



Allegany County Department of Human Services

RFP Response Form

RFP for Occupational Therapy (CAPS/OT) Assessments and Home Modifications for Older Adults

PROPOSER INFORMATION

Proposer Name: Omicelo Construction Group LLC - DBA Havenside Construction Group LLC

Authorized Representative Name & Title: Adrienne Walnoha Director of Community Health Initiatives and Compliance

Address: 1435 Bedford Avenue, Rm 303 Pittsburgh PA 15219

Telephone: [REDACTED]

Email: [REDACTED]

Website: <https://havenside.com>

Legal Status: For-Profit Nonprofit Sole Proprietor/Individual Partnership

Women Owned: Yes No

Minority Owned: Yes No

If yes, select the ethnicity:

- | | |
|--|--|
| <input type="checkbox"/> American Indian or Alaska Native | <input checked="" type="checkbox"/> Black or of African decent |
| <input type="checkbox"/> Hispanic or Latino/a | <input type="checkbox"/> Native Hawaiian/Pacific Islander |
| <input type="checkbox"/> Western Asian/Middle Eastern | <input type="checkbox"/> East Asian/Far Eastern |
| <input type="checkbox"/> South Asian/Indian (Subcontinent) | <input type="checkbox"/> Southeast Asian |
| <input type="checkbox"/> Other Asian | <input type="checkbox"/> Multi-racial |

Self-Describe: [Click here to enter text.](#)

Faith Based: Yes No

Partners included in this Proposal: Although partnership and collaboration are key to our work, there are not external partners included in this specific proposal

RFP for Occupational Therapy Assessments and Home Modifications for Older Adult Residents

How did you hear about this RFP? *Please be specific.* DHS staff and Colleagues across the Aging network

PROPOSAL INFORMATION

Which service are you proposing to provide? *(please check all that apply):*

- Occupational Therapy Assessments
- Home Modifications

Total dollar amount requested: 1,008,817 over three years

Proposal summary *(please use only one sentence):*

Omicelo Construction Group LLC DBA Havenside Construction Group has been using a partnered occupational therapy and construction model of assessment and home modification project installation since 2020 (with over 6000 projects completed) and believe our sophisticated model of determining medical necessity, constructability, project management and person-centered in-home solutions will assist DHS in achieving higher percentages of older adults aging in place safely and with enhanced independence.

REQUIRED CONTACTS

	Name	Phone	Email
Chief Executive Officer	Joshua Pollard	[REDACTED]	[REDACTED]
Contract Processing Contact	Adrienne Walnoha	[REDACTED]	[REDACTED]
Chief Information Officer	Paul Mosey	[REDACTED]	[REDACTED]
Chief Financial Officer	Jeffrey Wilde	[REDACTED]	[REDACTED]
MPER Contact*	Paul Mosey	[REDACTED]	[REDACTED]

* [MPER](#) is DHS's provider and contract management system. Please list an administrative contact to update and manage this system for your agency.

BOARD INFORMATION

* For the Board Chairperson, you must list an address, phone and email address different than the organization.

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Board Chairperson Name & Title: NA, the company does not have a board but a group of managing partners. Joshua Pollard-managing partner and CEO, Kathy Feeney-managing partner and COO and Jeffrey Wilde-managing partner and CFO.

Board Chairperson Address: CEO Address: [REDACTED]

Board Chairperson Telephone: [REDACTED]

Board Chairperson Email: Havenside partners included in this Proposal:
[REDACTED]

How did you hear about this RFP? *Please be specific.* Directly from DHS and from colleagues in the Aging sector

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization.

Please do not use employees of the Allegheny County Department of Human Services as references.

Melva Fair: Community Living and Support Services
[REDACTED]

Michael Yonas, DrPH: Pittsburgh Foundation
[REDACTED]

CERTIFICATION

Please check the following before submitting your Proposal, as applicable:

I have read the standard County terms and conditions for County contracts and the requirements for DHS Cyber Security, EEOC/Non-Discrimination, HIPAA and Pennsylvania's Right-to-Know Law.

By submitting this Proposal, I certify and represent to the County that all submitted materials are true and accurate, and that I have not offered, conferred or agreed to confer any pecuniary benefit or another thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or other exercise of discretion concerning this RFP.

Choose one:

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My Proposal contains information that is either a trade secret or confidential proprietary information and I have included a written statement signed by an authorized representative identifying those portions or parts of my Proposal and providing contact information.

OR

My Proposal does not contain information that is either a trade secret or confidential proprietary information.

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ATTACHMENTS

Please submit the following attachments with your Response Form.

- Board-certifications, licensures, and insurances, if applicable
- Resume of Occupational Therapy professional and assistant, if applicable
- Partner commitment letters, if applicable
- MWDBE and VOSB documents (*see Sections 6.1 and 6.2 of the RFP for more details*)
- W-9

REQUIREMENTS

Please respond to the following. **All Proposers must complete the Organizational Experience, Staffing and Budget Sections.** The total score from these sections will be added to the score for each service proposed. The maximum score a Proposal can receive for each service is:

- Occupational Therapy (CAPS) Assessments = 100 points possible
- Home Modifications = 100 points possible

Only complete the sections for the service(s) you wish to provide. A service not included in your Proposal may be left blank. Please stay within the page limit listed at the top of each section.

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All Proposers must complete these sections. Your response to this section must not exceed 7 pages.

Organizational Experience (40 points)

1. Describe your organizational experience providing the proposed service(s) for older adult residents. (10 points)

In 2018, Havenside was approached by the largest MCO in the state of Pennsylvania to create an integrated model for home modifications across 14 counties in Southwestern PA. The MCO found that the volume of individuals utilizing the modification benefits under Community Health Choices demanded a consistent partner to manage the construction side of home modification projects. The company was approached due to its reputation for project management and professional services and in-house construction performance team. This model was loosely based on the CAPABLE protocol and included occupational therapists or Certified Aging in Place Specialists (CAPS) and construction specialists doing partnered assessments of the person in the environment and the constructability of modifications that would promote independence and safety. The CAPS/OT and construction specialists work together to define the scope of work and make recommendations to the project funder. Havenside has trained its internal construction staff through the USC Home Modification Certificate program, the NAHB Aging in Place Certification program and the Certified Environmental Accessibility Certification program to ensure their construction evaluations and installations are deeply informed by aging in place, disease progression, caregiver engagement and usability. Havenside has completed 6000 projects for individuals and families across the ability spectrum and life cycle. The company has built a sophisticated project management process and proprietary technology system to manage projects from beginning to end including the following: accepting referrals; scheduling and completing assessment visits; communicating with and updating participants; moving projects through each stage required by individual funders and regulatory bodies; preparing detailed scopes of work and project proposals; managing forms and verification documents; communicating with subcontractors; ordering and tracking equipment; scheduling and performing installations; educating participants and caregivers on the use and maintenance of their modification; creating final packets of all required program documents and invoicing; conducting quality assurance visits and managing any punchlist items; and creating and submitting final packets to funders and regulatory bodies. All modification projects are warrantied and Havenside provides complete packets with each project outlining what was installed along with manufacturer information. This packet contains all of the company's contact information to ensure participants retain their connection with us. At each participant's quality

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assurance visit, they also complete a satisfaction survey. Any issues identified at that time, move into a resolution process. This includes outreach to the participant, an investigation of their concern and a resolution plan. Havenside vets all products used in its home modification projects. These projects are reviewed for quality, durability and pricing. In order to ensure quality products are used widely, the company identifies, orders and inspects the materials used by its internal construction team and any additional subcontractors involved in modification projects. The company has built pricebooks for modification projects using equipment brands and types vetted by Havenside and informed by partnered work with specialty subcontractors across the state of PA. By managing the product lists and procurement, the company has created a higher volume of product being ordered and achieved lower costs with volume-based manufacturer discounts. Finally, as the company and the CAPS/OT perform quality assurance visits on every project, participants are assured their installation meets their needs and they are well prepared to use and maintain their modification. In addition to home modifications, the company also manages equipment repairs and annual service visits.

2. Describe your organizational experience collaborating with older adults and their natural and professional supports, if applicable. (10 points)

The Havenside teams work with natural and professional supports daily. Each of our projects include a service coordinator, a medical evaluator (CAPS/OT, PCP, Nurse), the participant, their caregivers and their families. Our collaboration starts with the referral. First contacts are made between the Havenside team and the medical assessor or directly with the family. There are shared calendars between the organizations to set and modify assessment dates. Installation recommendations are completed with the participant and whomever they wish to have engaged in the assessment, the medical professional and the construction specialist. That scope is pulled forward with all of the participating partners along with service coordinators and project funders. The Havenside team calls participants for follow ups when there is movement in their project, to schedule visits and answer any questions the household may have. There is a dedicated phone line for any inquiries or concerns about modification projects. In addition, families that may be struggling with complicated service needs or unique assessment dynamics can engage with the MSWLSW NAHB CAPS staff to assist with their in-home visits or to discuss more sensitive issues. As the company has anywhere from 100-300 projects in progress at any time and is completing at least 30 in-home assessments per week, there are constant interactions with participants and families. The company uploads project updates in our shared data systems for the CAPS/OTs and SCs to view daily. Project referrals come in every day through Community Health Choices, the Consolidated Waiver, the Community Living Waiver and the Participant/Family Directed Services Waiver. The company also receives direct outreach from individuals and families who met

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us at community events (Age Friendly, Senior Centers, Public Libraries, Community Festivals), heard about us from a previous client, been referred by an ATP, Service Coordinator or PCP who worked with Havenside previously, website searches and individuals who observe a Havenside installation in their community. Havenside is regularly presenting on mobility and safety in the community. Any group with interest in a presentation can call the organization for a virtual or on-site presentation at no cost. To date, presentations have taken place at public libraries, community centers and resource fairs. These events are either focused on the needs of older adults or individuals aging with their disabling condition. Each day, new requests for service visits and repairs are also received. Typically, Havenside is working with participants, service coordinators and caregivers to understand the emergent issues and ensure there is a timely resolution to the need. With a minimum of six calls daily on these issues, the company is also receiving insight on how modifications are used, challenges with modifications over the lifespan and additional needs users may have in aging with their modification. This information allows us to enhance our current approach and build new mechanisms in the process to support our clients.

- 3. Describe your organizational experience and approach to collaborating with external providers, including governmental agencies. (10 points)**

99% of Havenside's projects involve a third-party payor and at least two service partners. Of those, governmental entities represent the majority of service and funding partners. From large MCOs to small city-wide programs, Havenside strives to create positive and enduring partnerships. The individuals and families we serve have complicated needs. Understanding their environment, the way they engage in their home environments and their goals, gives the company the comprehensive picture needed in order to ensure a modification has the greatest and most positive impact. Each individual and family have their personal expectations. Each partner and funder also has unique expectations. When approaching any new partnership, Havenside prioritizes deep conversations on expectations, protocols, information sharing, timelines, service models, technologies used and outcome measurement. The Director of Community Health Initiatives and Compliance reviews all service and funding regulations, programmatic guidance, record keeping standards, outcome expectations, confidentiality protocols, workflows, policies and procedures and invoicing processes. After this review, a process map is created, technology solutions are built out, staff training is developed and implemented, communication systems are designed and relationship point people are established for ongoing dialogue, questions and concerns. Havenside prioritizes group meetings to create new programs/services and to manage how those programs operate and evolve over time. That evolution takes into account the customer experience, partner operations, comprehensive data collection and sharing, emerging best practice and changing service and funding landscapes. Using our proprietary data and project management systems, we have created portal access for key partners.

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This allows real-time system wide communication to take place. For relationships that do not lend to this type of system, the company provides detailed organizational contact charts. As Havenside has specialized staff at each project stage, partners can go directly to a staff member who will have all of the information needed to respond to their question or concern (referral, project status, timeline for installation, required program documents). Finally, Havenside is actively engaged with partners across the service system. Team members participate in local advisory boards (Wesley Family ISAC), attend communities of practice (Age Friendly/DHS), engage in professional networks (SWPPA), find cross training opportunities with synergist projects (Pitt-Healthy Home Lab), host interns (Pitt CAPS/OT Capstone), attend and sponsor community events and engage in the larger affordable, accessible housing conversation (LHCAPS/OT, HOF). No company can meet the local needs alone. Havenside sees partnership and engagement as a part of everything the company does.

4. Describe your organizational experience and approach to maintaining compliance with all local, state and federal regulations, including licensures, certifications, insurances and bonds. If you currently do not meet one or more of these requirements, describe your plan to apply for and obtain the required documentation; indicate what assistance you will require from DHS, if any. (5 points)

Havenside has had a dedicated staff member charged with this work since the company's inception. The Director of Community Health Initiatives and Compliance (DCHIC) reviews all service and funding regulations, programmatic guidance, record keeping standards, outcome expectations, confidentiality protocols, workflows, policies and procedures and invoicing processes. After this review, a process map is created, technology solutions are built out, staff training is developed and implemented, communication systems are designed, and relationship point people are established for ongoing dialogue, questions and concerns. Havenside has a comprehensive compliance program which includes: the compliance committee which meets monthly; a compliance manual; an annual compliance plan; an ever evolving new hire and annual compliance training; and a sophisticated compliance log which includes licensing requirements and expirations; application timelines; key compliance documents; and the Compliance Corner which highlights key compliance topics each month with the staff.

The DCHIC develops a relationship with each contract compliance lead. Compliance is nCAPS/OT something to be considered when there is an issue or problem. Compliance is part of the company's DNA. There is regular communication with these leads to ensure the company's compliance program is complete, robust and evolving with new expectations. The DCHIC has extensive experience in the realm of compliance. As the previous executive of a large human services organization, she provided oversight for 10M of funding from DHS local

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and state, Medicaid, HUD and FEMA. She regularly trains on compliance expectations with the Home and Community Based Provider network.

[Click here to enter text.](#)

5. Describe your organizational commitment to serving all individuals regardless of their race, religion, ethnicity, sexual orientation, gender identity and expression (SOGIE), intellectual or physical ability, English language proficiency and/or life experiences. Please include specific approaches used and examples of how they are reflected in your work. (5 points)

Each day, Havenside is working with diverse groups across the life cycle with varying abilities. The companies were founded with the belief that by providing and investing in the right kinds of services and supports, communities on Earth can be transformed into more of a heavenly ideal where inclusion, human flourishing and deep compassion are the norm. The company stresses our commitment to diverse groups through our service offerings and employment. We do this through our policy and protocol manuals (Employee Handbook and Compliance Manuals) but more importantly through our staff training, engagement, mentoring and corporate culture. Each staff member actively participates in multipronged new hire training where these beliefs, values and commitments are stressed and also modeled. These concepts are promoted in our annual all-staff trainings and are a core component of our annual performance appraisals. Additionally, it is important to note that Havenside performs modifications in all types of home environments: single family homes, mobile or modular homes, apartments, tiny homes/micro housing, new construction, commercially graded properties, personally owned, rented, shared or bartered housing options.

Staffing (15 points)

6. Describe your organization's plan to recruit and/or retain qualified individuals, including obtaining the required licensures. (10 points)

Havenside is unique in that the infrastructure and staffing to support this opportunity are already in place. With current staff, Havenside could begin taking referrals for this project immediately. Staff licensures are tracked by the Director of Community Health Initiatives and Compliance and there is a renewal process in place with existing and for any future staff. In order to retain staff, Havenside takes a very different approach. Each position is recruited based on professional skills but also personal values and a commitment to serving diverse groups of individuals with mixed abilities. Our interviewing process includes a review of professional experience and qualifications, behavioral surveying and real-world experiences with the existing team. Choosing a workplace is a transformational

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decision. The company does not want to rush into employment relationships lightly. These components allow us to know our candidates more deeply and ensure values align. The process allows candidates to experience what it “looks” and “feels” like to work for Havenside. We recruit for specific roles. We have individual staff focusing on tasks that align with their skillsets and provide an opportunity to focus and deepen their professional skills. We keep staff by providing enhanced training and promotion opportunities; generous pay and benefits; regular staff engagement and celebratory events; access to robust supervision and direct contact with company owners; flexible work schedules and locations; and a strength-based evaluation/supervision approach.

7. Describe your organization’s plan for onboarding and providing continuous staff training regarding your organization’s service implementation, culture and policies. (5 points)

As noted above, we don’t foresee significant onboarding for this proposal. Havenside’s onboarding and training protocol post hire is as follows:

- 1. The first two weeks of employment are on-site training only.**
- 2. Orientation to the company, safety at the work site, assignment of and training on company technology and compliance training occur week one.**
- 3. Week two includes positional and program training including enrollment and access to all systems used within the role.**
- 4. week three includes engagement with the project team and shadowing**
- 5. Weeks 4-6 include supervised performance of position duties and shadowing of tenured staff. At minimum, weekly time with the direct supervisor is scheduled and maintained. Supervisors are available 7a-7p Monday through Friday for regular hours and adjust for any emergent supervision issues as needed.**
- 6. Weeks 4, 8 and 12 involve a formal evaluation of performance to date, benchmarking of skills and identification of additional training needed.**
- 7. For customer facing staff, observation of customer interactions take place weeks 4-12. Those interactions are related by the observer and if they are satisfactory, staff are released to work independently.**

Administrative staff receive additional training related to the program and contracts as changes emerge or new best practice guidance is available. Leadership training sessions are available to staff in or transitioning to managerial roles. All staff receive compliance training in the first quarter of each calendar year. Construction staff have mini trainings each week on new technologies/products, protocols and safety topics. At any time processes or policies are changing, the company organizes in-person and virtual events to discuss the reasons for the change, the protocol for the change, the implementation impacts of the change and discussion of any questions or concerns about the new strategy. Finally, there are multiple times per year to hear about new organizational items, receive program updates, reinforce organizational values, meet new team members and spend time with the company’s owners.

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Occupational Therapy (CAPS/OT) Assessments (35 points)

Complete this section only if you are proposing to provide this service. If you are not proposing to provide this service, please leave this section blank. Your response to this section must not exceed 4 pages.

8. Describe your organization's approach to successfully completing up to 5 assessments, including visits, per month. (10 points)

At this time, our team schedule includes space for 40-60 assessments (CAPS/OT and construction specialist) per week. There is capacity to add assessments under this proposal immediately. Havenside uses shared calendars and our propriety data system to coordinate referrals and visit scheduling. Our system considers geographic location of assessment to cluster visits in geographical areas. This enhances efficiency in scheduling and performance of the assessment. The full-time scheduler can engage participants for any schedule changes and cancellations. The Havenside data system allows all assessment reports to be uploaded directly. All common forms are available through this system as well. The Havenside administrative team picks up items (follow up calls, gathering forms) that would distract the CAPS/OT from finalizing their reports and recommendations. Our construction assessors and CAPS/OTs have a relationship and they share their knowledge. With so many projects completed together, a more synergistic process has been created and the ability to identify potential barriers from the ability, safety or construction perspectives has been enhanced. Scopes of work are established between the CAPS/OT and construction assessors to ensure the right modifications, repairs and equipment are installed and can have the highest impact. The staff are also well versed in when virtual experiences can add value to an assessment. Team members may virtually loop in another party to ensure comprehensive information is being collected and alternative modification options can be discussed in real time in the identified space.

9. Describe your organization's plan for integrating the HFLD assessment tool into your assessment while ensuring the quality and consistency of services provided. (10 points)

Although Havenside has not been using the HFLD assessment tool, the company has been using an MCO approved home assessment tool that includes a comprehensive physical review, testing tasks for ADLs and ambulation, safety and mobility factors/barriers and modification/DME recommendations. The HFLD assessment tool can be built directly into Havenside's data system. Staff will have full access to the assessment and can complete and upload in a single location. The assessment will then become part of the participant's comprehensive electronic record. All of the HFLD information will then be used by the construction team to finalize the scope of work and associated proposals. The CAPS/OT and construction staff can collaborate in real time and work collectively

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on any scope changes, participant capacity or modification additions. In addition, Havenside works with CAPS/OTs, PCPs and nurses across health systems. The team has extensive experience incorporating various assessment tools into the comprehensive evaluation and scope planning of modification.

10. Describe your plan for successfully incorporating and managing Occupational Therapy Assistant(s). (10 points)

Havenside already works with CAPS/OT, Physician and Service Coordination Assistants. Currently, these communications are managed through phone calls, emails and practice based data systems. These staff members can be added to Havenside's data system for access to the same documentation, information sharing, appointment scheduling and record updates that the CAPS/OT accesses. New users are added to the Havenside system within 24 hours. The activities section of this system outlines all communication, project updates, timelines and appointment schedules. In addition, this system is built with timelines and project management tools to ensure staff are alerted to next steps related to the project and prompts that trigger all required program documentation. The dashboard contains all tasks required to move the project forward by staff role. Project reports are also available based on any field within the system (referral date, project stage, type of project, construction progress, project closure).

11. Describe your approach to addressing additional and unaddressed/incomplete home modifications. (5 points)

Up to 40% of the referrals received by Havenside require more work in the home and more services than can be provided by one program or funding source. The CAPS/OT and construction staff are knowledgeable about additional community resources and provide guidance and support to participants related to accessing them. Resource lists are left at the conclusion of the assessment visit and those visit reports are entered into the Havenside data system. Staff who will need to follow up related to service barriers and/or service barriers are tasked within the system. Staff can also communicate via the data system, emails, virtual/in person meetings and phone to case conference and create action plans. Havenside looks forward to engaging DHS more directly in this process and hopes to deepen the referral sources and relationships that can support individuals and families meet their needs.

Participants in various home modification programs may have changes that occur in their need or their home. All participants receive an information packet during their assessment visit. This packet contains contact information for Havenside and customer relations staff monitor inquiries seven days per week. If the changes are related to their condition, the CAPS/OT will re-assess the need and recommendations. If the changes are related to the home, the construction

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assessors will conduct a phone triage and additional home visits as needed to adjust the project accordingly. Regardless of what staff are engaged in the initial change notice, both CAPS/Occupational Therapy and construction staff revisit and adjust the scope of work accordingly. There is a change order process to alert program monitors and funders of any scope changes.

Participants may also change their mind or determine a new housing option is needed. Havenside has a project declination process for gathering and storing declination information. The declination captures details of the change and contains the participant's signature to verify their choice. Any materials that can be returned are returned. Any items that cannot be returned but can be repurposed are removed from the scope of work, adjusted in final project documentation and returned to Havenside inventory. Any custom materials that cannot be returned or repurposed are included in the final project documentation and invoice with detailed accounts of why they were not returned or repurposed.

Home Modifications (35 points)

Complete this section only if you are proposing to provide this service. If you are not proposing to provide this service, please leave this section blank. Your response to this section must not exceed 4 pages.

12. Describe your organizational experience completing home modifications in a timely manner. (5 points)

Havenside has been performing and project managing the whole array of home modifications since 2020. This includes adjustments to the home's structure, renovation and remodels, repairs, service visits, upgrading systems that support accessibility modifications and equipment installation. For this period, projects have been coordinated with medical professionals. This has been primarily CAPS/OTs but has also included PCPs, Specialists, ATPs and nurses. The company has completed 6000 projects with 100-300 projects being active at any time. The team conducts a minimum of 30 assessment visits per week. Using specialized staff and propriety technology for scheduling, assessment, project management, equipment purchasing, warehouse management, construction installation, quality assurance and project finalization, the team understands and performs every stage of the project. Timelines are established within the data system that trigger project movement and alert team members of any outstanding items or delayed projects. With robust administrative infrastructure, projects are moved forward and double checked to ensure all project elements are complete and timely. Project milestones must close before next steps can take place. These milestones are monitored closely by the individuals who own each project staff. They are also then reviewed by supervisors overseeing unique project stages. Fiscal, compliance and oversight staff are also reviewing processes, prCAPS/OTocols, timelines and sophisticated monthly reports to ensure all projects

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are completed. Any issues or anomalies are the subject of case conferencing and quality improvement plans.

13. Describe your organization's approach to providing quality and consistent home modification services. (10 points)

A well established and tested process is used for each modification. Each project follows linear, comprehensive steps from referral to completion and case closure. The data system reflects each element of the program and guides work within it. All Havenside staff are trained in project stages and all associated policy, procedure and protocol. Annually and at any time program partners have regulatory or expectation changes, the full protocol is re-evaluated for compliance, adherence to program expectations and to ensure appropriate infrastructure is in place to meet the changes.

As mentioned previously, Havenside has a robust compliance program with many levels of training, oversight, action planning and policy development. The Chief Operating Officer reviews every case before its closure to identify any issues, procedural problems, process deviation or unexpected project barriers. As issues are identified, case conferencing and quality improvement strategies are identified and implemented. Key staff are assigned to each project stage. These staff are responsible for auditing cases, evaluating staff performance, policy and procedure updates and quality assurance reviews. Havenside performs a quality assurance visit on each project completed. This ensures the scope of work was done to specifications, the work is professionally installed, the service area was left clean and safe, the participant and caregivers can use and maintain the equipment and each participant is satisfied with the work. These quality assurance reports are reviewed by management to identify trends, trainings that could improve the process and quality of installation, product performance, staff professionalism and the responsiveness of customer service. Any issues identified are reviewed across company staff (HR, Compliance, Fiscal, Construction, Project Management) to inform current and future practice. In addition, each installer receives a scorecard for each project they complete. That scorecard is used to reinforce quality performance, address any barriers to exemplary installation, create training protocols and provide incentives.

14. Describe your organization's approach to successfully and consistently completing up to 5 projects per month. (10 points)

The current organizational capacity well exceeds the completion of 5 projects per month. The company could execute up to six times this level per week. Each referral opens a new case in the proprietary data system. The administrative team includes: a full-time scheduler who manages scheduling and cancellations; a project coordinator who is charged with collecting program information, conducting outreach to participants and fielding follow up questions; in addition,

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these staff and the project managers ensure the CAPS/OT and construction assessors have time to complete all necessary reporting by supporting their administrative needs.

Project stages are affiliated with timelines within the data system and each program stage has individuals assigned to its management. Each staff member has a dashboard outlining their tasks and triggers to ensure all required documentation is collected during each project stage. Projects cannot move forward until each stage element is complete. Stage supervisors weekly monitor timelines, case assignments and outstanding items to ensure projects are moving forward on schedule. Any deviations from the schedule are sent for case conferencing to identify the issues causing delays. All participants and program partners are provided with updates on barriers and delays to ensure the service team is supporting the participant in the best possible way and any project changes required are in line with the participant need and the program contract.

In addition, the customer relations staff are regularly engaged with the participant, their family, their caregivers and care team to ensure they are up to date on all project details and are being served appropriately during the project duration.

Finally, the Director of Community Health Initiatives and Compliance does spot audits on any projects that may fall out of the typical project protocol and timelines. These audits are completed prior to expected project completion dates. They include a review of the project from referral to the present. Any staff involved in the project are convened to identify barriers to completion. These barriers are reviewed, resolved and become part of a prevention plan. The prevention plan outlines all steps required to ensure future projects do not experience the same issues.

15. Describe your organization's plan for resolving additional and unaddressed/incomplete home modifications identified by the Occupational Therapy professional(s). (10 points)

As Havenside is applying for both Occupational Therapy and Home Modification activities, this question's answer mirrors the prior section.

Up to 40% of the referrals received by Havenside require more work in the home and more services than can be provided by one program or funding source. The CAPS/OT and construction staff are knowledgeable about additional community resources and provide guidance and support to participants related to accessing them. Resource lists are left at the conclusion of the assessment visit and those visit reports are entered into the Havenside data system. Staff who will need to follow up related to service barriers and/or service barriers are tasked within the system. Staff can also communicate via the data system, emails, virtual/in person meetings and phone to case conference and create action plans. Havenside looks forward to engaging DHS

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Participants may also change their mind or determine a new housing option is needed. Havenside has a project declination process for gathering and storing declination information. The declination captures details of the change and contains the participant's signature to verify their choice. Any materials that can be returned are returned. Any items that cannot be returned but can be repurposed are removed from the scope of work, adjusted in final project documentation and returned to Havenside inventory. Any custom materials that cannot be returned or repurposed are included in the final project documentation and invoice with detailed accounts of why they were not returned or repurposed.

Budget and Budget Narrative (10 points, not included in page count)

16. Attach detailed start-up and annualized budgets that clearly support the Program and the implementation plan. (5 points)
17. Provide a budget narrative that reflects a realistic estimate of the costs associated with implementing the Program. (5 points)

Item 16: Omicelo Construction Group DBA Havenside Construction Group Proposed Budget

***CAPS/OT Costs captured in blue **Home Modification costs captured in yellow**

Activity	Description	Year One Total	Year Two Total	Year Three Total
CAPS/OT Staff Salary	Salary estimated for 60 clients and 6 hours/client	26,460*	27,389	27,936
CAPS/OT Benefits	Full benefits complement/hr	8,820*	8,996	9,176
Construction Staff Salary including Tradespeople and Equipment Management	\$40/hour including equipment transport to site, installation, clean up, participant review of installation including its safe use and maintenance, documentation (5 hours per project)	12,000**	12,000	12,000
Construction Staff Benefits	Full Benefits Complement/hour	3,600**	3,600	3,600
Modification/Construction Equipment: 60 projects with variable scopes of work	Per project equipment and supply cost	284,400	284,400	284,440
TOTAL		335,280	336,385	337,152
				1,008,817

Item 17: Budget Narrative

CAPS/OT STAFF SALARY and BENEFITS

CAPS and OT salary and benefits are calculated using hourly wages for the following:

1. Conducting the assessments ((Initial inspection and assessment using HFLD Assessment tool) and follow up visits Home Modification Validation and Follow Up Inspection/Assessment

2. Completing the HFLD assessment and follow up reports
3. Discussing project scopes with the construction provider in circumstances where all the items required cannot be provided or there is a complicating factor in home or with the participant
 - a. Over the last six years, Havenside has observed even simple, straightforward projects experiencing complications where the team needs to revisit the scope of work
 - b. Scope of work changes should engage CAPS/OT staff aligning with construction team members to ensure any changes precipitated by changes in the home, changes with the participant or changes in equipment available can be resolved appropriately
4. The hourly wage is \$73.50
5. The company offers a full benefits package: competitive salaries for well experienced workers, PTO, 401k with match, healthcare, dental care, vision care, short and long term disability coverage, life insurance and advanced training. Costs are kept low through the company's PEO services.

CONSTRUCTION STAFF AND BENEFITS

Construction staff salary and benefits are calculated using hourly wages for the following:

1. Finalizing constructable/installable scope of work with CAPS/OT staff
2. Completing a project proposal with all equipment specifications and costs
3. Ordering/inspecting equipment
4. Installing modification/equipment
5. Participant and caregiver training
6. Quality Assurance on construction/installation
7. The hourly wage is \$40
8. The company offers a full benefits package: competitive salaries for well experienced workers, PTO, 401k with match, healthcare, dental care, vision care, short and long term disability coverage, life insurance and advanced training. Costs are kept low through the company's PEO services.

MODIFICATION/CONSTRUCTION EQUIPMENT

Projects will include the following:

1. Basic construction supplies (for example-nails, paint, fasteners, joint compound)
2. Durable Medical Equipment (temporary ramps, shower benches)
3. Home Accessibility Durable Medical Equipment (for example-grab bars, bidets, platform lifts, stairlifts, telecabs)
4. Specialty equipment (for example, harnesses for lifts, levered handles, adjustable showerheads, toiletvators)
5. Safety Products (for example-high volume or lighted alert systems, enhanced/motion sensor lighting, paint for enhanced delineation of hallways/walkways, comfort height toilet, gripper adhesives/paints)
6. Havenside has established a local price book to assist with pricing of all safety and mobility projects
7. Havenside does ordering for its own projects and all of its tradesmen. This allows for bulk pricing discounts.
8. Havenside has tested multiple manufacturers for safety, durability and cost-effectiveness. These vendors are used to ensure the best products are used for each modification.

Havenside is a full-service modification and adaptation provider. Serving 60 households at a cap of \$5000 per household will result in more minimal modifications per recipient. Items like custom-curved stairlifts will not be possible under these limits but the company will focus on maximizing the resources available. If any individual projects do not use the full \$5000 or if DHS would like to award Havenside the \$11,183 remaining in the CAPS/OT line item maximum, the company would be happy to complete more than 60 projects over the award term.