



CITY OF
PORTLAND, OREGON
PORTLAND HOUSING BUREAU

Nick Fish, Commissioner
Margaret Van Vliet, Director
421 SW 6th Avenue, Suite 500
Portland OR 97204
(503) 823-2375
Fax (503) 823-2387
www.portlandonline.com/PHB

HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA)

**SUPPLEMENTAL SECURITY INCOME/SOCIAL SECURITY DISABILITY
INSURANCE (SSI/SSDI) OUTREACH, ACCESS AND RECOVERY**

APRIL 2010 REQUEST FOR PROPOSALS

AMOUNT AVAILABLE: \$140,000

PROPOSALS DUE: Monday, May 3rd by 4:00 p.m. PST

Submit one (1) original and 4 complete copies of the Proposal to:

City of Portland
Attn: Dawn Martin
Portland Housing Bureau
421 SW Sixth Ave., Suite 500
Portland, OR 97204

Refer questions to:

Dawn Martin, HOPWA Administrator
Phone: 503-823-2378
Email: dawn.martin@portlandoregon.gov

SOAR: SSI/SDDI Outreach, Access, and Recovery RFP

The Portland Housing Bureau (PHB) is seeking proposals for a program that will provide expedited access to Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) for persons living with Human Immunodeficiency Virus or Acquired Immune Deficiency Syndrome (HIV/AIDS) in the Portland Eligible Metropolitan Statistical Area (EMSA).

SUMMARY

In 1994 Portland area jurisdictions qualified as an EMSA for Housing Opportunities for Persons with AIDS (HOPWA) when 1500 cumulative AIDS cases were identified. The EMSA comprises of seven counties including Multnomah, Washington, Clackamas, Yamhill, and Columbia Counties in Oregon, and Clark and Skamania Counties in Washington. The formula grant for FY 2010 is \$1,088,055.

The HUD Office of HIV/AIDS reports that receiving SSI and/or SSDI is very beneficial for extremely low-income persons with HIV/AIDS. The modest income from Social Security Administration (SSA) programs makes it possible for beneficiaries to obtain housing, supportive services, and access to medical care. Since many HUD supportive housing programs require a tenant contribution of the tenant's income, SSI or SSDI benefits would provide HOPWA with some revenue to offset program costs and, thereby, serve more individuals.

In 2008, the Office of HIV/AIDS Housing contracted with the Center for Urban Community Services (CUCS) and Policy Research Associates (PRA) to develop a curriculum comparable to Stepping Stones to Recovery (SSR) to assist People Living with HIV/AIDS (PLWHA) with applying for social security disability benefits. In 2009, The Office of HIV/AIDS Housing made SOAR a HOPWA national initiative. The goal of the HOPWA SOAR initiative is to help adults living with HIV/AIDS who are eligible for benefits to access them in an expedited fashion. Components of the SOAR model include: eligibility screening, application assistance, appeals process advocacy, collection of medical and other documentation, and coordination of medical assessment necessary to apply for benefits to individuals evaluated to be potentially eligible for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI).

SOAR utilizes a proven program model to assist PLWHA in accessing federal benefits and services to which they are entitled. SOAR is a tested, evidence based program that can expect a 70% success rate in gaining benefits for eligible individuals with a minimum annual cash benefit amount of \$7,476 per person.

Further information on SOAR can be found at the following website: <http://www.prainc.com/soar/>

In the Portland EMSA there are an estimated 3,923 PLWHA as of the end of 2008. According to area AIDS Service Organizations (ASO's) it is estimated that at least 80 to 100 PLWHA in the Portland EMSA could benefit from receiving assistance in applying for benefits. Approximately 53% of PLWHA live with some form of mental illness, and 27% suffer from a severe chronic mental illness. Additionally, an estimated 25% of PLWHA have dual diagnoses with mental illness and substance

abuse. As a result, many of these individuals are unable to navigate the process for applying for SSI/SSDI benefits. Furthermore, at first glance, many PLWHA do not appear to be disabled, thus having the ability to construct a clear and convincing benefits application is necessary. The lack of benefits and income contributes to homelessness.

PHB is seeking an agency with the capacity to work collaboratively with AIDS housing and medical case management providers in the EMSA. It is critical to include key stakeholders, such as these and other HIV/AIDS organizations, in the planning and implementation of the program.

Successful provision of a benefit assistance program will require:

1. the ability to outreach, engage, and maintain relationships with clients who may be homeless or mentally ill, and
2. an understanding of the disease processes and effects of PLWHA
3. legal and technical expertise around the disability determination process

GOALS FOR THIS RFP

- Increase the number of PLWHA who receive social security disability benefits
- Decrease the length of application time for PLWHA to receive benefits
- Increase the number of PLWHA with Medicaid
- Serve all PLWH/A that need assistance with the benefits application in the EMSA
- Use HOPWA funds to leverage additional resources for PLWHA

TARGET POPULATION SERVED

This program will serve People Living with HIV/AIDS in the seven county EMSA that earn 80% median family income (MFI) or less which is \$44,800 for a household of two (2).

TIMELINE

RFP Released – Monday, April 19, 2010

Proposals Due – Monday, May 3, 2010

Contractor Selected and Announced – Tuesday, June 1, 2010

There will be no pre-proposal conference for this solicitation.

Scope of Services and Performance Outcomes

SCOPE OF SERVICES

This program will fund benefits recovery services including:

Outreach - Work with local Social Security office to expedite approval process for this group and improve application quality. Develop relationships with local agencies, healthcare and treatment providers and legal services providers as needed to assist with application and appeals process. Attend the HIV Case Management Network.

Application Assistance – Preparation, with participants, of SSI/SSDI applications and follow up on status as appropriate. This will include accompanying participants to appointments and meetings as necessary and any collateral follow up communications necessary to expedite benefits applications.

Medical/Treatment Records Collection – Investigate treatment histories with program participants including past hospital and clinic visits to obtain an accurate written history of participants’ medical disabilities.

Legal Representation – Referrals to attorneys or direct representation and additional medical evaluation sufficient to help participants successfully navigate the appeals process in the event of initial denials.

Partnership – Participate in monthly SOAR calls with HOPWA technical assistance providers, Building Changes. Build relationship with Policy Research Associates (PRA), the organization that developed the SOAR curriculum for PLWHA, to assure meeting the needs of PLWHA.

PERFORMANCE OUTCOMES AND MEASURES

Data Collection – PHB requires vendors to use the web-based data collection system, Homeless Management Information System (HMIS), to report outcomes and measures, for which training will be provided. Additionally, HOPWA end of year reports that capture client demographics are required.

Measurements may include, but are not limited to:

- Target number of individuals served by SOAR
- Number of applications/appeals completed
- Time to complete application process
- Percentage of participants that secure benefits through assistance from the program

Application Process

PROPOSAL QUESTIONS

Each of the following questions has a maximum of 20 points possible, for a maximum total score of 100 points.

1. Please describe your agency’s experience in engaging homeless or unstably housed persons with mental illness, addictions, and disabilities. Include information regarding targeted outreach, and engagement model, experience in community settings, and methods for addressing resistance or lack of follow-through.
2. Please describe your agency’s experience helping individuals apply for Social Security benefits, collecting appropriate documentation, navigating the Disability Determination system, and representing individuals at hearings and appeals.

3. Describe how your agency will gain access to/become familiar with the HIV community and how your agency will work collaboratively with HIV/AIDS service and care providers. Describe your group's sensitivity in providing services to PLWHA and methods that will be used to protect client confidentiality.
4. List the goals and measurable outcomes your agency will achieve with these funds, including, number of people assisted, number of benefits cases secured, etc.
5. Please describe specifically how HOPWA funds will be used. Using the attached budget form, identify any matching funds, expenses, and proposed staffing plan with individual job positions and their salary ranges. Describe your plan for using the funds available for medical evaluation, assessment, or treatment that will prove disability in application or appeals processes. Describe any non-medical or legal services you plan to purchase using these funds in order to increase rates of approval for benefits for individuals served.

EVALUATION PROCESS

An evaluation team will be assembled to review applicants and will consist of members from PHB, Multnomah County, Partnership Project, Cascade AIDS Project, and Clark County Public Health. Each evaluator will independently assign a draft score to each proposal based on the responses to the below questions. Then the evaluators will meet at a Proposal Evaluation Session and share their key findings from each proposal. After sharing their findings, each evaluator will be given an independent opportunity to revise their draft scores and finalize them. The final scoring for each applicant will then be summed and the applicant with the highest score will be selected as the contractor.

The award will be made to the Proposer who meets all minimum requirements and has the highest scoring proposal, based on written responses, as described in this solicitation.

PHB strongly encourages the participation of Minority-Owned, Women-Owned, and Emerging Small Businesses and Organizations in providing these services.

Procurement Procedure

PHB reserves the right to request clarification of any item in a Proposer's proposal or to request additional information prior to or during the evaluation process to clarify a particular proposal. All requests for clarification and responses will be made in writing and will be provided to each evaluator.

JOINT PROPOSALS

PHB will consider a sole provider submitting a proposal as a Lead Agency providing some services through subcontracted providers. Any Proposer seeking to be a Lead Agency should explain what services will be provided by other agencies and provide a copy of the contract that the Lead Agency intends to use with its subcontracted provider. To the extent that a Lead Agency wins the award, PHB will contract only with the lead agency and will hold the lead agency responsible for providing all services, including those that are subcontracted to other agencies.

CONTRACT NEGOTIATION

PHB may elect to negotiate general contract terms and conditions, services, implementation schedules, and such other terms as the bureau determines are in its best interest. If negotiations fail to result in a contract, PHB reserves the right to terminate the negotiations and initiate contract negotiations with the next highest scoring responsive and responsible Proposer. Services will be contracted and paid on a cost reimbursement basis.

CONTRACT FUNDING

Housing Opportunities for Persons with AIDS (HOPWA), a Housing and Urban Development (HUD) entitlement will be used to fund this program. There is a maximum of \$140,000 available over the two year period to be contracted on an annual basis. This is one-time only funding. Funding is secured from July 1, 2010 through June 30, 2012. Services will be paid on a cost reimbursement basis.

MINIMUM REQUIREMENTS

At the time of contracting, proposers must meet the following minimum requirements.

- The awarded vendor is required to use PHB's Homeless Management Information System (HMIS), Service Point to build and maintain data, and use as a management tool for performance measurements. Service Point is accessed through a City web site, and training will be provided to the awarded vendor at no cost.
- If the vendor elects to drive their clients as part of the provided services of this program, then Commercial Automobile Liability insurance is required by the vendor.

PROPOSAL SUBMISSION

Proposers must submit one original and four complete copies of the proposal to: Portland Housing Bureau, 4221 SW Sixth Ave., Suite 500, Portland, OR 97204, **no later than 4:00 pm Monday, May 3, 2010**. Late proposals will not be considered.

Proposals shall be submitted in a sealed envelope appropriately marked with the RFP Title, the name of the Proposer, and the program name.

All requests for clarification regarding technical information, procedures, contract requirements or any other matter regarding this solicitation should be submitted **in writing** to the Solicitation Coordinator, Dawn Martin.

**SSI/SSDI Outreach, Access, and Recovery
Proposed Budget**

Budget Category	Program Budget	PHB Request	Match?
Personnel:			
Salaries			
Taxes and Benefits			
SUB-TOTAL PERSONNEL			
Operating Expenses:			
SUB-TOTAL OPERATING			
Materials:			
SUB-TOTAL MATERIALS			
Administrative Overhead (7%)			
TOTAL BUDGET	\$70,000		