



REQUEST FOR PROPOSAL

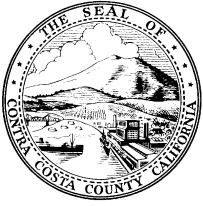
CASE MANAGEMENT
OUTREACH &
TRANSPORTATION

RFP # 1191

ISSUE DATE: January 19, 2023

PROPOSAL DUE DATE: February 17, 2023, no later than 5:00 PM PST

**CONTRA COSTA COUNTY
EMPLOYMENT & HUMAN SERVICES DEPARTMENT
AGING & ADULT SERVICES (AAS) BUREAU
40 DOUGLAS DRIVE
MARTINEZ, CALIFORNIA 94553**



**EMPLOYMENT & HUMAN SERVICES DEPARTMENT (EHSD)
Aging and Adult Services (AAS) Bureau
Case Management, Outreach, and Transportation**

REQUEST FOR PROPOSAL (RFP) 1191

The Contra Costa County Employment & Human Services Department, Aging and Adult Services (AAS) Bureau, is pleased to announce the availability of funds through the County's Measure X and Adult Protective Services (APS) American Rescue Plan Act (ARPA) to serve Contra Costa County residents aged 60 years and above and dependent adults 18 and older. The AAS welcomes applications from public or nonprofit organizations that have demonstrable capacity to successfully deliver the services sought in this RFP.

This RFP is the process by which the County will solicit proposals for the purpose of entering into a contract with selected providers for the period from July 1, 2023 through June 30, 2024, with the possibility of renewal and/or extension based on satisfactory performance, available funding, and prioritization of services in the implementation of the Master Plan for Aging in Contra Costa County.

Please read this entire packet carefully.
**Interested parties are invited to attend the
Recommended Virtual Bidders' Conference scheduled for
Date: January 25, 2023
Time: 10:00 a.m. to 12:00 p.m. Noon**

A mandatory Letter of Intent to submit a proposal is due by 5:00 p.m. PST on **February 1, 2023** via email to contractbid@ehsd.cccounty.us

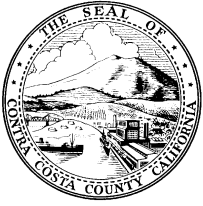
Attendance at the Bidders' Conference is not required for a proposal to be considered. Bidders' Conference attendance is virtual. **To attend Bidders' Conference via RFP 1191**, please register at the following website:
<https://attendee.gotowebinar.com/register/3252062253960374619>
After registering, you will receive a confirmation email with instructions about how to join the webinar.

Webinar ID
366-623-787

**Final proposal submission is due by
5:00 p.m. on February 17, 2023**

Questions about RFP 1191 or the County's procurement process must be submitted in writing to contractbid@ehsd.cccounty.us. Questions will be accepted through February 3, 2023. All comments and inquiries received will be posted publicly, along with the responses, on February 10, 2023 at: www.ehsd.org/rfps.

Thank you in advance for your effort in preparing your response.



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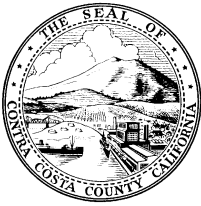
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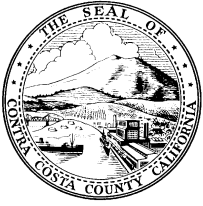
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SECTION 1: LEGAL NOTICE

REQUEST FOR PROPOSAL 1191

OUTREACH, TRANSPORTATION, AND CASE MANAGEMENT

The Contra Costa County Employment & Human Services Department, Aging and Adult Services (AAS) Bureau announces the issuance of **Request for Proposal (RFP) 1191** seeking public agencies, nonprofit organizations, or community-based entities fiscally-sponsored by a nonprofit organization to provide services funded by Contra Costa County's Measure X and Adult Protective Services (APS) - American Rescue Plan Act (ARPA) funds. RFP 1191 calls for agencies interested in and have the capacity to deliver Outreach, Transportation, and Case Management services to older persons aged 60 and above and dependent adults 18 years and over residing in Contra Costa County. Total funding available is **\$789,750** for the period **July 1, 2023 through June 30, 2024**. Funding from Measure X totals \$700,000 and APS-ARPA for \$89,750.

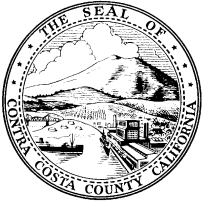
Qualified community agencies are invited to submit a proposal for one or more of the services described above.

A Recommended Virtual Bidders' Conference is scheduled for **January 25, 2023, from 10:00 am to 12:00 p.m. Noon PST**. Participation in the Bidders' Conference is recommended but not required. Registration is required to join the Bidders' Conference.

Submission of proposals in response to RFP 1191 is due on February 17, 2023 by 5:00 p.m. PST, without exception.

For complete RFP details, Bidders' Conference registration instruction, submission requirements, and a copy of the RFP, visit the Employment & Human Services Department website at: <https://ehsd.org/overview/contracting-opportunities/> or by calling (925) 608-4969.

All potential applicants will have equal access to the information associated with this RFP. Submit questions about this RFP to contractbid@ehsd.cccounty.us with "RFP 1191" in the subject line. Questions must be submitted by February 3, 2023. All comments and inquiries received will be posted publicly, along with the responses, on February 10, 2023 at: <https://ehsd.org/overview/contracting-opportunities/>



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SECTION 2: RFP 1191TIMELINE

Event/Location

Date*

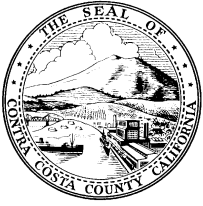
Legal Notice Released and RFP Posted on Website	January 19, 2023
Recommended Bidder's Conference	January 25, 2023 10:00 a.m. – 12:00 p.m.
Mandatory Letter of Intent (LOI) to Submit Proposal Due Date. Submit LOI to contractbid@ehsd.cccounty.us	February 1, 2023 by 5:00 p.m. PST
Question Submittal period Submit questions to: contractbid@ehsd.cccounty.us	Through February 3, 2023
Questions and Answers posting of previously submitted Questions	February 10, 2023
RFP Proposal Response Submission Due Date	February 17, 2023 by 5:00 p.m. PST
EHSD Compliance Review and Evaluation	February 20 - 21, 2023
EHSD Fiscal Review and Evaluation	February 22 – March 8, 2023
AAS Bureau Review and Evaluation	March 9 - 23, 2023
Award Notification	March 24, 2023
Appeal Period (10 business days)	March 24 – April 6, 2023
Contract Negotiation & Processing	April 6 - 30, 2023
Board of Supervisors' Authorization of Contracts over \$200,000	June 13, 2023
Projected Contract(s) Start	July 1, 2023

*All dates are subject to change as deemed in the best interest of EHSD.

Contact (RFP Process only): EHSD Contracts Unit
 Contact Phone: (925) 608-4969
 Contact Email: contractbid@ehsd.cccounty.us
 Bidders Conference Webinar: January 25, 2023
 10:00 am – 12:00 pm Noon

To attend Bidders' Conference via RFP 1191, please register at the following website: <https://attendee.gotowebinar.com/register/3252062253960374619>
 After registering, you will receive a confirmation email with instructions about how to join the webinar.

Webinar ID
 366-623-787



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Please have a copy of the RFP with you when joining the Bidders' Conference.

All attendees will be in listen mode only.

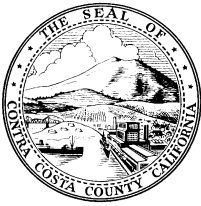
You can register at any time. Upon the registration approval, you can test your system in advance. You will need a sound-enabled PC to hear the discussion. All questions will be entered via the keyboard.

If you have problems logging in, please contact the support page at www.gotowebinar.com.

If you have not used a GoToMeeting or GoToWebinar before, access a 4-1/2 minute YouTube video that can help guide you.

<https://www.youtube.com/watch?v=IQ3Xwwgbd8Y&t=5s>

Remember to use your computer audio for access during the webinar.



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SECTION 3: REQUEST FOR PROPOSALS 1191 GENERAL INFORMATION

3.1 Issuing Agency

Contra Costa County partners with the community to deliver quality services to ensure access to resources that support, protect, and empower individuals and families.

Request for Proposal 1191 is issued by the Contra Costa County Employment & Human Services Department (EHSD), Aging and Adult Services (AAS) Bureau, which oversees the Area Agency on Aging (AAA), Adult Protective Services (APS), General Assistance Program, In-Home Support Services (IHSS), and IHSS Public Authority. The **mission** of AAS is to:

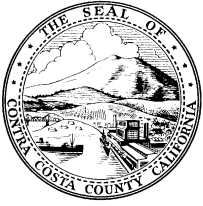
Provide leadership in addressing issues that relate to Older Californians, to develop community based systems of care that provide services which support independence within California's interdependent society, and which protect the quality of life of older adults and persons with functional impairments, and to promote citizen involvement in the planning and delivery of services.

The AAA supports this mission through its role as the primary planner, convener, and funder of programs and services for older persons, adults with disabilities, and family caregivers in Contra Costa County. The AAA facilitates clients' ability to age in the community with dignity and purpose through direct service delivery and contracts with community-based agencies. It is in this capacity that entrusted the AAA to lead the local implementation of California's Master Plan for Aging (MPA) and has the approval of the Board of Supervisors to support this effort with Measure X funding.

3.2 Overview of the Master Plan for Aging and Measure X Support

Governor Newsom's passage of Executive Order N-14-19 in June 2019 catalyzed an unprecedented undertaking prioritizing California's older adults and persons with disabilities. A statewide planning process brought together subject-matter experts, government agencies, policymakers, service providers, and persons with lived experience to create the Master Plan for Aging (MPA). The MPA is a 10-year blueprint to prepare California for the rapid graying of its population and to maintain the state's leadership in addressing aging, disability, and equity issues through five bold goals:

- Housing for all ages and stages
- Health reimagined
- Equity and inclusion, not isolation
- Caregiving that works
- Affording aging



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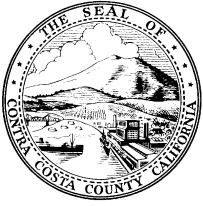
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On June 24, 2021, more than 150 stakeholders representing public, private, nonprofit, and elected office participated in a community stakeholders' forum that identified the following 15 priority areas to fulfill the vision of the MPA locally:

- **Addressing affordability, availability, and accessibility** of housing, supportive services, food and nutrition, transportation, and other resources for older adults, persons with disabilities, and family caregivers.
- **Developing the workforce** by providing equitable living wage for paid caregivers, developing geriatric training modules, and creating certificate programs for professionals.
- **Expanding choices and options** by exploring various housing types, alternative living arrangements, in-home and out-of-home homecare, end-of-life care (including palliative care), and community development/City planning, permitting and building.
- **Reframing attitudes, beliefs, and behaviors** through anti-ageism, anti-ableism, and caregiver awareness, which includes acknowledging the intersectionality of these issues resulting in further marginalization of various groups.
- **Prioritizing at-risk and hidden populations** including low- to very-low income seniors, persons with disabilities, and middle-income individuals who do not qualify for means-tested public programs yet cannot afford to pay out-of-pocket for services.
- **Developing data infrastructure and systems** to cross-share information among providers working with clients and consumers.

Contra Costa is in a unique position to successfully implement the MPA. On November 16, 2021, the Board of Supervisors adopted the Measure X policy and funding allocation expenditure plan, which includes \$1.25 million in the first year and \$2 million annually thereafter to support the local implementation of the MPA and its initiatives. Measure X is a half-cent sales tax approved by Contra Costa County voters in November 2020 to generate revenue for essential services that includes, among others, safety-net programs and protection for vulnerable populations.

Measure X funding will be used to develop the **Contra Costa Local Playbook** (Local Playbook), which includes support for: (1) a planning process to set the groundwork for the local implementation of the MPA; (2) the provision of direct support to community-based organizations to engage in capacity building; and (3) the implementation of priority initiatives to position Contra Costa on a viable and sustainable path forward for older adults and persons with disabilities. The MPA local implementation project supports Measure X's goal of creating a community where all residents feel safe, welcome, and responsive to the emergent needs of its residents.



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3.3 Service Solicitation

The AAS is soliciting proposals from nonprofit organizations, public agencies, and community-based entities fiscally sponsored by a nonprofit agency to deliver the following services:

- Case Management
- Outreach
- Transportation

Services sought under RFP 1191 aim to address the mobility needs of the targeted client population, connect at-risk individuals with high needs to supports, and reach and educate older adults, persons with disabilities, and family caregivers about community resources and service options. Case Management services shall also target vulnerable individuals who have experienced abuse or neglect, including self-neglect, referred by APS social workers, service providers, and community partners.

The AAS specifically seeks providers that can deliver programs that align with the following guiding principles of the MPA: person-centered, equity focused, and data driven. Funding to implement pilot programs or to replicate best practices from other counties/communities in Contra Costa may be sought through this RFP. Contracts secured through this RFP will be managed and monitored by the AAA.

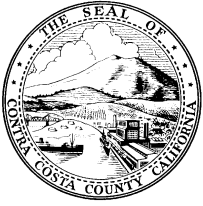
3.4 Qualified Bidders

Eligible Bidders are nonprofit and public agencies, or an entity fiscally sponsored by a nonprofit or public agency, that have adequate controls, personnel, and capability to provide the services sought in this RFP. Bidders must demonstrate they possess the skills, experience, and capacity to deliver the proposed service(s). Collaborative proposals are accepted, but one agency must submit the proposal as the applicant and will act as the fiduciary and contractor with the County.

By submitting an application, and if selected, the Bidder agrees to be bound by all the terms and conditions of the County's standard contract. Proposals submitted by the successful applicant shall become part of the contract service plan, unless negotiated, amended, or modified by the County. Two authorized representatives of the successful applicant shall be required to sign the County standard agreement.

3.5 Ex Parte Communication

The County will enforce the prohibition on *ex-parte* communication during this RFP process. The *ex-parte* communication restricts RFP Bidders from contacting County staff or members of the AAA's Advisory Council on Aging (ACOA), except as specified



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and expressly authorized under the terms of this RFP. During the period from the issuance of this RFP and the award of the contract to a successful applicant(s), contact regarding the specific subject of this RFP between potential or actual applicant(s), County staff, and ACOA members is restricted under the terms of this section. A documented instance of such contact by an actual or potential applicant shall be grounds for disqualification from the process. County staff shall be defined as any County employee, agents, or contractors involved in or connected with this RFP.

3.6 Questions and Comments

Potential Bidders may pose questions about the RFP process or content by submitting questions to the Employment & Human Services Department (EHSD) Contracts and Grants Unit.

Questions about RFP content must be submitted via email to contractbid@ehsd.cccounty.us by the “**Question Submittal Period**” referenced in Section 2, RFP Timeline. Responses to questions will be posted on the EHSD website at <https://ehsd.org/overview/contracting-opportunities/> under this RFP by the Responses to RFP Questions date referenced in Section 2, RFP Timeline.

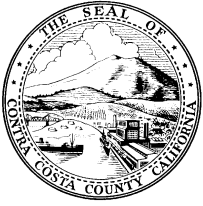
Upon conclusion of the “Question Submittal Period” referenced in Section 2, RFP Timeline, only RFP *process* related questions will be accepted and can be sent via email to contractbid@ehsd.cccounty.us. Emails should include “RFP 1191” in the subject line.

3.7 Right to Cancel or Amend

The EHSD reserves the right to delay, amend, or cancel all or any part of this RFP at any time without prior notice. The EHSD reserves the right to reject any or all proposals, to accept or reject any or all items in the proposal, and to award contracts in whole or in part as is deemed to be in the best interest of the County. This RFP does not commit the EHSD to award a contract or to procure a contract for services. It is in no way an agreement, commitment, obligation, or contract between the EHSD and any Bidder. The EHSD is not responsible for costs incurred by Bidders in preparation of responses to this RFP. The EHSD reserves the right to split the award in any manner deemed most advantageous to the County, as well as to increase or decrease the award amount.

3.8 Restrictions and Disclosures

Any information deemed confidential or proprietary by the Bidder must be clearly marked and identified by the Bidder as such and include an explanation of why such information is exempt from disclosure under applicable law. Such clearly marked and identified confidential or proprietary information will be protected and treated with



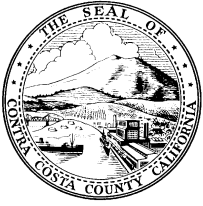
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confidentiality only to the extent permitted by law. Information not protected from disclosure by law will be considered a public record.

Proposals will be received, maintained, and may be disclosed to the public consistent with the California Public Records Act and the Freedom of Information Act. Proposals will be exempt from disclosure until the conclusion of the evaluation and selection process. Bidders should be aware that the County is required by law to make its records available for public inspection and copying, with certain exceptions (see California Public Records Act, California Government Code Section 6250 et seq. and the Freedom of Information Act - 5 U.S.C. Sec. 552).

EHSD will not notify Bidder of requests for release of information or that EHSD released data unless the EHSD receives a request for information previously marked and identified by Bidder as confidential or proprietary. If the EHSD receives a request for release of such previously marked and identified confidential or proprietary information, the EHSD will notify Bidder of such request to allow Bidder to challenge such request consistent with applicable law.



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SECTION 4: CONTRACTOR REQUIREMENTS

4.1 Estimated Funding and Contract Period

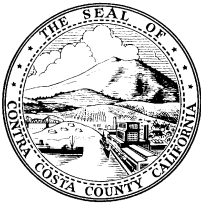
Funds available through RFP 1191 for Case Management, Outreach, and Transportation services funded by Measure X and APS-ARPA for the period July 1, 2023 through June 30, 2024 is approximately **\$789,750**. Contracts funded through Measure X may be renewed for additional one-year periods starting July 1, 2024, contingent upon continued prioritization of these services in Contra Costa's MPA strategies, availability of funds, and contractors' satisfactory performance. Contract amount may vary from year to year depending on these conditions. APS-ARPA funding must be expended by September 30, 2023 and is not renewable due to the expiration of this federal award. Awarded Bidders will be required to enter into a Standard County Contract for the procured service(s).

County will award a standard contract to selected organizations. Total award amount will be billable monthly in arrears.

- Measure X funds are identified as follows:
\$700,000
Federal Award Identification Number (FAIN): N/A (not Federal funds)
Award Period of Performance: 1/1/2023 – 6/30/2024
Assistance Listing Number (AL): N/A (not Federal funds)
Program Title: Measure X, Master Plan on Aging (MPA)
Agency: N/A
Office: N/A
Match Requirement: 0
- Adult Protective Services, American Rescue Plan (APS-ARPA) funds are passed through the California Department of Social Services, and are identified as follows:
\$89,750
Federal Award Identification Number (FAIN): 2101CAAPC6
Award Period of Performance: 1/1/2023 – 9/30/2023
Assistance Listing Number (AL): 93.747
Program Title: Elder Abuse Prevention Interventions Program
Agency: Department of Health and Human Services
Office: Administration for Community Living, Administration on Aging
Match Requirement: 0

4.2 Eligible Populations

Contractors are required to serve one or more of the following eligible clients residing in



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Contra Costa. Contractors must follow eligibility requirements specific to the contracted program(s) and service(s).

- Persons aged 60 years and older.
- Persons with disabilities aged 18 years and older.
- Unpaid family member or care support for a dependent adult aged 18-59.
- Unpaid family member or care support for an older person aged 60 and above.

Eligible clients for **Case Management** also include dependent adults aged 18 to 59 and older person age 60 and above, regardless of income, who are unable to resist abuse or neglect because of their mental or physical vulnerability and are in need of protective services. This includes individuals with incidences of abuse/neglect or self-neglect mitigated by APS and had been referred by the APS program to receive the service.

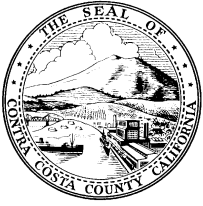
4.3 Targeting

While services funded under this RFP are open to all eligible Contra Costa County residents described above, Contractors are expected to give priority to those most in need and from specific targeted populations that include the following:

1. Greatest Economic Need - persons with greatest economic need is determined by monthly income at or below the Federal Poverty Guidelines.
2. Greatest Social Need - persons with greatest social need is defined as having priority needs due to social factors that may limit their ability to access services and opportunities, including sexual orientation, rural status, racial and ethnic minority background, limited English speaking ability, immigration status, and HIV/AIDS status.
3. Minorities - persons who identify with any of the following groups: American Indian/Alaskan Native, Asian/Pacific Islander, Black, or Hispanic.

4.4 Program Monitoring and Evaluation

The Area Agency on Aging (AAA) will actively monitor services and agencies awarded the contract through this RFP. At a minimum, the Contractor will be expected to:



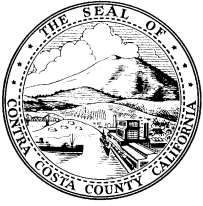
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1. Perform all services without material deviation from an agreed-upon Service Plan, which includes program goals, metrics, deliverables, and client outcomes.
2. Fulfill and comply with the requirements specified in the County's standard contract General Conditions. A copy of County General Conditions (Section 10) is attached to this RFP packet and incorporated herein by reference.
3. Maintain adequate records of services provided, document compliance with Service Plan, complete any forms furnished by the AAA, and provide reports requested by the AAA.
4. Cooperate with the collection of fiscal, administrative, and service data as requested by the AAA, which may require active collaboration and cooperation with other agencies providing similar services.
5. Utilize web-based database and data reporting tools (minimum Excel format), as required by the AAA, to input service activities and other program-related tasks and deliverables.
6. Participate in program monitoring by the AAA and other County entities, as appropriate, which will include a collaborative review of client eligibility and progress, as well as a review of documentation reflecting progress toward meeting services and outcome objectives.
7. Participate in fiscal monitoring which may include review of agency budget, cost allocation plan and procedures, audited financial statements, fiscal policy manual, supporting documentation for selected invoices, and any other related fiscal data that County may request.
8. Be part of the comprehensive and coordinated network of service providers in the County by participating in the development and local implementation of the Master Plan for Aging in Contra Costa County.
9. Attend all mandatory meetings, trainings, and workshops.

4.5 Insurance Requirements

During the entire term of the Contract and any extension or modification thereof, the Contractor shall keep in effect insurance policies meeting the County General Conditions. Contractors are responsible for renewing coverage and updating written certificates during the contract period. Failure to keep current certification(s) on file will delay payments and could result in contract cancellation.

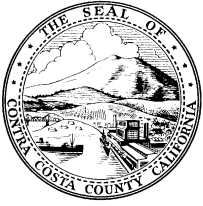


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Contractors must provide evidence of insurance at the coverage levels required by the County. Following are the County's insurance requirements:

- a. **Commercial General Liability Insurance.** For all contracts where the total payment limit of the contract is \$500,000 or less, Contractor will provide commercial general liability insurance, including coverage for business losses and for owned and non-owned automobiles, with a minimum combined single limit coverage of \$500,000 for all damages, including consequential damages, due to bodily injury, sickness or disease, or death to any person or damage to or destruction of property, including the loss of use thereof, arising from each occurrence. Such insurance must be endorsed to include County and its officers and employees as additional insureds as to all services performed by Contractor under this Contract. Said policies must constitute primary insurance as to County, the state and federal governments, and their officers, agents, and employees, so that other insurance policies held by them or their self-insurance program(s) will not be required to contribute to any loss covered under Contractor's insurance policy or policies. Contractor must provide County with a copy of the endorsement making the County an additional insured on all commercial general liability policies as required herein no later than the effective date of this Contract. For all contracts where the total payment limit is greater than \$500,000, the aforementioned insurance coverage to be provided by Contractor must have a minimum combined single limit coverage of \$1,000,000.
- b. **Workers' Compensation.** Contractor must provide workers' compensation insurance coverage for its employees.
- c. **Certificate of Insurance.** The Contractor must provide County with (a) certificate(s) of insurance evidencing liability and worker's compensation insurance as required herein no later than the effective date of this Contract. If Contractor should renew the insurance policy(ies) or acquire either a new insurance policy(ies) or amend the coverage afforded through an endorsement to the policy at any time during the term of this Contract, then Contractor must provide (a) current certificate(s) of insurance.
- d. **Additional Insurance Provisions.** No later than five days after Contractor's receipt of: (i) a notice of cancellation, a notice of an intention to cancel, or a notice of a lapse in any of Contractor's insurance coverage required by this Contract; or (ii) a notice of a material change to Contractor's insurance coverage required by this Contract, Contractor will provide Department a copy of such notice of cancellation, notice of intention to cancel, notice of lapse of coverage, or notice of material change. Contractor's failure to provide Department the notice as required by the preceding sentence is a default under this Contract.



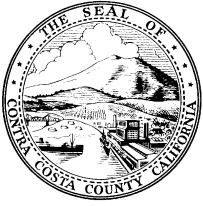
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4.6 APS-ARPA Legal Authorities

The following are the legal authorities governing the Adult Protective Services - American Rescue Plan Act program, including requirements, standards, and guidance. All services and activities are to be provided in accordance with all applicable federal, state, and local laws and regulations, and as those laws and regulations may be amended from time to time, including but not limited to the following:

1. In accordance with the provisions of 2 CFR 200, Subpart F - Audit Requirements, non-Federal entities that expend financial assistance of \$750,000 or more in Federal awards will have a single or a program-specific audit conducted for that year. Non-Federal entities that expend less than \$750,000 a year in Federal awards are exempt from Federal audit requirements for that year, except as noted in 2 CFR 200.503. In accordance with the provisions of Subpart F-Audit Requirements, under 45 CFR Part 75.500, nonfederal entities that expend financial assistance of \$750,000 or more in Federal awards will have a single or a program-specific audit conducted for that year. Nonfederal entities that expend less than \$750,000 a year in Federal awards are exempt from Federal audit requirements for that year. Except as noted in 45 CFR Part 75.500.
2. For regulations, guidelines, and literature, refer to 45 CFR 75 and 45 CFR 1321.
3. The Contractor shall expend all funds received hereunder in accordance with the Agreement.
4. Any reimbursement for authorized travel and per diem shall be at rates not to exceed those amounts paid by the State in accordance with the California Human Resources (CalHR) rules and regulations.
5. The *sub recipient* shall maintain accounting records for funds received under the terms and conditions of the Agreement. These records shall be separate from those for any other funds administered by the *sub recipient*, and shall be maintained in accordance with Generally Accepted Accounting Principles and Procedures and the Office of Management and Budget's (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards [2 CFR 200] [45 CFR 75].
6. The Contractor shall meet the following standards for its fiscal management systems, as stipulated in 2 CFR 200.302 and 45 CFR 75.302.



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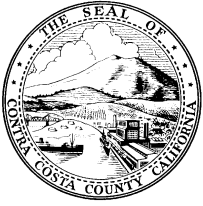
4.7 APS-ARPA Subrecipient Awards and Contractor Responsibilities

If Contractor further passes through federal funds of the APS-ARPA subaward, Contractor shall make case-by-case determinations whether each agreement it makes for the disbursement casts the party receiving the funds in the role of a subrecipient or a Contractor and must observe the following guidelines:

1. Contractor must include information required by 2 CFR Code of Federal Regulations (CFR) §200.331 (Requirements for pass through entities) in each subrecipient's contract.
2. Contractor must monitor its subrecipients consistent with the requirements outlined in the Federal rules and applicable sections of the CFR including 2 CFR §200 (Uniform Guidance).
3. Contractor must evaluate each subrecipient's risk of noncompliance to determine the appropriate fiscal monitoring level, monitor the fiscal activities of subrecipient organizations to ensure that the subaward is in compliance with applicable Federal statutes and regulations and terms of the subaward, and verify that subrecipients are audited as required by Subpart F of 2 CFR §200.
4. Contractor must retain documentation to prove that determinations and monitoring were conducted during the contract term. EHSD, as a pass-through entity, may request those documents during fiscal monitoring.

Contractor must submit to the AAA, monthly information for ongoing program monitoring, which may include, but is not limited to:

1. Number of clients receiving services.
2. Types of services provided or referred to.
3. Demographic characteristics and other client-level data, as required for specific programs.
4. Fiscal and program reports as required by the AAA.
5. A final audit or cost report and settlement as required by AAA.
6. Quarterly progress statements on funding efforts to sustain program.
7. Copies of reports submitted to the California Department of Aging.

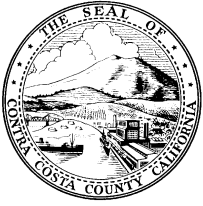


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Additional Contractor requirements include:

1. Participation in monthly Multi-Disciplinary Team meetings.
2. Coordination of services and processes with the APS program.



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SECTION 5: RFP 1191 BIDDER REQUIREMENTS

5.1 Bidder Instructions

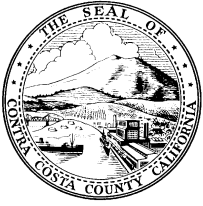
Bidder will submit a proposal under RFP 1191 according to the provisions set forth by the County and the EHSD. Failure to respond to any of the components in the RFP may result in disqualification. Read the ENTIRE RFP and complete the proposal as follows:

1. Submit a mandatory Letter of Intent (LOI) on or before February 1, 2023 by 5:00 p.m. to contractbid@ehsd.cccounty.us. Bids will only be accepted from agencies that have submitted a Letter of Intent by the due date.
2. Attend the recommended online Bidder's Conference on January 25, 2023, 10:00 a.m. – 12:00 p.m. Attendance is highly encouraged but not mandatory. Registration is required prior to being admitted to join the Bidder's Conference. To register, please go to: contractbid@ehsd.cccounty.us
3. Submit questions about this RFP to contractbid@ehsd.cccounty.us with "RFP 1191" in the subject line. Questions must be submitted by February 3, 2023. Responses to questions will be posted on the EHSD website at <https://ehsd.org/overview/contracting-opportunities/> under this RFP on February 10, 2023. Inquiries from individuals or agencies received from any other means will not be accepted.
4. Complete proposal by responding clearly and thoroughly to each of the requested components in Section 6 – RFP Response and Submission Instructions.
5. Complete and submit all required Fiscal attachments, including the Program Budget using the template provided in this RFP (**FORM #4**).
6. Assemble a proposal packet for each service category the Bidder is seeking funding. The Proposal Check List is referenced in Section 8.

5.2 Bidder Requirements

The requirements described in this section are mandatory for all Bidders. Failure to comply will deem the Bidder unresponsive and the proposal incomplete. The County reserves the right to waive any nonmaterial variation.

1. As a component of the Financial Proposal package, Bidder must submit **one (1) copy of the organization's most recent audited financial statements**. If not available, a review or compilation of the financial statements prepared by a Certified Public Accountant (CPA) must be submitted in lieu of audited financial



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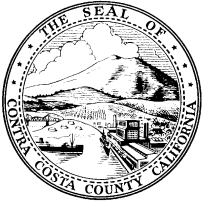
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statements if the latter is not available. A copy of the latest filed tax return must be submitted if a review or compilation of the financial statements prepared by a CPA is not available.

If the organization is subject to the Single Audit requirements set forth in the Code of Federal Regulations, Title 2, Part 200, Subpart F, a copy the organization's most recent Single Audit must be submitted. If awarded a contract, bidders may be required to have audited financial statements during the period of performance.

Submitted financial statements will be part of the evaluation of the proposal and will be scored according to solvency, internal controls, program budget, and overall rating.

2. Proposals and required attachments shall be submitted as specified herein and signed by an authorized agency representative who can bind the Bidder to the proposal submitted and the provisions of this RFP.
3. The County may cancel the RFP at any time without prior written notice if deemed in the best interest of the AAS, EHSD, or the County.
4. A proposal may be withdrawn in person by a Bidder's authorized representative prior to the RFP proposal response submission due date, as reflected in Section 2 - RFP Timeline. If withdrawing a proposal, the Bidder's authorized representative must provide appropriate identification (i.e. driver's license) and sign a receipt attesting to the withdrawal of the Proposal.
5. Programmatic responses must be clear and in the order in which they appear on the Proposal Checklist (Section 8). Proposals must set forth accurate and complete information as required in this RFP. Unclear, incomplete, and/or inaccurate documentation may not be considered for contract award. Falsification of any information may result in disqualification.
6. The selected proposal will be made a part of the awarded contract but is subject to negotiated modifications or revisions by the County to assure that necessary program requirements are covered before the contract is signed.
7. Proposals received are considered the property of the County and will not be returned.
8. All costs of proposal preparation shall be borne by the bidder. The County shall not be liable for any pre-contractual expenses incurred by bidders in the preparation and/or submission of the proposals. Proposals shall not include any such expenses as part of the proposed budget.



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5.3 RFP 1191 Services Sought

Qualified community agencies are invited to submit a proposal for one or more of the services described below. ***A separate and complete application package must be submitted for each service proposed.***

Total award(s) may not exceed the stated funding available in each service category. Reimbursement per unit of service may not exceed the stated rate. Multiple providers may be selected to deliver a service category. Bidders may propose to deliver services countywide or to a targeted population or priority community described in Section 4.3.

EHSD's AAS is seeking proposals for the following services from eligible community agencies that can deliver and commit to advancing person-centered, data informed, and equity-focused approaches and practices envisioned in the Master Plan for Aging:

CASE MANAGEMENT

FUNDING AVAILABLE: \$389,750

Unit Measure: 1 hour

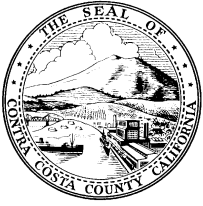
Maximum Reimbursement Rate: \$60/hour

Provides assistance in the form of access coordination in circumstances where the individual is experiencing diminished functioning capacities, personal conditions, or other characteristics that require the provision of services by formal service providers or family caregivers. Activities of case management include such practices as assessing needs, developing care plans, authorizing and coordinating services among providers, and providing follow-up and reassessment, as required.

Bidders proposing to provide Case Management must clearly identify in their proposal whether they intend to serve dependent adults aged 18 years and over referred by the County's APS division or community partners concerned about clients for reasons of abuse, safety, neglect, or self-neglect. Case Management supports for these vulnerable dependent adults or older individuals provide the structure necessary for them to live safely in the least restrictive environment possible.

At a minimum, Case Management contracted provider shall conduct the following:

- a. Identify staff that have the credentials, experience, and education to provide case management services directly with clients. Bidder must include staff resumes in the proposal.
- b. Prioritize services to individuals who are not eligible for other case management programs available in the County, such as CalAIM, Medi-Cal,



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Contra Costa Health Plan Case Management, and Public Health Nursing Case Management.

- c. Conduct a comprehensive assessment to determine the client's needs and develop a care plan with specific goals to meet the needs of individuals.
- d. Identify the locations, modalities, and approaches to deliver services to clients.
- e. Work collaboratively with other services providers for coordinate care, supports, and resources.

Additional requirements for clients referred for APS Case Management include:

- a. Provide services to dependent adult clients 18 years and over that have been determined by the APS program to be at risk of recurring incidents of abuse/neglect or self-neglect without the help of a case manager and linkages to supportive services.
- b. Receive referrals from the County's APS program or service providers that have contacted the APS program and been referred to this service.
- c. Review and implement the client service plan completed by APS, if available, which includes disposition to mitigate the abuse and possibility of future abuse. The client service plan will be used to develop specific action steps for case management.
- d. Allow the amendment and modification of the service plan provided by APS, if any, as a collaborative practice between the case manager and the client. The case manager will identify, arrange, and ensure the delivery of services, including, but not limited to, benefits, in-home care providers, money management services, and short and long-term housing options navigation.

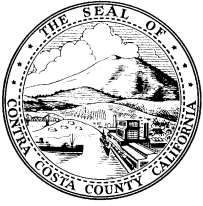
OUTREACH

FUNDING AVAILABLE: \$200,000

Unit Measure: 1 Contact

Maximum Reimbursement Rate: \$25/Contact

One-on-one contacts with individuals initiated by an agency or provider for the purposes of identifying potential clients and encouraging their use of existing services and benefits. Outreach may involve having a navigator on staff who will reach out to targeted groups and communities to identify potential clients in need of assistance in understanding, enrolling, and connecting to resources and services. Potential clients



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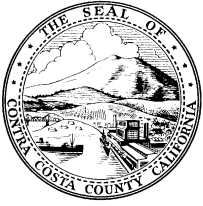
may be reached by producing and disseminating informational materials, tabling at events, and presenting to various groups. Translating outreach materials in multiple languages and presenting to diverse communities in languages other than English are highly encouraged. Targeting historically underserved communities and hard-to-reach populations are highly favorable.

TRANSPORTATION

FUNDING AVAILABLE: \$200,000

Unit Measure: 1 one-way trip (OWT) Maximum Reimbursement Rate: \$20/OWT

Coordinate and provide transportation to eligible individuals from one location to another. May include travel vouchers, transit passes, and other alternative solutions to facilitate client mobility and access to services. Contract provider(s) must establish enrollment, eligibility, and client prioritization criteria.



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SECTION 6: RFP RESPONSE AND SUBMISSION INSTRUCTIONS

6.1 Proposal Formatting Requirements

Responses to this RFP must be in the form of a proposal package containing the complete proposal and all the required supporting information and documents.

Proposal narratives must be accompanied by a clear, concise, and reasonable budget for the grant period from July 1, 2023 to June 30, 2024 using the budget template provided in this RFP (**FORM #4**).

All narrative materials are to be single-spaced, 8 1/2" X 11" page size, with no less than 1" margins on each side of the page. Proposals are to use a typeface no less than size 12-point font and be easily readable.

The total Proposal should not exceed 15 pages excluding cover statement, table of contents, budget schedule, budget narrative, resumes, required fiscal attachments and addendums.

Proposals should be without expensive artwork, unusual printing, or other materials not requested or essential to the utility and clarity of the Proposal. Information on evaluation criteria and weight factors are included in this RFP packet.

All pages should be numbered consecutively with each section identified by an appropriate number.

6.2 Proposal Submission Requirements

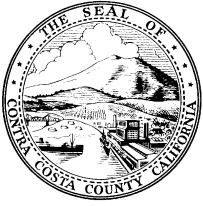
Electronic Submission – RFP Proposal Submissions are accepted via **email only**. Submissions **must be separated into two (2) files**, first file for the Agency Proposal and the second file for the agency's Fiscal Documents.

File #1 Proposal File: Save as "RFP 1191-Agency Name-Proposal." This file must contain the agency's proposal and all required addendums specified in the RFP. Proposal must be signed by officials authorized to bind the Bidder to the provisions of the RFP.

File #2 Fiscal File: Save as "RFP 1191-Agency Name-Financials." This file must contain all required financial documents as specified in the RFP.

Files that exceed 10MB must be compressed into a zip folder before sending.

Attach the Proposal and Fiscal Files and email to: contractbid@ehsd.cccounty.us.



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The submission deadline is February 17, 2023 at 5:00 p.m.

Email should include “RFP 1191 Proposal” in the subject line.

Please reference the “Proposal Response Submission Due Date” reflected in Section 2, RFP Timeline.

Any proposal received after the deadline will be rejected. Mail-in, hand-delivered, and faxed submissions are not acceptable.

6.3 Proposal Outline

Assemble and arrange each proposal in the order reflected on the Proposal Checklist (Section 8) and address all required content/questions. **The order in which items are presented is important**, as proposal reviewers will follow this order in looking for specific areas to evaluate. Refer to Proposal Evaluation Process (Section 7) to assure adherence and responsiveness to scoring requirements.

6.4 Required Documents

Required forms (Section 9), as reflected in the Proposal Checklist (Section 8) and included in this RFP, must be completed fully and incorporated into the submitted proposal package.

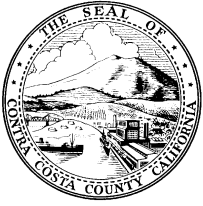
All information and forms included in the proposal package must be presented in the order outlined in the Proposal Checklist and numbered sequentially (excluding the Fiscal Addendums). Electronic templates are posted on the EHSD website under this RFP at <https://ehsd.org/overview/contracting-opportunities/>.

6.4.1 Proposal Cover Statement (Form #1)

Complete the Proposal Cover Page template (**FORM #1**) provided in this RFP. This form must be completed, signed in blue ink, and will serve as the first page/cover of the agency’s proposal. Officials authorized to bind the entity must sign. Do not place anything in front of this page.

6.4.2 Table of Contents

Proposal must include a Table of Contents that clearly identifies each section of the proposal.



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6.4.3 Bidder Narrative Responses

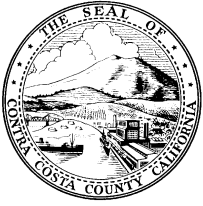
Bidders must respond to the following questions clearly and concisely. **The total Proposal should not exceed 15 pages**, excluding cover statement, table of contents, budget schedule, budget narrative, resumes, required fiscal attachments and addendums. If the total number of pages exceeds the parameters stated herein, **the additional pages will not be reviewed. Submit a separate and complete application packet for each service you are proposing to serve.**

A. AGENCY OVERVIEW, EXPERIENCE, AND CAPABILITY (20 maximum points)

1. Describe the history, mission, purpose, programs/services, and number of years the agency has been in business under the present or prior business name. Include as an Addendum in your proposal the agency's IRS tax exempt letter.
2. Provide a summary of the organization's experience implementing a service relevant to the service described in this RFP for which the agency is seeking funding. Include in your response the number of years of relevant experience the agency has in providing the service proposed.
3. Describe your organization's experience reaching the targeted populations considered priority populations or geographic areas as described in this RFP (see Section 4.3 Targeting). Include any relevant data or information that demonstrates this experience.
4. Describe the organization's experience coordinating and collaborating with local or regional community-based agencies to integrate the service delivery system in Contra Costa County.

B. PROGRAM DESIGN AND APPROACH (50 maximum points)

1. Identify the service your organization proposes to serve, as listed in Section 5.3 RFP 1191 Services Sought. Your response must include the following:
 - a. **Service** proposed.
 - b. **Number of units** to be served.
 - c. **Number of unduplicated individuals** to be served.
 - d. **Geographic** area(s) to be served.
 - e. **Targeted population(s)** to be reached/served.
 - f. **Goals and objectives** for the proposed service.
 - g. **Metrics to evaluate success** (e.g., outcome, impact, etc.) of the proposed service/program.
 - h. **Method to evaluate success** of the proposed service, based on the



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metrics established (refer to your response to item g. above)

- i. **Respond to question:** Is Bidder proposing to serve dependent adults and older persons referred by/for APS Case Management? (check one)
 Yes No N/A - Not applying for Case Management
2. Provide a summary of the design and approach your organization is planning to implement to deliver the service you are seeking funding under this RFP.
3. Describe the organization's strategies to reach the priority targeted populations described in Section 4.3 of this RFP. Describe how your agency will ensure that the proposed service is sensitive and relevant to the racial and cultural backgrounds, languages, disabilities, gender identity, and sexual orientation of the client population.

C. PROGRAM ADMINISTRATION (30 maximum points)

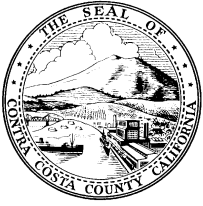
1. Describe the indirect and direct staff that will operate and support the program (e.g., full time equivalencies, responsibilities, experience, licenses, etc.). Include an organizational chart illustrating how the proposed project relates with other agency projects and programs. **Place organizational chart in the Addendum.**
2. Describe the organization's governance. Include job descriptions and/or resumes of the agency's Executive Director/CEO and a list of the organization's Board of Directors **(FORM #3)**. **Place job descriptions and/or resumes in the Addendum.**
3. Using the enclosed Program Budget template and justification **(FORM #4)**, describe the proposed program budget for the proposed service.

6.4.4 Financial Documentation, Narrative, and Budget for Fiscal Review

The Bidder's fiscal information will be used to determine whether adequate financial and other resources are available to support the proposed service. Include an Addendum with the submission if more space is needed to provide the requested information. If any item is not applicable, please note on the form.

Response to this section will be used for the Fiscal Review of the application. Bidders must **score 70% or higher in this section** to advance to the application review process. Bidders that score less than 70% in this section will not advance to the Bureau Review and will not be considered for funding.

- A. Complete and attach the Agency Line Item Program Budget **(FORM #4)**, showing the amount and purpose of requested funds, and the other resources, including in-kind, available to the agency to support this

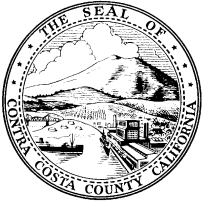


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proposed project. Budgets should reflect common business practices and be adequate to ensure the success of the proposed project. **Check your math.**

1. The indirect cost/overhead line item is intended to cover costs that are necessary to conduct the contract, yet are not readily identified as direct program expenses (e.g. reporting costs, payroll processing, fund development, insurance, other administrative costs, etc.). Indirect costs are limited to 10% of personnel and operating costs and must be described in the budget narrative.
- B. Provide a Fiscal Management Narrative which includes:
1. A brief description of the lead agency's accounting system and internal controls.
 2. Explain how the agency's fiscal system is administered and by whom. Include responsibilities of Board of Directors, Executive Director and fiscal staff in fiscal management. Describe experience and qualifications of fiscal staff. Complete Board of Directors Form **(FORM #3)** and include as an Addendum as referenced in the Proposal Submission Checklist.
 3. Describe internal management and control systems.
 4. Discuss any additional sources of income that have been or will be added to support the proposed project.
 5. Describe how the agency will plan for the long-term sustainability of the proposed project.
 6. Describe all line items included in the budget and the justification for each line item in the budget including what the specific item is, how the specific line item relates to the program and how the amount shown in the budget was arithmetically determined.
- C. If applicable, complete a Line Item Program Budget for each subcontractor showing the amount and purpose of requested funds.
- D. Provide a budget narrative describing all line items included in the subcontractor budget and the Justification for each line item in the budget.
- E. Submit one (1) copy of the agency's most recent audit including any applicable corrective action plans, in the Addendum section referenced in the Proposal Submission Checklist.



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1. A review or compilation of the financial statements prepared by a CPA may be submitted in lieu of an audit/audited financial statements if the latter are not available. A copy of the latest filed tax return must be submitted if a review or compilation is not available.
- F. Submit one (1) copy of current Agency Operating Budget with revenues and expenses indicated.
- G. Describe fiscal procedures and policies or **attach a manual of fiscal procedures and policies** in the Addendum section as referenced in the Proposal Submission Checklist.



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REQUEST FOR PROPOSAL (RFP) 1191

SECTION 7: EVALUATION PROCESS AND CONTRACT AWARD

7.1 Evaluation Process

All proposals complete three (3) stages of evaluation: Compliance Review, Fiscal Review, and Bureau Panel Review. Proposals will be stored in a designated secure location to insure confidentiality. No proposals will be opened until after the submission deadline identified in the RFP. All Bidders submitting proposals by the published due date will be sent a copy of the Award Notification letter. The proposal evaluation stages are as follows:

7.1.1 Compliance Review

Compliance Review will be performed by the EHSD Contracts and Grants Unit for adherence with RFP submission requirements. This will be evaluated on a **pass/fail** standard based on adherence to deadlines and submission requirements. Applications that pass Compliance Review will be advanced for Fiscal Review.

7.1.2 Fiscal Review

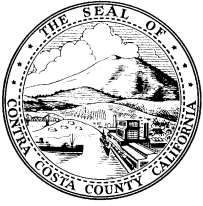
Fiscal Review will be performed by the EHSD Fiscal Division. Submitted financial statements described in Section 6.4 will be evaluated and scored according to program budget, solvency, and internal controls. Each proposal must receive a **minimum score of 70%** of the total available 100 points on the Fiscal Review to be forwarded to the Bureau Evaluation Panel for consideration.

7.1.3 Bureau Committee Review

RFP Proposals that successfully complete the Contracts Compliance Review and the Fiscal Review (referenced above) will be submitted for Bureau Committee Review. Evaluation Panel review will be performed by a team that may include EHSD and other County department staff, technical experts outside the County, consumers, and members of the Contra Costa County Advisory Council on Aging. The Panel will evaluate and score the proposals in the manner submitted by the applicant.

7.2 Scoring Methodology

Program elements will be weighted as follows with a maximum score of 100 points using the following criteria guidelines. **Proposals that do not attain an average of 70 points from the Bureau Review Committee are unlikely to be eligible for further consideration for funding.**



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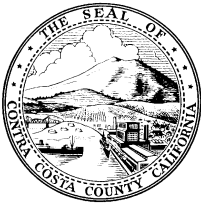
BUREAU COMMITTEE REVIEW SCORING SHEET

A. Agency Overview, Experience, and Capability – 20 Possible Points

Evaluation Criteria	Weight	Max Points
1. Describe the history, mission, purpose, programs/services, and number of years the agency has been in business under the present or prior business name. Include as an Addendum in your proposal the agency's IRS tax exempt letter.	1.0	5
2. Provide a summary of the organization's experience implementing a service relevant to the service described in this RFP for which the agency is seeking funding. Include in your response the number of years of relevant experience the agency has in providing the service proposed.	1.0	5
3. Describe your organization's experience reaching the targeted populations considered priority populations or geographic areas as described in this RFP (see Section 4.3 Targeting). Include any relevant data or information that demonstrates this experience.	1.0	5
4. Describe the organization's experience coordinating and collaborating with local or regional community-based agencies to integrate the service delivery system in Contra Costa County.	1.0	5

B. Program Design, Approach, and Administration – 50 Possible Points

Evaluation Criteria	Weight	Max Points
1. Identify the service your organization proposes to serve, as listed in Section 5.3 RFP 1191 Services Sought. Your response must include the following: a. Service proposed. b. Number of units to be served. c. Number of unduplicated individuals to be served. d. Geographic area(s) to be served. e. Targeted population(s) to be reached/served. f. Goals and objectives for the proposed service. g. Metrics to evaluate success (e.g., outcome, impact, etc.) of the proposed service/program.	4.0	20



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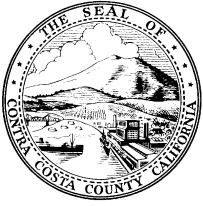
<p>h. Method to evaluate success of the proposed service, based on the metrics established (refer to your response to item g. above)</p> <p>i. Respond to question: Is Bidder proposing to serve dependent adults and older persons referred by/for APS Case Management? (check one) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</p>		
<p>2. Provide a summary of the design and approach your organization is planning to implement to deliver the service you are seeking funding under this RFP.</p>	3.0	15
<p>3. Describe the organization’s strategies to reach the priority targeted populations described in Section 4.3 of this RFP. Describe how your agency will ensure that the proposed service is sensitive and relevant to the racial and cultural backgrounds, languages, disabilities, gender identity, and sexual orientation of the client population.</p>	3.0	15

C. Program Administration – 30 Possible Points

Evaluation Criteria	Weight	Max Points
<p>1. Describe the indirect and direct staff that will operate and support the program (e.g., full time equivalencies, responsibilities, experience, licenses, etc.). Include an organizational chart illustrating how the proposed project relates with other agency projects and programs. Place organizational chart in the Addendum.</p>	2.0	10
<p>2. Describe the organization’s governance. Include job descriptions and/or resumes of the agency’s Executive Director/CEO and key program staff. Place job descriptions and/or resumes in the Addendum.</p>	1.0	5
<p>3. Using the enclosed Program Budget template and justification (FORM #4), describe the proposed program budget for the proposed service.</p>	3.0	15

BUREAU COMMITTEE REVIEW MAXIMUM SCORE

100



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7.3 Appeal Process

All Bidders will receive an emailed notification from EHSD informing them of the funding decisions. Only Bidders that submitted a proposal in accordance with this RFP shall have an opportunity to appeal the funding decision of EHSD. **Proposals disqualified for not meeting the deadline for submission are not eligible for appeal.**

If a Bidder wishes to appeal the selection or award decision, the bidder must submit a written appeal request that includes the following information:

1. Area(s) of contention.
2. How the organization was damaged.
3. A recommended solution.

An appeal will only be considered valid if there has been a violation of one of the following criteria:

- The procurement process as outlined by the RFP was violated in some manner; and/or
- Federal, state, and/or EHSD procurement guidelines have been violated.

An appeal would not be allowed:

- To contest individual scores, the rating system, or dissatisfaction with the evaluation results unless there is a violation of the process as outlined above.

Letters of appeal must be sent via email to:

EHSD Director
RE: RFP 1191 Appeal
contract_clerk@ehsd.cccounty.us

Letters of appeals must be sent and received no later than 5:00 p.m. by the tenth (10) business day from the date email is sent of the award status. The appeal will be conducted in accordance with the EHSD process.

The County's appeal decision is final. Notification of a final decision on an appeal shall be made in writing to the Bidder.

7.4 Contract Award and Negotiation

The successful Bidder(s) will be expected to promptly enter into contract negotiation with EHSD. This may result in mutually agreed upon changes in plans or activities identified in the Proposal. As a result of this negotiation, the actual contract may include other agreements and clarifications of activities, consistent with the intent of this RFP.



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Services will begin upon the signing of a contract according to a mutually agreed upon start-up schedule. The County is not liable for any cost incurred by contractor prior to the effective date of any contract.

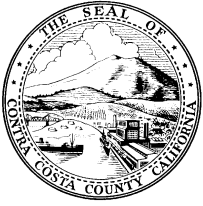
Selected Contractor(s) will be responsible for all services offered in their RFP Proposal, whether or not Contractor(s) perform them directly or through subcontractors in multiple agency collaboration.

EHSD will actively monitor service implementation and delivery and provide contract monitoring. Any material breach of contract requirements will constitute grounds for terminating the Contract.

7.5 Contract Term and Litigation Warranty

EHSD will negotiate contract terms and agreements with the successful Bidder(s). Satisfactory performance and delivery of services are conditions of contract renewal. Contract term may be renewed, depending upon funding availability, satisfactory performance of the contractor, and continued prioritization of the contracted service in the Contra Costa Master Plan for Aging.

Bidders, by submitting a Proposal, warrant that they are not currently involved in litigation or arbitration concerning their performance as it relates to the same or similar services to be supplied pursuant to the referenced contract and that no judgments or awards have been made against the Bidder on the basis of their performance in supplying the same or similar services, unless such fact is disclosed to EHSD in the Proposal. Disclosure will not automatically disqualify the Bidder; however, EHSD reserves the right to evaluate proposal(s) on the basis of facts surrounding such litigation or arbitration. These will be reviewed and decided upon at the discretion of EHSD.



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SECTION 8: PROPOSAL CHECKLIST

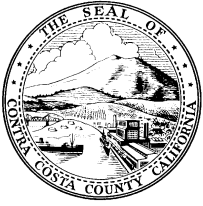
All items listed below shall be completed and included in submittal package at time of submission to County as per the RFP. This list is intended to assist responding organizations. It is the sole responsibility of each responding organization to ensure that their proposal conforms to the requirements of the RFP. Forms are provided in Section 9.

File #1 Proposal File:

- Proposal Cover Statement (Form #1)**
- Table of Contents**
- Program Narrative**
 - Agency Overview, Experience, and Capability (20 points)
 - Program Design and Approach (50 points)
 - Program Administration (30 points)
- Proposal Addendums**
 - Statement of Qualifications (Form #2** with original signatures must accompany original proposal), completed and signed by Agency Executive Director and President of Agency Board of Directors.
 - Organizational Chart**
 - Job Descriptions and/or Resumes of Executive Director and Key Program and Fiscal Staff**
 - 1 copy of Bidder's IRS 501(c)(3) determination letter attached to original proposal copy (if agency is a non-profit organization).
 - Agency Brochure (as available)**

File #2 Fiscal File:

- Fiscal Management Narrative**
- Board of Directors Form (Form #3)**
- Budget and Budget Narrative (Form #4; Excel Workbook)**
- Fiscal Addendums**
 - 1 copy of Bidder's manual of fiscal procedures and policies, if available, attached to original proposal copy (reference Section 6.4.4).
 - 1 copy of Bidder's last audited financial statement attached to original proposal copy. (Reference Section 6.4.4 for alternate submission requirements if audited financial statements are not available).
 - 1 copy of current Agency Budget with revenues and expenses indicated (reference Section 6.4.4).



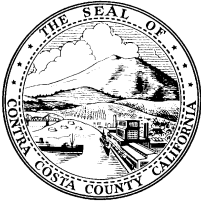
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SECTION 9: REQUIRED FORMS

All forms must be completed and attached to submitted proposals

<u>Form #</u>	<u>Form Title</u>
9.1 #1	Proposal Cover Statement
9.2 #2	Statement of Qualifications
9.3 #3	Board of Directors
9.4 #4	Budget (Excel Workbook; Summary, Budget Form)

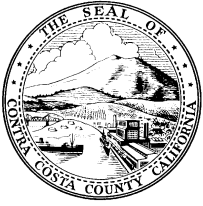


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9.1 FORM #1: Proposal Cover Statement

PROPOSAL COVER STATEMENT – RFP 1191	
BIDDER ORGANIZATION NAME	
ADDRESS	Bidder Phone
	Bidder Fax
	Web Address
CONTACT PERSON	Contact Phone
	Contact E-mail
	Contact Fax
ADDRESS OF PROGRAM (if different than above)	
PROGRAM TITLE	
COLLABORATIVE PARTNERS/SUBCONTRACTORS (If applicable)	
AMOUNT OF FUNDING REQUEST	
TOTAL AMOUNT REQUESTED	\$ _____
FEDERAL EMPLOYER NUMBER	501(C)(3) EXEMPTION _____
AGENCY PRIOR YEAR NET OPERATING BUDGET	\$ _____
AUTHORIZATION	
<p><i>We submit the attached response to the Notice of Request for Proposal No. ___ dated _____ and all attachments and declare that: If this Response is accepted by the Board of Supervisors of Contra Costa County, I will enter into a standard contract with Contra Costa County to provide all work specified herein at the costs, which I have proposed, or in accordance with modifications required by Contra Costa County. Funds obtained through this contract will not be used to supplant or augment funding for other programs operated by the bidder/contractor unless stipulated within the proposal and accepted by the County.</i></p>	
AUTHORIZED REPRESENTATIVES: (two signatures required)	
Name: _____	Title: Executive Director
Signature: _____	Date: _____
Name: _____	Title: Board President
Signature: _____	Date: _____



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9.2 FORM #2: Statement of Qualifications

1. List any licenses or certifications held by the agency, with expiration dates.

2. a) Who administers the agency's fiscal system?

Name: _____

Phone: _____

Title: _____

Work Schedule: _____

b) What CPA firm prepares the agency's annual audit?

Name: _____

Phone: _____

Address _____

3. Number of years' bidder operated under the present business name. List related prior business names, if any and timeframe for each.

4. Number of years' bidder has provided the services described in this proposal or related services.

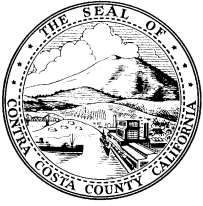
5. Has bidder failed or refused to complete any contract? Yes _____ No _____
If yes, briefly explain.

6. Is there any past, present or pending litigation in connection with contracts for services involving the bidder or any principal officer of the agency? Yes _____ No _____
If yes, briefly explain.

7. Does bidder have a controlling interest in any other firm(s)? Yes _____ No _____

8. Does bidder have commitments or potential commitments that may impact assets, lines of credit or otherwise affect agency's ability to fulfill this RFP? Yes _____ No _____
If yes, specify below.

9. Supply names, addresses and phone numbers of two references, one each in the areas of financial/administrative management and social service delivery to substantiate experience and qualifications.



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FORM #2, Continued

Bidder attests, under penalty of perjury, that all information provided herein is complete and accurate. Bidder agrees to provide to County other information the County may request as necessary for an accurate determination of bidder's qualifications to perform proposed services.

Signature

Date

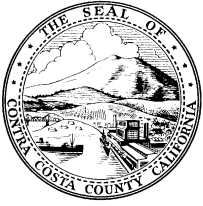
Printed Name and Title (Executive Director)

Signature

Date

Printed Name and Title (Board President)

Note: When more than one agency will collaborate in providing services(s), above signatures are required of only the lead agency. Lead agency will certify that each member of the agency consortium will meet service and fiscal requirements.



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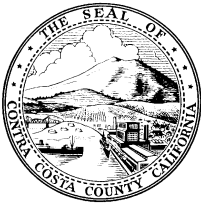
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9.3 FORM #3: Board of Directors

1. Number of Board members required by agency's bylaws: _____
2. Number of members on current Board: _____
3. When and how often does the Board meet: _____
4. List current Board members below (or attach Board List in this format):

Member Name	Address	Occupation/ Affiliation	Board Position	# Years on Board

5. Describe key roles and responsibilities of the Board: _____



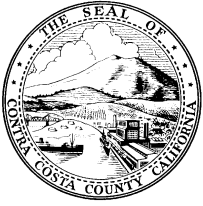
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9.4 FORM #4: Budget (Excel Workbook)

ATTACHMENT A: BUDGET OF ESTIMATED PROGRAM EXPENDITURES

Entity Legal Name:	
Term Start Date:	
Term End Date:	
Cost Reimbursement Amount	
In-Kind Match Amount (If Applicable)	
Total Budget with Match	\$ -
BUDGET CATEGORY DESCRIPTION	BUDGETED COST REIMBURSEM
	\$ -
OPERATING COSTS	\$ -
OTHER COSTS	\$ -
PARTICIPANT COSTS	\$ -
INDIRECT OVERHEAD AND/OR ADMINISTRATIVE COSTS	\$ -
COST REIMBURSEMENT AMOUNT	\$ -
BUDGET - IN-KIND MATCH (If Applicable)	IN-KIND AMOUNT
IN-KIND MATCH	\$ -
IN-KIND AMOUNT	\$ -
Cost Reimbursement Amount	\$ -
In-Kind/Match Amount	\$ -
Total Budget	\$ -
BUDGET AMOUNTS FROM CELLS B6 & B7	\$ -
MUST BE ZERO	\$ -



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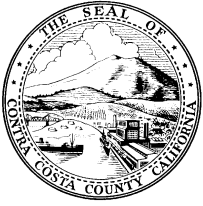
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SECTION 10: APPENDICES

10.1 GENERAL CONDITIONS

1. **Compliance with Law**. Contractor is subject to and must comply with all applicable federal, state, and local laws and regulations with respect to its performance under this Contract, including but not limited to, licensing, employment, and purchasing practices; and wages, hours, and conditions of employment, including nondiscrimination.
2. **Inspection**. Contractor's performance, place of business, and records pertaining to this Contract are subject to monitoring, inspection, review and audit by authorized representatives of the County, the State of California, and the United States Government.
3. **Records**. Contractor must keep and make available for inspection and copying by authorized representatives of the County, the State of California, and the United States Government, the Contractor's regular business records and such additional records pertaining to this Contract as may be required by the County.
 - a. **Retention of Records**. Contractor must retain all documents pertaining to this Contract for five years from the date of submission of Contractor's final payment demand or final Cost Report; for any further period that is required by law; and until all federal/state audits are complete and exceptions resolved for this Contract's funding period. Upon request, Contractor must make these records available to authorized representatives of the County, the State of California, and the United States Government.
 - b. **Access to Books and Records of Contractor, Subcontractor**. Pursuant to Section 1861(v)(1) of the Social Security Act, and any regulations promulgated thereunder, Contractor must, upon written request and until the expiration of five years after the furnishing of services pursuant to this Contract, make available to the County, the Secretary of Health and Human Services, or the Comptroller General, or any of their duly authorized representatives, this Contract and books, documents, and records of Contractor necessary to certify the nature and extent of all costs and charges hereunder.

Further, if Contractor carries out any of the duties of this Contract through a subcontract with a value or cost of \$10,000 or more over a twelve-month period, such subcontract must contain a clause to the effect that upon written request and until the expiration of five years after the furnishing of services pursuant to such subcontract, the subcontractor must make available to the County, the Secretary, the Comptroller General, or any of their duly authorized



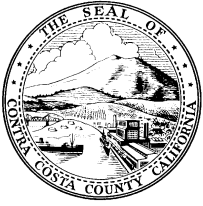
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representatives, the subcontract and books, documents, and records of the subcontractor necessary to verify the nature and extent of all costs and charges thereunder.

This provision is in addition to any and all other terms regarding the maintenance or retention of records under this Contract and is binding on the heirs, successors, assigns and representatives of Contractor.

4. **Reporting Requirements.** Pursuant to Government Code Section 7550, Contractor must include in all documents and written reports completed and submitted to County in accordance with this Contract, a separate section listing the numbers and dollar amounts of all contracts and subcontracts relating to the preparation of each such document or written report. This section applies only if the Payment Limit of this Contract exceeds \$5,000.
5. **Termination and Cancellation.**
 - a. **Written Notice.** This Contract may be terminated by either party, in its sole discretion, upon thirty-day advance written notice thereof to the other, and may be cancelled immediately by written mutual consent.
 - b. **Failure to Perform.** County, upon written notice to Contractor, may immediately terminate this Contract should Contractor fail to perform properly any of its obligations hereunder. In the event of such termination, County may proceed with the work in any reasonable manner it chooses. The cost to County of completing Contractor's performance will be deducted from any sum due Contractor under this Contract, without prejudice to County's rights to recover damages.
 - c. **Cessation of Funding.** Notwithstanding any contrary language in Paragraphs 5 and 11, in the event that federal, state, or other non-County funding for this Contract ceases, this Contract is terminated without notice.
6. **Entire Agreement.** This Contract contains all the terms and conditions agreed upon by the parties. Except as expressly provided herein, no other understanding, oral or otherwise, regarding the subject matter of this Contract will be deemed to exist or to bind any of the parties hereto.
7. **Further Specifications for Operating Procedures.** Detailed specifications of operating procedures and budgets required by this Contract, including but not limited to, monitoring, evaluating, auditing, billing, or regulatory changes, may be clarified in a written letter signed by Contractor and the department head, or designee, of the county department on whose behalf this Contract is made. No written clarification



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prepared pursuant to this Section will operate as an amendment to, or be considered to be a part of, this Contract.

8. Modifications and Amendments.

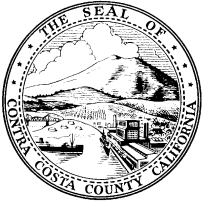
- a. **General Amendments.** In the event that the total Payment Limit of this Contract is less than \$100,000 and this Contract was executed by the County's Purchasing Agent, this Contract may be modified or amended by a written document executed by Contractor and the County's Purchasing Agent or the Contra Costa County Board of Supervisors, subject to any required state or federal approval. In the event that the total Payment Limit of this Contract exceeds \$100,000 or this Contract was initially approved by the Board of Supervisors, this Contract may be modified or amended only by a written document executed by Contractor and the Contra Costa County Board of Supervisors or, after Board approval, by its designee, subject to any required state or federal approval.
- b. **Minor Amendments.** The Payment Provisions and the Service Plan may be amended by a written administrative amendment executed by Contractor and the County Administrator (or designee), subject to any required state or federal approval, provided that such administrative amendment may not increase the Payment Limit of this Contract or reduce the services Contractor is obligated to provide pursuant to this Contract.

9. **Disputes.** Disagreements between County and Contractor concerning the meaning, requirements, or performance of this Contract shall be subject to final written determination by the head of the county department for which this Contract is made, or his designee, or in accordance with the applicable procedures (if any) required by the state or federal government.

10. Choice of Law and Personal Jurisdiction.

- a. This Contract is made in Contra Costa County and is governed by, and must be construed in accordance with, the laws of the State of California.
- b. Any action relating to this Contract must be instituted and prosecuted in the courts of Contra Costa County, State of California.

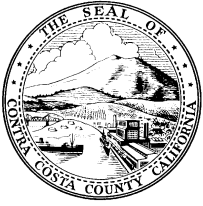
11. **Conformance with Federal and State Regulations and Laws.** Should federal or state regulations or laws touching upon the subject of this Contract be adopted or revised during the term hereof, this Contract will be deemed amended to assure conformance with such federal or state requirements.



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12. **No Waiver by County.** Subject to Paragraph 9. (Disputes) of these General Conditions, inspections or approvals, or statements by any officer, agent or employee of County indicating Contractor's performance or any part thereof complies with the requirements of this Contract, or acceptance of the whole or any part of said performance, or payments therefor, or any combination of these acts, do not relieve Contractor's obligation to fulfill this Contract as prescribed; nor is the County thereby prevented from bringing any action for damages or enforcement arising from any failure to comply with any of the terms and conditions of this Contract.
13. **Subcontract and Assignment.** This Contract binds the heirs, successors, assigns and representatives of Contractor. Prior written consent of the County Administrator or his designee, subject to any required state or federal approval, is required before the Contractor may enter into subcontracts for any work contemplated under this Contract, or before the Contractor may assign this Contract or monies due or to become due, by operation of law or otherwise.
14. **Independent Contractor Status.** The parties intend that Contractor, in performing the services specified herein, is acting as an independent contractor and that Contractor will control the work and the manner in which it is performed. This Contract is not to be construed to create the relationship between the parties, or between County and any Contractor employee, of agent, servant, employee, partnership, joint venture, or association. Neither Contractor, nor any of its employees, is a County employee. This Contract does not give Contractor, or any of its employees, any right to participate in any pension plan, workers' compensation plan, insurance, bonus, or similar benefits County provides to its employees. In the event that County exercises its right to terminate this Contract, Contractor expressly agrees that it will have no recourse or right of appeal under any rules, regulations, ordinances, or laws applicable to employees.
15. **Conflicts of Interest.** Contractor covenants that it presently has no interest and that it will not acquire any interest, direct or indirect, that represents a financial conflict of interest under state law or that would otherwise conflict in any manner or degree with the performance of its services hereunder. Contractor further covenants that in the performance of this Contract, no person having any such interests will be employed by Contractor. If requested to do so by County, Contractor will complete a "Statement of Economic Interest" form and file it with County and will require any other person doing work under this Contract to complete a "Statement of Economic Interest" form and file it with County. Contractor covenants that Contractor, its employees and officials, are not now employed by County and have not been so employed by County within twelve months immediately preceding this Contract; or, if so employed, did not then and do not now occupy a position that would create a conflict of interest under Government Code section 1090. In addition to any indemnity provided by Contractor in this Contract, Contractor will indemnify, defend,

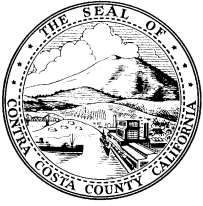


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and hold the County harmless from any and all claims, investigations, liabilities, or damages resulting from or related to any and all alleged conflicts of interest. Contractor warrants that it has not provided, attempted to provide, or offered to provide any money, gift, gratuity, thing of value, or compensation of any kind to obtain this Contract.

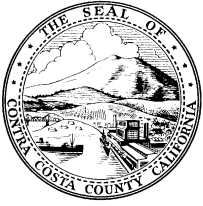
16. **Confidentiality**. To the extent allowed under the California Public Records Act, Contractor agrees to comply and to require its officers, partners, associates, agents and employees to comply with all applicable state or federal statutes or regulations respecting confidentiality, including but not limited to, the identity of persons served under this Contract, their records, or services provided them, and assures that no person will publish or disclose or permit or cause to be published or disclosed, any list of persons receiving services, except as may be required in the administration of such service. Contractor agrees to inform all employees, agents and partners of the above provisions, and that any person knowingly and intentionally disclosing such information other than as authorized by law may be guilty of a misdemeanor.
17. **Nondiscriminatory Services**. Contractor agrees that all goods and services under this Contract will be available to all qualified persons regardless of age, gender, race, religion, color, national origin, ethnic background, disability, or sexual orientation, and that none will be used, in whole or in part, for religious worship.
18. **Indemnification**. Contractor will defend, indemnify, save, and hold harmless County and its officers and employees from any and all claims, demands, losses, costs, expenses, and liabilities for any damages, fines, sickness, death, or injury to person(s) or property, including any and all administrative fines, penalties or costs imposed as a result of an administrative or quasi-judicial proceeding, arising directly or indirectly from or connected with the services provided hereunder that are caused, or claimed or alleged to be caused, in whole or in part, by the negligence or willful misconduct of Contractor, its officers, employees, agents, contractors, subcontractors, or any persons under its direction or control. If requested by County, Contractor will defend any such suits at its sole cost and expense. If County elects to provide its own defense, Contractor will reimburse County for any expenditures, including reasonable attorney's fees and costs. Contractor's obligations under this section exist regardless of concurrent negligence or willful misconduct on the part of the County or any other person; provided, however, that Contractor is not required to indemnify County for the proportion of liability a court determines is attributable to the sole negligence or willful misconduct of the County, its officers and employees. This provision will survive the expiration or termination of this Contract.
19. **Insurance**. During the entire term of this Contract and any extension or modification thereof, Contractor shall keep in effect insurance policies meeting the following insurance requirements unless otherwise expressed in the Special Conditions:



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- a. **Commercial General Liability Insurance.** For all contracts where the total payment limit of the contract is \$500,000 or less, Contractor will provide commercial general liability insurance, including coverage for business losses and for owned and non-owned automobiles, with a minimum combined single limit coverage of \$500,000 for all damages, including consequential damages, due to bodily injury, sickness or disease, or death to any person or damage to or destruction of property, including the loss of use thereof, arising from each occurrence. Such insurance must be endorsed to include County and its officers and employees as additional insureds as to all services performed by Contractor under this Contract. Said policies must constitute primary insurance as to County, the state and federal governments, and their officers, agents, and employees, so that other insurance policies held by them or their self-insurance program(s) will not be required to contribute to any loss covered under Contractor's insurance policy or policies. Contractor must provide County with a copy of the endorsement making the County an additional insured on all commercial general liability policies as required herein no later than the effective date of this Contract. For all contracts where the total payment limit is greater than \$500,000, the aforementioned insurance coverage to be provided by Contractor must have a minimum combined single limit coverage of \$1,000,000.
 - b. **Workers' Compensation.** Contractor must provide workers' compensation insurance coverage for its employees.
 - c. **Certificate of Insurance.** The Contractor must provide County with (a) certificate(s) of insurance evidencing liability and worker's compensation insurance as required herein no later than the effective date of this Contract. If Contractor should renew the insurance policy(ies) or acquire either a new insurance policy(ies) or amend the coverage afforded through an endorsement to the policy at any time during the term of this Contract, then Contractor must provide (a) current certificate(s) of insurance.
 - d. **Additional Insurance Provisions.** No later than five days after Contractor's receipt of: (i) a notice of cancellation, a notice of an intention to cancel, or a notice of a lapse in any of Contractor's insurance coverage required by this Contract; or (ii) a notice of a material change to Contractor's insurance coverage required by this Contract, Contractor will provide Department a copy of such notice of cancellation, notice of intention to cancel, notice of lapse of coverage, or notice of material change. Contractor's failure to provide Department the notice as required by the preceding sentence is a default under this Contract.
20. **Notices.** All notices provided for by this Contract must be in writing and may be delivered by deposit in the United States mail, postage prepaid. Notices to County must be addressed to the head of the county department for which this Contract is made. Notices to Contractor must be addressed to the Contractor's address

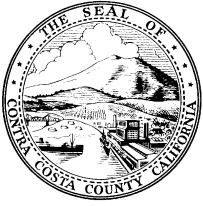


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designated herein. The effective date of notice is the date of deposit in the mails or of other delivery, except that the effective date of notice to County is the date of receipt by the head of the county department for which this Contract is made.

21. **Primacy of General Conditions.** In the event of a conflict between the General Conditions and the Special Conditions, the General Conditions govern unless the Special Conditions or Service Plan expressly provide otherwise.
22. **Nonrenewal.** Contractor understands and agrees that there is no representation, implication, or understanding that the services provided by Contractor under this Contract will be purchased by County under a new contract following expiration or termination of this Contract, and Contractor waives all rights or claims to notice or hearing respecting any failure to continue purchasing all or any such services from Contractor.
23. **Possessory Interest.** If this Contract results in Contractor having possession of, claim or right to the possession of land or improvements, but does not vest ownership of the land or improvements in the same person, or if this Contract results in the placement of taxable improvements on tax exempt land (Revenue & Taxation Code Section 107), such interest or improvements may represent a possessory interest subject to property tax, and Contractor may be subject to the payment of property taxes levied on such interest. Contractor agrees that this provision complies with the notice requirements of Revenue & Taxation Code Section 107.6, and waives all rights to further notice or to damages under that or any comparable statute.
24. **No Third-Party Beneficiaries.** Nothing in this Contract may be construed to create, and the parties do not intend to create, any rights in third parties.
25. **Copyrights, Rights in Data, and Works Made for Hire.** Contractor will not publish or transfer any materials produced or resulting from activities supported by this Contract without the express written consent of the County Administrator. All reports, original drawings, graphics, plans, studies and other data and documents, in whatever form or format, assembled or prepared by Contractor or Contractor's subcontractors, consultants, and other agents in connection with this Contract are "works made for hire" (as defined in the Copyright Act, 17 U.S.C. Section 101 et seq., as amended) for County, and Contractor unconditionally and irrevocably transfers and assigns to Agency all right, title, and interest, including all copyrights and other intellectual property rights, in or to the works made for hire. Unless required by law, Contractor shall not publish, transfer, discuss, or disclose any of the above-described works made for hire or any information gathered, discovered, or generated in any way through this Agreement, without County's prior express written consent. If any of the works made for hire is subject to copyright protection, County reserves the right to copyright such works and Contractor agrees not to copyright



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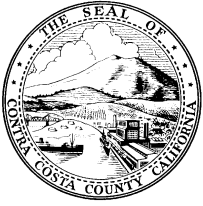
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such works. If any works made for hire are copyrighted, County reserves a royalty-free, irrevocable license to reproduce, publish, and use the works made for hire, in whole or in part, without restriction or limitation, and to authorize others to do so.

26. Endorsements. In its capacity as a contractor with Contra Costa County, Contractor will not publicly endorse or oppose the use of any particular brand name or commercial product without the prior written approval of the Board of Supervisors. In its County-contractor capacity, Contractor will not publicly attribute qualities or lack of qualities to a particular brand name or commercial product in the absence of a well-established and widely accepted scientific basis for such claims or without the prior written approval of the Board of Supervisors. In its County-contractor capacity, Contractor will not participate or appear in any commercially produced advertisements designed to promote a particular brand name or commercial product, even if Contractor is not publicly endorsing a product, as long as the Contractor's presence in the advertisement can reasonably be interpreted as an endorsement of the product by or on behalf of Contra Costa County. Notwithstanding the foregoing, Contractor may express its views on products to other contractors, the Board of Supervisors, County officers, or others who may be authorized by the Board of Supervisors or by law to receive such views.

27. Required Audit.

- a. If Contractor expends \$750,000 or more in federal grant funds in any fiscal year from any source, Contractor must provide to County, at Contractor's expense, an audit conforming to the requirements set forth in the most current version of Code of Federal Regulations, Title 2, Part 200, Subpart F.
- b. If Contractor expends less than \$750,000 in federal grant funds in any fiscal year from any source, but the grant imposes specific audit requirements, Contractor must provide County with an audit conforming to those requirements.
- c. If Contractor expends less than \$750,000 in federal grant funds in any fiscal year from any source, Contractor is exempt from federal audit requirements for that year except as required by Code of Federal Regulations, Title 2, Part 200, Subpart F. Contractor shall make its records available for, and an audit may be required by, appropriate officials of the federal awarding agency, the General Accounting Office, the pass-through entity and/or the County. If an audit is required, Contractor must provide County with the audit.
- d. With respect to the audits specified in sections (a), (b) and (c) above, Contractor is solely responsible for arranging for the conduct of the audit, and for its cost. County may withhold the estimated cost of the audit or 10 percent of the contract amount, whichever is greater, or the final payment, from Contractor until County receives the audit from Contractor.



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28. **Authorization**. Contractor, or the representative(s) signing this Contract on behalf of Contractor, represents and warrants that it has full power and authority to enter into this Contract and to perform the obligations set forth herein.
29. **No Implied Waiver**. The waiver by County of any breach of any term or provision of this Contract will not be deemed to be a waiver of such term or provision or of any subsequent breach of the same or any other term or provision contained herein.