior services are also of great interest. Broadly, the objectives of the study are to:

- Assess the adequacy of Juneau’s current inventory of all types of senior housing and senior support services in relation to current demand and utilization;
- Gain a better understanding of the area’s current senior housing needs, issues and challenges;
- Provide direction to local government, developers, non-profits, community groups and interested stakeholders on senior housing and senior service’s needs;
- Estimate the demand and absorption rate for new senior housing by type of facility;
- Provide information that would support future funding applications for affordable senior housing projects;
- Provide a basis for the development of a senior housing plan which shall include strategies and goals and an action plan while projecting senior housing needs 10-15-20 years into the future;
- Identify place-based senior service business opportunities for entrepreneurs;
- Make recommendations on types, and sizes and range of facility amenities for new senior housing facilities or other senior housing development to be constructed in the following categories:
  - i. Units where seniors can live independently (both rental and owner-occupied)
  - ii. Housing with services for seniors who need daily living assistance, including Alzheimer’s/Memory Care
  - iii. Long-term nursing care facilities
- Make recommendations about community-based services most needed;



- Identify potential funding sources that support senior housing projects; and
- Recommend how local government can allocate resources to meet the housing and support services needs of Juneau’s seniors.

### **c. Study Methodology**

The methodology to be used in development of the Juneau Senior Housing & Services Market Demand Study shall combine quantitative (statistical) data analysis with targeted key person/group interviews and investigative benchmark interviews and/or focus group meetings (qualitative) analysis in order to identify and explore:

- Population and demographic trend
- Senior housing supply or all types (See Glossary) including assisted living and assisted living with Alzheimer’s/Memory care units
- Senior housing affordability, adequacy, suitability, availability and accessibility
- Adequacy of senior support services ancillary to and associated with housing
- Other indicators of senior housing and economic hardship where data is available
- Impacts that the communities may be experiencing as a result of declining or inadequate senior housing affordability and choice
- Impacts the communities will face as senior populations grow over the next 10-15-20 years

Proposals must include a plan for engagement with and communication about progress to the JEDC and other stakeholder groups whose input and data are necessary for completion of the project.

In general, Offerors responding to this RFP are encouraged to be very specific and detailed in their responses to the Scope of Work identified above. Responses to this RFP will be evaluated for proposal quality, comprehensiveness, responsiveness, creativity and cost effectiveness of the Consultant’s approach.

Examples of some appropriate approaches for determining demand and the challenges faced, are provided for consideration by Offerors.

- Proposals may include a statistically relevant household survey of seniors aged 66 and over as part of the statistical data analysis of the demand for different types of senior housing and the services most likely to be used by seniors. Offerors should detail methodology and approach for this component of the work.
- Inventory and catalog the current range of senior care services and facilities, including development plans, to determine occupancy and utilization rates and trends, in Juneau and Northern Southeast Alaska to provide a good working knowledge of the range of options available to seniors. The inventory shall identify housing availability, amenities, costs and services gaps (due to price and/or supply) and explore unmet needs of current and future seniors.
  - Determine Juneau’s current unmet need (waitlists) for existing housing and services. It is expected the Consultant shall conduct interviews with operators and referring agencies to determine occupancy/utilization for housing/beds.

- Define current demand, by age ranges and type of housing/services that seniors say they need and desire, including identification of the demand triggers that compel seniors to seek specialized housing or services including those with Alzheimer’s disease and dementia-related conditions.
- Describe the universe of seniors within Juneau and Northern Southeast Alaska that may require assisted living services in Juneau now, and within the next twenty years. The description shall characterize the socio-economic status of seniors and future seniors, assess awareness and perceptions of available senior housing and services. Include the most typical types of services required by: 1) seniors needing assistance with daily living now; and 2) seniors anticipating or expecting need for services within next 10 years.
- Evaluate the availability and sufficiency of qualified workers to provide senior services and housing from caregivers, skilled nursing and administrative personnel and/or other community/location-based assets. The evaluation shall identify current training and support for workers who give in-home care and/or work in assisted living and nursing facilities and noting gaps/lack of training by:
  - Interviewing operators of some assisted living facilities (most are single-facility operators) within Alaska and multiple-facility (regional or national) operators of assisted living facilities and/or nursing homes to find out what skill-sets are needed; and
  - Compiling data from occupational licensing data, local employers, and degrees issued from the UAA/UAS nursing program.
- Describe the regulatory framework and licensing criteria for senior assisted living facilities including, but not limited to:
  - Independent Living and/or Congregate Living (IL with some supportive and shared services such as housekeeping, transportation, some shared meals, etc.)
  - Home Health Care
  - Adult Day Care
  - Assisted Living
  - Assisted Living Special Care Units (for seniors with dementia/Alzheimer’s)
  - Nursing Homes/Rehabilitation Center
- Identify national norms for demand, if there are national statistics, and/or identify demand based on model communities with a broader array of senior housing and support services to:
  - Estimate future demand (10-15-20 year) by senior age range and type of housing/services for different senior housing facility types (Independent/Congregate Living, Assisted Living, Assisted Living with Special Care Units, and Nursing Homes/Rehabilitation Centers)
  - Estimate potential current demand
  - Determine projected demand for existing services and potential demand for housing/services not in place now
  - Evaluate the current and anticipated unmet demand (based on occupancy or utilization rates, numbers served, waitlists, etc.)



- Include an analysis to estimate the percentage of the universe of income-qualified seniors that could be expected to enter various types of senior housing if units were available. It is expected the analysis would include, but not be limited to :
  - Utilize demographic and economic data
  - Conduct a household survey
  - Use survey data, current usage data and normative data to test the reasonableness of Juneau’s current base demand level and the range of demand between current and potential housing and services in future years for seniors at different age ranges.
- Graphically map the continuum of care pathways for Juneau’s seniors now and for different scenarios based on normative demand and Juneau residents’ survey demand for the most indicated housing and service options.
- Characterize the typical costs of senior care and housing, based upon business costs in Alaska, across Juneau’s household income ranges and identify the sources of income typically used to cover these costs.

### **3. Proposal Submission Requirements**

The Proposal must include the following information, at a minimum:

#### **a. Cover Letter**

A cover letter introducing the firm, outlining the attachments and naming the individual who will be the single point of contact for contract negotiation and administration.

#### **b. Organizational Qualifications & Capacity**

Provide a brief description of the Offeror, including the number of employees, location of the office from which the services will be performed, and how this work fits into the firm’s overall work plan. Include similar description for any sub Consultants included in the proposal. Discuss prior experience in performing similar work. Provide project summaries of work performed that is similar to or the same as what is required in this RFP. A minimum of three (3) professional references, for similar types of work performed. Include contact name, number and email address and the type of project completed. Reference checks will be conducted by the JEDC.

#### **c. Qualifications of assigned individual(s)**

Provide a brief summary of the qualifications and experience of each member of your staff/team who may be assigned to this work, including length of services with the firm, and prior experience in the specific areas required for this project. Include resumes for all personnel who will provide material services, including any sub Consultants. Provide an organization chart for the project including project manager and listing primary responsibilities of team members.

#### **d. Communications Plan**

Describe in the proposal the plan for engagement with JEDC, team members and stakeholders throughout the process and how progress reporting will be handled. Representative copies of reports,





communications and other documents may be provided to demonstrate the following qualifications:

- Proficiency in timely, comprehensive oral and written communications to all parties involved in the project
- Familiarity with format for progress reports and documents
- Familiarity with cost and scheduling of similar projects

#### **e. Cost Proposal & Payment Schedule**

Detail the proposed fee and payment schedule for completing this work. Include the fully-burdened hourly rate of each team member, the hours dedicated to the project for the various tasks or project phases outlined in the methodology, staff time coordination, and all project expenses including travel, meals, meetings and overhead. JEDC will not provide a work space for the Consultant or Consultant's staff. JEDC may provide meeting space for public meetings, if convenient. Proposals must include all costs associated with the completion of the project; be detailed and precise as this information may be used during contract negotiations, if necessary. Describe any value added components to the proposal.

In the event the \$45,000 cost limitation is insufficient to meet the objectives of the RFP, Offerors are encouraged to break the project into logical phases and submit a proposal for a greater amount provided

- a) the proposal details a work plan and that can be accomplished for \$45,000;
- b) the proposal similarly details work plans with itemized costs for the remaining phases of work required in the RFP; and
- c) the market demand assessment for senior assisted living with and without Alzheimer's/Memory Care along with associated senior services are included in the first phase of the proposal.

It is helpful if the cost proposal relates to the project timeline and/or work product delivery or key benchmarks.

#### **4. Evaluation Criteria**

Each proposal received will be evaluated and a determination will be made if it meets the minimum requirements stated herein. Failure to meet the minimum requirements will be grounds for elimination of the proposal from further consideration. All proposals will be evaluated for how well they demonstrate understanding of the purpose and goals of the proposal, business strength, qualifications, expertise, demonstrated experience and highest and best value to the JEDC consideration to quality, approach, timeliness, dedicated personnel, and value added (if any). Proposal conformance to RFP instructions, terms, conditions, and requirements is critical to Offeror responsiveness.

The JEDC may, at its sole discretion, select or reject all or portions of the service(s) proposed from responsive Offerors. As a part of the evaluation process, the JEDC may find it necessary to evaluate the addition or deletion of components of an Offeror's proposal in order to make equivalent comparisons to other proposals. The JEDC will select the Offeror whose proposal best meets the needs of the JEDC, based on the requirements and evaluation criteria set forth herein.

The determination of the successful proposal will be based upon information supplied by the Offeror in the RFP response and upon other information that will be obtained by the JEDC as it deems necessary.



The lowest-cost proposal submitted may not necessarily be determined to be the most responsive proposal when all factors have been considered. However, the quoted price is an important factor in the determination of the selected proposal.

Evaluation of the proposals will be made by a Review Committee comprised of community based stakeholders, non-profit participants and the JEDC staff. In addition to evaluating the written proposals, oral interviews may be required.

Proposals will be evaluated, generally, on the following criteria.

- Firm’s experience with the work described in the Scope of Work section above.
- Proposed project methodology and fee structure that is the most advantageous to the JEDC
- Qualifications, experience and availability of staff dedicated to the project
- Reference checks
- Firm is not debarred or suspended from federal financial assistance program activities

Below are the Evaluation Criteria and the scoring weight assigned to each criterion.

Criteria	Weight
<p><b>Experience and Professional Qualifications</b></p> <ul style="list-style-type: none"> <li>• Specific experience and understanding of regional planning and needs analysis</li> <li>• Specific experience in housing Market Demand Study</li> <li>• Specific experience assessing senior service needs</li> <li>• Specific experience in collecting and analyzing community data, including, but not limited to, household surveys</li> <li>• Specific experience in creating dialogue and gathering input from key community stakeholders and audiences</li> <li>• Expertise in quantitative and qualitative measurement</li> <li>• Experience in research design and implementation</li> </ul>	25%
<p><b>Methodology Used for the Project</b></p> <p>Proposals will be evaluated against the questions set out below:</p> <ul style="list-style-type: none"> <li>• Does the methodology depict a logical approach to fulfilling the requirements of the RFP?</li> <li>• Does the methodology match and contribute to achieving the objectives set out in the RFP?</li> <li>• Does the methodology interface with the time line in the RFP?</li> </ul>	30%

Criteria	Weight
<p><b>Communications</b></p> <ul style="list-style-type: none"> <li>• Does the Proposal provide ongoing communications strategy and plan that will facilitate project monitoring and stakeholder engagement?</li> <li>• Is it clear who will do what and how project team communication/stakeholder interface will occur?</li> <li>• Does the Proposal demonstrate proficiency in timely, comprehensive oral and written communications to all parties involved in the project</li> <li>• Familiarity with format for progress reports and documents</li> <li>• Familiarity with cost and scheduling of similar projects</li> </ul>	15%
<b>Cost vs. Value</b>	30%

## 5. Glossary of Terms Relevant to Senior Housing and Senior Services

### Activities of Daily Living (ADLs):

Everyday activities such as bathing, grooming, eating, toileting, and dressing.

### Adult Day Care:

Daily structured programs in a community setting with activities and/or health-related and rehabilitation services to elderly who are physically or emotionally disabled and need a protective environment. This care is provided for during the day, the individual returning home for the evening.

### Alzheimer’s or Memory Care:

Alzheimer's, dementia and memory care are often provided in a secure assisted living or nursing home setting, usually in a separate floor or wing, sometimes called “Special Care Units.” Residents may live in semi-private apartments or private rooms and have structured activities delivered by staff members trained specifically on caring for those with memory impairment.

### Assisted Living:

In general, state-licensed program offered at a residential community with services that include meals, laundry, housekeeping, medication reminders, and assistance with Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs). The exact definition will vary from state to state, and a few states do not license assisted living facilities. Generally regarded as one to two steps below skilled nursing in level of care. Approximately 90 percent of the country's assisted living services are paid for with private funds, although some states have adopted Medicaid waiver programs. Might also be referred to as Personal Care, Board and Care, Residential Care, Boarding Home, etc.,

Amenities in assisted living typically include:

- Three meals a day served in a common dining area
- Housekeeping services
- Transportation
- 24-hour security



- Exercise and wellness programs
- Personal laundry services
- Social and recreational activities

Personal care in assisted living typically includes:

- Staff available to respond to both scheduled and unscheduled needs
- Assistance with eating, bathing, dressing, toileting, and walking
- Access to health and medical services, such as physical therapy and hospice
- Emergency call systems for each resident's apartment
- Medication management
- Care for residents with cognitive impairments

#### **Community Based Services:**

This is a wide array of services that can help elderly maintain independence and/or provide support for families caring for an elderly family member outside of a senior housing facility. These can include:

- Adult day care centers
- Alarm and security system providers
- Cleaning, laundry and housekeeping services
- Companions (in home and travel)
- Elder law and estate attorneys
- Home maintenance, landscape and repair specialists
- Home care helpers
- Hospice and palliative care
- Meal preparers
- Medical assistants
- Medical supplies and equipment providers
- Nurses and nursing assistants
- Personal care assistants
- Pet and vet services
- Physical and occupational therapists
- Benefits counselors
- Transportation services (Care-a-van)
- Universal design consultants

**Congregate Housing:** See Independent Living (may be also referred to as Supportive Housing).

#### **Continuing Care Retirement Community (CCRC):**

Housing planned and operated to provide a continuum of accommodations and services for seniors including, but not limited to, independent living, congregate housing, assisted living, and skilled nursing care. A CCRC resident contract often involves either an entry fee or buy-in fee in addition to the monthly service charges, which may change according to the medical services required. Entry fees may be partially or fully refundable. The fee is used primarily as a method of privately financing the development of the project and for payment for future healthcare. CCRCs are typically licensed by the state. See also Life Care Community.



**Continuum of Care:**

Full spectrum of care available at Continuing Care Retirement Communities which may include Independent Living, Assisted Living, Nursing Care, Home Health, Home Care, and Home and Community Based Services.

**Convalescent Home:**

See Nursing Home.

**Home Health Care:**

Provision of medical and nursing services in the individual's home by a licensed provider.

**Hospice Care:**

Care and comfort measures provided to those with a terminal illness and their families- it can include medical, counseling, and social services. Most hospice care is furnished in-home, while specialized hospices or hospitals also provide this service.

**Independent Living:**

Multi-unit senior housing development that may provide supportive services such as meals, housekeeping, social activities, and transportation (Congregate Housing, Supportive Housing, Retirement Community). Independent Living typically encourages socialization by provision of meals in a central dining area and scheduled social programs. May also be used to describe housing with few or no services (Senior Apartment).

**Instrumental Activities of Daily Living (IADLs):**

Day-to-day tasks such as preparing meals, shopping, managing money, taking medication, and housekeeping.

**Life Care Community:**

A Continuing Care Retirement Community (CCRC) which offers an insurance type contract and provides all levels of care. It often includes payment for acute care and physician's visits. Little or no change is made in the monthly fee, regardless of the level of medical care required by the resident, except for cost of living increases.

**Nursing Home:**

Facility licensed by the state that provides 24-hour nursing care, room and board, and activities for convalescent residents and those with chronic and/or long-term care illnesses. One step below hospital acute care. Regular medical supervision and rehabilitation therapy are mandated to be available, and nursing homes are eligible to participate in the Medicaid program. May be referred to as Nursing Facility or Convalescent Home. See also Skilled Nursing Facility.

**Rehabilitation Facility:**

A transitional residential facility which offers therapeutic care for persons requiring intensive physical, occupational, or speech therapy.

**Residential Care:**

See Assisted Living.

**Respite Care:**

Temporary relief from duties for caregivers, ranging from several hours to days. May be provided in-home or in a residential care setting such as an assisted living facility or nursing home.

**Senior Apartment:**

Age-restricted multiunit housing with self-contained living units for older adults who are fully able to care for themselves. Usually no additional services such as meals or transportation are provided.

**Senior Center:**

A community center which may or may not be located within a senior housing facility which provides a range of services for nutrition, wellness, socialization and education, including:

- Educational and arts programs
- Employment assistance
- Health, fitness, and wellness programs
- Information and assistance
- Intergenerational programs
- Meal and nutrition programs
- Public benefits counseling
- Social and recreational activities
- Transportation services
- Volunteer and civic engagement opportunities