



Contra Costa County

**REQUEST FOR PROPOSAL (RFP) 1227
Community Action Projects**



REQUEST FOR PROPOSAL

Community Action Projects

RFP # 1227

ISSUE DATE: September 4, 2025

**PROPOSAL DUE DATE: Friday, October 3, 2025,
no later than 5:00 PM PST**

**CONTRA COSTA COUNTY
EMPLOYMENT & HUMAN SERVICES DEPARTMENT
COMMUNITY SERVICES BUREAU
40 DOUGLAS DRIVE
MARTINEZ, CALIFORNIA 94553**



Contra Costa County (County) Employment and Human Services Department (EHSD) announces Request for Proposals (RFP) 1227. This RFP is seeking applications from eligible organizations to design and deliver Community Action Projects in alignment with the 2026-27 Contra Costa County Community Action Plan.

Selected organizations may be awarded up to, but not more than, \$200,000 annually or up to \$400,000 for two (2) years, contingent upon the availability of additional funding, to implement Community Action projects in the area(s) of affordable housing/shelter/rental assistance, food security/nutrition, mental health access, and/or employment/living wage jobs. Awarded amounts typically range from \$40,000 to \$80,000 per organization. Grants are awarded for a two (2) year period.

Please read this entire packet carefully.

**Interested parties are invited to attend the recommended
Bidders' Conference/Informational Session
scheduled for
Thursday, September 11, 2025
Time: 10:00 AM – Noon**

Attendance at the Bidders' Conference is not required for a proposal to be considered. Bidders' Conference attendance is virtual via the EHSD RFP 1227 Community Action Projects webinar. Agencies interested in attending the virtual Bidders' Conference must register at the following website address:

<https://attendee.gotowebinar.com/register/8920179955916913759>

**Final proposal submission will be due
by 5:00 PM on Friday, October 3, 2025**

Questions about RFP 1227 or the County's procurement process must be submitted in writing to contractbid@ehsd.cccounty.us. Questions will be accepted through September 11, 2025. All comments and inquiries received will be posted publicly along with the response on Friday, September 26, 2025 at: <https://ehsd.org/overview/contracting-opportunities/> under this RFP.

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



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SECTION 1: LEGAL NOTICE

COMMUNITY ACTION PROJECTS

The Contra Costa County Employment and Human Services Department (EHSD), Community Services Bureau (CSB), announces the issuance of **Request for Proposals (RFP) 1227**, making up to \$820,000 in funding available over a two-year period for qualified organization(s) with interest, expertise, and experience in implementing anti-poverty programs to Contra Costa County residents living at or below 200% of the Federal Poverty Level.

The funding will be available from the period of March 1, 2026, to February 28, 2028, with a maximum funding limit of \$820,000. EHSD will award selected organization(s) a two (2) year contract up to, but not more than \$400,000 or up to \$200,000 annually, contingent on the availability of additional funding, to implement Community Action projects in the area(s) of affordable housing/shelter/rental assistance, food security/nutrition, mental health access, and/or employment/living wage jobs. Awarded amounts typically range from \$40,000 to \$80,000 per organization over the two (2) year period.

A Recommended Bidders' Conference is scheduled for **Thursday, September 11, 2025 from 10:00 AM to 12:00 PM PST**. Participation in the Bidders' Conference is recommended but not required for a proposal to be considered. The Bidder's Conference will be held online using the following link and requires pre-registration to join at: <https://attendee.gotowebinar.com/register/8920179955916913759>

Submission of proposals in response to RFP 1227 is due on Friday, October 3, 2025 by 5:00 PM PST, without exception.

For complete RFP details, submission requirements, and a copy of the RFP, visit the Employment & Human Services Department website at: <https://ehsd.org/overview/contracting-opportunities/> under this RFP 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 1227" in the subject line. Questions must be submitted by Thursday, September 11, 2025. All comments and inquiries received will be posted publicly along with the response on September 26, 2025 at: <https://ehsd.org/overview/contracting-opportunities/> under this RFP.



SECTION 2: RFP 1227 TIMELINE

RFP Published	Thursday, September 4, 2025
Question Submittal Period Submit questions to: contractbid@ehsd.cccounty.us	September 4 – September 11, by close of Bidders' Conference
Recommended Bidders' Conference	Thursday, September 11, 2025 10:00 a.m. to 12:00 p.m. PST
Questions and Answers Posted	Friday, September 26, 2025
RFP Proposal Response Submission Due Date	Friday, October 3, 2025 By 5:00 p.m. PST – No Exceptions
EHSD Compliance Review and Evaluation	October 6 – 8, 2025
EHSD Fiscal Review and Evaluation	October 9 – 14, 2025
Economic Opportunity Council (EOC) Review and Evaluation	October 14 – 28, 2025
Award Notification	Wednesday, October 29, 2025
Appeal Period (10 business days)	October 29 – November 11, 2025
Contract Negotiation & Processing	November 2025 – January 2026
Projected Contract(s) Start	March 1, 2026

*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



SECTION 3: REQUEST FOR PROPOSALS INTRODUCTION

3.1 Solicitation

The purpose of this Request for Proposals (RFP) is to identify organizations(s) that have interest, experience, and expertise in providing anti-poverty programs in the specific area(s) of affordable housing/shelter/rental assistance, food security/nutrition, mental health access, and/or employment/living wage jobs.

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. The Community Services Block Grant Act, as amended, 42 U.S.C. §9901 et seq., and 45 Code of Federal Regulations (CFR) Part 96.
2. The California Community Services Block Grant Program, Government Code §12085 et seq., as amended, and Title 22, California Code of Regulations (CCR) §§ 100601-100795.
3. The Single Audit Act, 31 U.S.C. §7301 et seq. and Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards, 2 CFR 200, and 45 CFR Part 75.

This RFP includes a schedule for proposal procedures and deadlines, describes the services required, provides instructions and forms for the preparation and submittal of the proposal, outlines the review process, and contains administrative and program information useful to prospective bidders.

3.2 Qualified Bidders

Eligible Bidders are organizations that on their own have adequate controls and personnel to provide timely comprehensive Community Action programs as defined in **Section 4**. Qualified bidders must demonstrate capacity for collaboration, interagency coordination and attest to their qualifications on Form #2, Statement of Qualifications (see Section 9. REQUIRED FORMS).

3.3 Estimated Funding

EHSD will award a Federal subaward standard contract (or contracts) to selected organization(s). All Contracts will be billable monthly, in arrears. EHSD anticipates awarding multiple two-year contracts to selected organizations. The combined total award will not exceed \$400,000 per twenty-four (24) month period, to fund Community Action projects requested under this RFP. The anticipated contract period is from



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March 1, 2026 through February 28, 2028.

Federal Funds are passed through the California Department of Community Services and Development and are identified as follows:

<i>Federal Award Identification Number (FAIN):</i>	<i>G-16B1CACOSR</i>
<i>Subaward Period of Performance:</i>	<i>3/1/2026 to 2/28/2028</i>
<i>Catalog of Federal Domestic Assistance Number (CFDA):</i>	<i>93.569</i>
<i>Program Title:</i>	<i>Community Services Block Grant (CSBG)</i>
<i>Agency:</i>	<i>Department of Health and Human Services</i>
<i>Office:</i>	<i>Administration for Children and Families</i>

Funding consists of federal Community Services Block Grant funds. EHSD will administer these funds.

3.4 Questions and Comments

Potential Bidders may pose questions about the RFP process or content by submitting questions to EHSD.

Questions about RFP content must be submitted via email to contractbid@ehsd.cccounty.us by the “**Questions Submittal Period**” date referenced in **Section 2, RFP 1227 Timeline**. Responses to questions will be posted on the EHSD website at <https://ehsd.org/overview/contracting-opportunities/> under this RFP by the date referenced in **Section 2, RFP 1227 Timeline**.

Upon conclusion of the “Question Submittal Period” referenced in **Section 2, RFP 1227 Timeline**, only RFP *process* related questions will be accepted and can be sent via email to contractbid@ehsd.cccounty.us. Emails should include “RFP 1227” in the subject line.

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 Economic Opportunity Council (EOC), except as specified 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 EOC 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 employees, agents, or contractors involved in or connected with this RFP process.



3.6 Right to Amend or Cancel

EHSD reserves the right to delay, amend, or cancel all or any part of this RFP at any time without prior notice. EHSD also reserves the right to modify the RFP process and timeline as is deemed necessary. This RFP does not commit EHSD to accept any proposal, nor is EHSD responsible for any costs incurred by Bidders in the preparation of responses to this RFP.

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 EHSD and the EOC.

3.7 Restriction and Disclosure

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 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 evaluation and selection process has been completed. Bidders should be aware that EHSD 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 EHSD receives a request for information previously marked and identified by Bidder as confidential or proprietary. If EHSD receives a request for release of such previously marked and identified confidential or proprietary information, EHSD will notify Bidder of such request to allow Bidder to challenge such request consistent with applicable law.



SECTION 4: PROGRAM DESCRIPTION

4.1 General

EHSD's Community Services Bureau (CSB) serves as the federally designated Community Action Agency for Contra Costa County. CSB is part of the national Community Action Partnership (CAP) network of over 1,100 agencies that work to alleviate poverty and empower low-income families in communities throughout the United States. CAP is a public organization established under the Economic Opportunity Act of 1964. The Federal Department of Health and Human Services administers the Community Services Block Grant (CSBG) program funds which are then allocated annually to participating CSBG states. The CSBG administrator for California is the California Department of Community Services and Development (CSD). CSD distributes allocations within the state to the existing network of Community Action Agencies and additional community partners, which includes EHSD.

The Contra Costa County EOC, the tri-partite board responsible for overseeing the use of the Community Services Block Grant Funding, has conducted community listening sessions, consulted a county-wide 2025 Community Needs Assessment, and held public hearings to inform the development of the 2026-27 Community Action Plan as mandated by the federal government. This plan established priorities for the agency's use in funding organizations that work to ameliorate poverty. The Community Action Plan is available at <https://ehsd.org/wp-content/uploads/2025/05/2026-2027-Community-Action-Plan.pdf>.

The focus areas for this RFP are to support **Affordable Housing-Shelter-Rental Assistance** (preventing homelessness, supporting safe and affordable housing to low income families/youth), **Food Security-Nutrition** (reducing hunger, promoting healthy eating, improve access and availability of emergency healthy, fresh produce to our underserved population), **Mental Health Access** (mental health services, medical assistance and improving overall well-being through a more effective and efficient use of resources) and **Employment-Living Wage Jobs** (job training and/or placement, job readiness skills and/or development for living wage jobs). The Contra Costa 2026-2027 Community Action Plan is available at <https://ehsd.org/wp-content/uploads/2025/05/2026-2027-Community-Action-Plan.pdf>.

4.2 Purpose and Scope of Work

The intent of this RFP is to invite community-based organizations to submit a Proposal describing a program or project to address locally identified needs in low-income communities in at least one (1) of the following priority areas:

- **Affordable Housing-Shelter-Rental Assistance** (preventing homelessness, supporting safe and affordable housing to low-income families/youth/adults).



- **Food Security-Nutrition** (reducing hunger and food insecurity, promoting healthy eating, improve access and availability of emergency healthy, fresh produce to our underserved population).
- **Mental Health Access** (mental health services, medical assistance and improving health outcomes and overall well-being through a more effective and efficient use of resources).
- **Employment-Living Wage Jobs** (job training and/or placement, job readiness and/or development for living wage jobs).

Essential functions of the awarded organization will include:

1. Ensuring that adequate outreach is implemented to reach Contra Costa County residents in the proposed services area living at or below 200% of the Federal Poverty Guidelines.
2. Maintaining complete client files for all residents provided with services using Community Services Block Grant funds.
 - a. Files include application, income eligibility documentation, residency verification, and verification of identity.
 - b. NOTE: Legal residency status is not required for CSBG services.
3. Completing intake assessments for all participants that include services provided, entrance date to program, and ongoing assessments or tracking of outcomes.
4. Maintaining documentation of case plans, referrals, and logs of training, workshops or sessions attended to meet case plans.
5. Collecting client demographics such as gender, age, ethnicity, and number in household.
6. Maintain current Excluded Parties List System (EPLS) verification in SAM.gov.

4.3 Reporting Requirements

The successful bidders are expected to complete the following reports:

1. Monthly Fiscal Report: Organization will complete and submit a report on forms provided by CSB and include all reasonable information necessary to



substantiate that expenditures for that month are allowable and allocable, including, but not limited to, timecards, payroll ledgers and invoices.

2. Quarterly Program Status Report: Organization will submit quantifiable data including enrollment, completion, and outcomes to ensure all program objectives are on target to be met in full by the end of the contract term.
3. Annual Report: Organization will submit an Annual Report on a form provided by CSB that includes data on client characteristics and services provided.

4.4 Program Monitoring and Evaluation

EHSD will actively monitor services provided through the contract resulting from this RFP. At a minimum, Contractor will be expected to:

1. Perform all services without material deviation from an agreed-upon Service Plan.
2. Maintain adequate records of service provision to document compliance with Service Plan and complete any forms supplied by EHSD.
3. Host an annual onsite visit with EOC representatives and staff for the purpose of monitoring.
4. Cooperate with the collection of other fiscal/administrative/service data as requested by EHSD.
5. Cooperate with the California Department of Community Services and Development (CSD) when they conduct site visits and desk audits.
6. Conduct agency evaluation, including client satisfaction surveys.
7. Attend all mandatory meetings and trainings.

4.5 Legal Authorities

The following are the legal authorities governing the Community Action Projects funding, 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 Contract.
 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 *subrecipient* shall maintain accounting records for funds received under the terms and conditions of the Contract. These records shall be separate from those for any other funds administered by the *subrecipient*, 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 standards for its fiscal management systems, as stipulated in 45 CFR 75.302.

4.6 Subrecipient Awards and Contractor Responsibilities

If Contractor further passes through federal funds of this subaward, Contractor shall make case-by-case determinations whether each Contract it makes for the disbursement casts the party receiving the funds in the role of a subrecipient or a Contractor. If Contractor deems the party receiving the funds is in the role of a subrecipient, then Contractor agrees to the following:

1. Contractor must include information required by the Code of Federal Regulations (CFR), specifically, 45 CFR Part 75-Uniform Administrative Requirements, Cost Principles and Audit Requirement for HHS Awards (Requirements for pass through entities) in each subrecipient's contract.



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2. Contractor must monitor its subrecipients consistent with the requirements outlined in the Federal rules and applicable sections of the 45 CFR PART 75 – Uniform Administrative Requirements, Cost Principles and Audit Requirement for HHS Awards.
3. Contractor must evaluate each subrecipient's risk of noncompliance to determine the appropriate fiscal monitoring level. Contractor shall monitor the fiscal activities of subrecipient organizations to ensure that the subaward is compliant with applicable Federal statutes and regulations and terms of the subaward. Contractor shall verify that sub recipients are audited as required by Subpart F (Audit Requirements) of 45 CFR PART 75-Uniform Administrative Requirements, Cost Principles and Audit Requirements for HHS Awards.
4. Contractor must retain documentation to prove that determination and monitoring was conducted during the Contract term.
5. County, as a pass-through entity, may request those documents during fiscal monitoring, and Contractor will provide such information and records upon County's request.



SECTION 5: REQUIRED PROPOSAL FORMAT

The bidder requirements in this section are mandatory. The proposal must clearly demonstrate the Bidder's ability to provide the requested services. The RFP provides information regarding the format in which proposals should be submitted, the requirements that must be met to be eligible for consideration, the Bidder's responsibilities, and the documents that must be included. Failure to comply with the required proposal format may deem a proposal as nonresponsive. Contra Costa County reserves the right to waive any nonmaterial variation.

5.1 General Submittal Requirements

Electronic Submission – RFP Proposal Submissions are accepted via EHSD.org website only at <https://ehsd/overview/contracting-opportunities/>.

Submissions **must be separated into two (2) files** - first file for the organization Proposal and the second file for the organization's Financial documents.

- **File #1:** Save as "RFP 1227-*Organization Name*-Proposal". This file must contain agency proposal and all required attachments as specified in the RFP and must be signed by officials authorized to bind the bidder to the provisions of the RFP.
- **File #2:** Save as "RFP 1227-*Organization Name*-Financials". This file must contain all required financial documents as specified in the RFP.

Please select the Submit Bid button at the bottom of the proposal announcement. Complete the required fields on each screen and upload the two (2) files when prompted to do so. Once you hit submit bid, a notification will inform you that your bid has been sent. An email will be sent to the provided email address. **DO NOT** email files to EHSD.

To ensure EHSD has received proper notification of your RFP submission, you must call: (925) 957-5645 and follow the instructions provided after you submit your proposal.

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

Please reference the "RFP Proposal Response Submission Due Date" reflected in Section 2, RFP 1227 Timeline.

Once you have submitted your Proposal you must call 925-957-5645 and follow the instructions provided. This will ensure EHSD has received proper notification of your submission.



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. 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.

Virtual Recommended Bidder's Conference Webinar will be held on **Thursday, September 11, 2025, 10:00 a.m. – 12:00 p.m. PST**. Attendance is highly encouraged but not mandatory. Webinar registration is required prior to being admitted to join the Bidder's Conference. To register, please visit <https://attendee.gotowebinar.com/register/8920179955916913759>

Proposals and required attachments must be submitted as specified and must be signed by officials authorized to bind the bidder to the provisions of the RFP.

A proposal may be withdrawn in person by a Bidder's authorized representative prior to the RFP Proposal Response due date as reflected in **Section 2, RFP 1227 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 withdrawal of the proposal.

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.

Proposals received are considered the property of EHSD and will not be returned.

All costs of proposal preparation shall be borne by the bidder. EHSD 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.



5.2 Formatting Requirements

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

EHSD supports electronic submission of proposals as previously referenced. Each bidder must submit **one proposal package with all attachments** included, unless otherwise noted.

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.

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.

5.3 Required Documents

Required forms as reflected in the Proposal Checklist 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 Submission Checklist and numbered sequentially** (excluding the Fiscal Attachments). Electronic templates are posted on the EHSD website under this RFP at <https://ehsd.org/overview/contracting-opportunities/>.

5.4 Proposal Outline and Content

Assemble and arrange each proposal in the order reflected on the Proposal Submission Checklist and address the 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 criteria to assure adherence and responsiveness to scoring requirements.

5.4.1 **Proposal Cover Statement (Form #1)**

This must be the first page of the Proposal. Complete the Proposal Cover Statement Form (**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.



5.4.2 Table of Contents

Proposal must include a Table of Contents that clearly identifies each section of the proposal. The Proposal Checklist may serve as the Table of Contents with the addition of proposal page numbers.

5.4.3 Program Proposal Narrative

Maximum of **twenty (20) Pages**, excluding Proposal Cover Statement, Table of Contents, Attachments, Budget, and Financial Information.

5.4.3.1 Organization and Project Overview

What are the Organization's vision, mission, and objectives?

Primary program components, services, and years of operation, including number of years providing services in the target area.

Primary populations served.

Areas of the county where the proposed services are provided and project name.

5.4.3.2 Program Budget Information

Provide a narrative that includes:

1. Amount of CSBG funds requested (not to exceed \$200,000 annually or \$400,000 for two-years);
2. Total CSBG project cost (should match budget);
3. Itemized two (2) year CSBG project budget using **Form #5** (excel spreadsheet); and
4. Leveraging – describe how you leverage other funds to provide the services you are proposing to fund.

5.4.3.3 Project Description

Provide a narrative that includes:

1. Priority Area(s) to be addressed [Affordable Housing/Shelter/Rental Assistance and/or Food Insecurity/Nutrition and/or Mental Health Access and/or Employment/Living Wage Jobs].



2. Goal Statement – Use **Form #7** (see example in Appendix 10.3).
3. Project objective(s). Description of what will be achieved, including specific measurable action-oriented, realistic and time-bound steps that demonstrate how goals will be obtained. Include National Performance Indicators (NPIs) in Appendix 10.2 relative to the priority area(s) you wish to address along with other performance indicators or metrics related to your program proposal. In your submission, please use **Form #7, Goal and Objectives Worksheet**.
4. Access and Integration. How will you demonstrate your efforts to ensure clients have fair and consistent connections to services? How will you reduce/eliminate barriers to service? How will you integrate services so that individuals are served holistically?
5. Sustainability Plan-what steps will you take if funding is reduced/eliminated?
6. How will your program partner with existing organizations to amplify your services and avoid any unnecessary duplication?

5.4.4 Fiscal Management Narrative (1 page, plus Form #3)

Provide a brief description of the accounting system and internal controls. Include the following as appropriate:

1. Overall system (accrual, double-entry, automated or manual)
2. Timekeeping system
3. Inventory system
4. Payroll system
5. Cost allocation plan and methodology
6. Ledger system for receivables, payables, expenses, disbursements, petty cash

Explain how the organization's fiscal system is administered and by whom. Include responsibilities of Board of Directors, Executive Director and staff in fiscal management. Describe experience and qualifications of fiscal staff.

Complete and attach **Form #3, Board of Directors**.



Describe fiscal procedures and policies or attach a manual of fiscal procedures and policies in the “**Fiscal Addendums**” section referenced in the Proposal Checklist.

Submit one (1) copy of current Organization Operating Budget with revenues and expenses indicated.

5.4.4.1 Program Budget and Budget Narrative (unlimited pages)

Complete a two (2) year line-item budget for all programs, showing all costs. Budget is to be completed using **Form #5: Budget and Budget Narrative**.

Each budget cost item must be detailed in the budget narrative section in Form #5 and should reflect the basis for the computations. Every item must be completed if applicable. Minimal narrative requirements are described below:

Describe the following budget rationale and calculations for Administration and Support:

1. Include supervisors, directors, clerical support staff, and administrative staff with no service delivery responsibilities. Divide the salaries of staff with both “Service delivery” and “Administration” responsibilities in proportion to the time allotted for each activity. List such staff in both categories. Indicate titles, rate of pay, time allotted to program and FTE’s. Indirect costs may not exceed fifteen percent (15%) of total request.
2. Program Staff – Include all staff involved in service delivery. Indicate titles, rate of pay, time allotted to program and FTE’s.
3. Payroll Fringe Benefits – Report estimated costs of benefits, vacations, sick leave, and training days on the line-item budget. Narrative to include description and list of benefits.

Describe the following budget rationale and calculations for Operations:

1. Occupancy - Describe all applicable factors (e.g., rent/leases) and basis for allocating cost to program.
2. Utilities – Describe all applicable factors and basis for allocating cost to program.
3. Telephone, Postage, Insurance, Equipment – list by type, justification of cost and basis for allocating cost to program.
4. Printing/Photocopying – List cost by type and describe justification for cost and basis for allocating costs to program.



5. Materials – List by type and describe justification of cost.
6. Travel – Describe type, justification, and basis of cost. Include service delivery, administration mileage and transportation costs for clients.
7. Miscellaneous – Indicate kinds of anticipated miscellaneous costs.

Note awarded Bidder(s) may be subject to County Budget Templates upon contract award.

5.4.5 Addendums

See Proposal Checklist in **Section 8** for complete list of Attachments.

5.4.6 Fiscal Addendums

Submit one (1) copy of the organization's most recent audit including any applicable corrective action plans, in the "**Fiscal Addendums**" section referenced in the Proposal Checklist.

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. Bidders who currently do not have audited financial statements must provide a certified letter stating that a financial statement audit will be performed during the period of performance should the bidder be awarded the contract.

See **Section 8: Proposal Checklist** for complete list of Fiscal Addendums.



SECTION 6: EVALUATION PROCESS AND CONTRACT AWARD

6.1 Evaluation Process

All proposals complete three (3) stages of evaluation: Compliance Review, Fiscal Review, and EOC Review. Proposals will be stored in a designated secure location to ensure confidentiality. No proposals will be opened until after the submission deadline identified in the RFP. The proposal evaluation stages are as follows:

6.2 Compliance Review

Compliance Review will be performed by the 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.

6.3 Fiscal Review

Proposals that pass the Compliance Review, as referenced above, will be submitted for review by EHSD Fiscal Staff. Proposals must receive a fiscal review evaluation score of at least **seventy percent (70%)** of the total available 100 points, if not, it will be eliminated from further review.

Proposals that do not provide the required audit or financial statements as outlined in **Section 5, Required Proposal Format**, will be determined nonresponsive and will not be considered for funding.

Points will be awarded based on the organization's demonstration of:

- Organization solvency;
- Adequate organization accounting systems and internal controls;
- Ability to administer financial system(s); and
- Compliance with budget specifications.

EHSD Fiscal will review the required audit or audited financial statement included with each proposal. The audit or audited financial statement must be the most recent available.



6.4 Economic Opportunity Council (EOC) Review

RFP Proposals that successfully complete the Contracts Compliance Review and the Fiscal Review (referenced above) will be submitted for EOC Review. The EOC will review all proposals then evaluate and score all service and budget elements per the Scoring Methodology/Rating Sheet and program service delivery requirements included in this RFP.

EHSD and the EOC Review Committee may make on-site visits and use other information available before making final recommendations.

The EOC is comprised of elected representatives from three (3) sectors: Public, Private/Non-Profit, and Low Income. Members of the EOC will be required to sign an impartiality statement.

6.5 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 seventy (70) points from the EOC Review Committee are unlikely to be considered for funding.**

Project Overview - 15 points maximum	Score
1. Description of the organization including mission statement, types of services provided, and client demographics is clear and aligned with the high priority areas and needs identified in the Community Action Plan.	
2. Proposal demonstrates proven success at providing high quality services and has proven performance in working effectively with low-income, program eligible participants or similar populations identified in the Letter of Interest.	
3. Proposed project has a realistic and detailed implementation plan for providing services.	
Total	
Program Budget, Narrative and Capacity Information - 20 points maximum	Score
1. Proposal clearly identifies and justifies the amount of CSBG funds requested.	
2. Total project cost is reasonable and includes an explanation of how full funding will be achieved.	
3. Itemized project budget and budget narrative is realistic and based on sound fiscal practice.	
4. Organization demonstrates overall organizational capacity to leverage and operate the program with guidance of a qualified and diversified board to raise funds, secure grants, and implement a sustainability plan in uncertain times.	
Total	



Project Description - 25 points maximum	Score
1. Priority Area(s) and National Performance Indicator(s) (NPIs) to be addressed by the project are clearly identified with qualitative and quantitative milestones.	
2. Project description outlined in the Proposal including types of services to be provided and client demographics are expressed clearly with references containing detail, number and integration.	
3. Project Objective(s) are clearly identified and aligned with Specific, Measureable, Action-Oriented, Realistic, and Time-bound (SMART) goals.	
4. Sustainability Plan-what reasonable and actionable steps will the organization take if funding is reduced/eliminated?	
5. Proposal describes what outcomes will be achieved to address an identified need with explanation of how agency will partner with existing agencies to avoid duplication and maximize efficiency.	
Total	
Outcome Goals and Objectives - 30 points maximum	Score
1. Outcome statement clearly identifies community issue(s) being addressed.	
2. Documentation supports and describes the scope and scale of the community issue(s).	
3. Outcomes of programs and services described align with desired outcomes in the Community Action Plan.	
4. Outcome goals and objectives are (SMART) and are based on tested and validated best practices.	
5. Action plan is clear, concise and demonstrates how SMART steps are tracked and used to improve client and program outcomes.	
6. Project explains how low-income community members and clients participate in the project design.	
Total	
Proven Track Record of Proposed Services - 10 points maximum	Score
1. Qualifications of current knowledge and experience substantiated by letters and awards, client testimonials, etc., demonstrate the organization has a proven track record for providing high quality service delivery and outcomes. (List summary of documentation below)**	
**Please note that the max score for this question is 10 points	
Total	
Total available points	100



6.6 Appeals Process

Only bidders submitting 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.**

All bidders will receive a written and emailed notification from EHSD informing them of the funding decisions. If a bidder wishes to appeal the selection or award decision, the bidder must submit a written appeal request.

All written letters of appeal must state the following:

- The issue(s) appealed;
- How the alleged issue detrimentally effects the appellant; and
- The rectification sought by the appellant.

An appeal will only be considered valid if there has been a violation of one (1) 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 to:

**EHSD Director
Contra Costa County
Employment and Human Services Department
40 Douglas Drive
Martinez, CA 94553**
or via email to: 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.



6.7 Contract Award and Negotiations

The successful bidders 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.

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 the contractor prior to the effective date of any contract.

Selected contractors will be responsible for all services offered in their RFP proposal, whether or not contractors perform them directly or through subcontractors in multiple organization 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.

The contracting organization(s) receiving funding awarded under this RFP will be responsible for adhering to the then current and applicable County health orders and associated policies.

6.8 Contract Terms and Litigation Warranty

EHSD will negotiate contract terms and agreements with the successful Bidders. Satisfactory performance and delivery of services are conditions of contract renewal. The total overall contract term for services under this RFP is not to exceed a total of two (2) years, depending upon funding availability.

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.



SECTION 7: CONTRACTING REQUIREMENTS

7.1 County Contract Requirements

Upon acceptance of a proposal and award of a contract by the Board of Supervisors, the successful bidder(s) will enter into a standard County contract that specifies:

Parties to the Contract

Effective Dates

Legal Type

Signatories to the Contract

Service Specifications and Provisions for Reporting, Monitoring, and Evaluation

Fiscal Provisions Method of payment to contractor. Either a fee-for-services contract or a cost reimbursement contract may be negotiated with the bidder at County's option, subject to the then current County Budget Template.

Program budget segregated into personnel and operating costs, indirect costs and revenue (if any) to allow determination of reasonableness and feasibility of line item allocation.

Provisions for audit

General Conditions Contractors must comply with standard County Contract General Conditions included in this RFP in Appendix 10.1.

Special Conditions, as required. Contractors may have to satisfy additional insurance requirements prior to contract effective date. No contractor will be reimbursed for service until insurance requirements are met.

7.2 Additional Requirements

As applicable, Contractor must submit the required audit as specified in Appendix 10.1, General Conditions, Paragraph 27. Required Audit.

- If a consortium of organizations is submitting a proposal, a lead agency must be responsible for overseeing and monitoring its partners. The lead agency must act as the cognizant fiscal agent for the other partners. Partners must have similar budget requests for similar items. All other service providers requesting funding under the proposal will be required to subcontract with the lead agency.



- All equipment requests will be evaluated for their necessity and reasonableness in carrying out the program. All equipment requests must explain in detail how the equipment will be used in the performance of services.
- Budgets submitted in response to the RFP will be negotiated on a line item basis. Line items will be examined for reasonableness and necessity in providing services.
- Cost reports shall be fully supported by accounting documentation. Salary and benefit costs allocated to this program shall be supported by detailed time sheets. The grantee must maintain adequate payroll documentation (detailed time sheets sometimes called "functional time sheets") to support compensation paid to bona fide employees. Reimbursement of salary and benefit costs must be based on actual time spent on the program.

7.3 Type of Contract

Contracts will be on a cost reimbursement basis with monthly billing required. Contractor is required to provide detailed line-item budgets. All costs reported on monthly and final cost statements shall be supported by appropriate accounting documentation. The documentation shall establish that EHSD is charged a fair and equitable portion of any indirect or shared costs attributable to services performed under this contract.

7.4 Discrimination and Confidentiality

Discrimination: A Contractor awarded funds under this RFP shall not discriminate against any employee or applicant for employment because of race, sex, gender, age, religion, creed, national origin, ancestry, color, ethnic group identification, gender identity, gender expression, disability (mental or physical), political affiliation, sexual orientation, marital status, medical condition (including pregnancy, childbirth, breastfeeding or related medical conditions), or genetic information. This includes, but is not limited to the following: employment, upgrading or promotion, demotion, or transfer, recruitment advertising, layoff or termination, rates of pay or form of compensation, and selection for training, including apprenticeship. The Contractor shall not, in connection with the employment, advancement, or discharge of employees, discriminate against them because of their age, except upon the basis of a bona fide occupational requirement or retirement plan, or statutory regulation.

Confidentiality: Contractor shall use any client information provided by EHSD or by the client, only for the purpose of administering the program. The improper use or disclosure of confidential case information for any other purpose is a misdemeanor under California Welfare & Institutions Code Section 10850. Contractor shall inform all of their employees of the requirements concerning Confidentiality in the handling of client information. EHSD may take further steps to ensure Contractors' awareness of the provisions of California



Welfare and Institutions Code Section 10850, and may require that Contractor have employees sign acknowledgment of their understanding of said statute and its provisions.

Any Contractor awarded funds under this RFP must maintain all information gathered pertaining to program clients in a secure environment in order to ensure the client's right to confidentiality. The Contractor will not release such information to any Third Party who is not directly responsible for management of the client's services, without the prior written consent of the client.

7.5 Monitoring, Reporting and Record Keeping

Monitoring: County, state, or federal staff may conduct routine monitoring of all programs. Representatives of EHSD, the State of California, Department of Health and Human Services or contractors of these units of government, and others who have a direct concern in administration of this funding may visit the contractor selected for this program at any time. All agency records must be available for inspection. All areas of the project will be subject to examination, which may include, but not be limited to, inspection of clients' case files, attendance records, and financial and bookkeeping records. Clients may be interviewed to verify eligibility, ensure required procedures are being followed, and to ensure provision of adequate services as prescribed by contract. In addition, monitoring may include interviews with employers, supervisors, instructors, and staff of organizations partnering with the contractor to ensure provision of agreed-upon services. In the event that contract requirements are not met, termination of contract may be considered after all other corrective action fails to improve grantee's compliance with contract requirements or performance goals. EHSD will conduct financial monitoring reviews of all subrecipients.

Reporting: Contractor awarded funds under this RFP shall be responsible for submitting accurate management information reports and forms on time and in the manner prescribed by the EHSD and will coordinate with the EHSD designated staff. Contractor will ensure that fiscal claims are submitted in entirety and the manner prescribed by the EHSD Fiscal Officer. Contractor shall receive reimbursement for costs by submitting monthly cost statements together with a request for payment by the tenth day of the following month.

Contractor will be required to provide additional reports as designated in **Section 4 Program Description** and agreed upon in the resulting contract.

Record Keeping: Contractor will be expected to maintain complete up-to-date and accurate records and management controls. Complete any required State data collection forms as supplied by EHSD. Maintain adequate records of service provision to document compliance with service plan and information on the performance outcomes stated in this RFP.



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Contractor will be expected to maintain complete fiscal and accounting records, including, but not limited to, backup documentation to the contract budget, and demonstration of acceptable accounting methods to disburse costs.



SECTION 8: PROPOSAL CHECKLIST

All items listed below shall be completed and included in the 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: [Save as "RFP1227"-*Organization Name*-Proposal"]

- ☐ **Proposal Cover Statement (Form #1)**
- ☐ **Table of Contents**
- ☐ **Program Proposal Narrative (20-page max)**
 - ☐ Organization and Project Overview
 - ☐ Program Budget Information
 - ☐ Project Description
 - ☐ Contract Requirements
- ☐ **Program Addendums**
 - ☐ **Statement of Qualifications (Form #2)** with original signatures must accompany original proposal, completed and signed by Organization Executive Director and President of Organization Board of Directors.
 - ☐ **Monitoring/Performance Report or Letter of Recommendation**
 - ☐ **Organizational Charts**
 - ☐ **Job Descriptions and/or Resumes of Executive Director and Key Program and Fiscal Staff**
 - ☐ **Organization Brochure (as available)**
 - ☐ **Contracts and Grants Form (Form #4)**
 - ☐ **Conflict of Interest Form (Form #6)**
 - ☐ **Goal and Objectives Worksheet (Form #7)**



File #2 Fiscal File: [Save as "RFP1227-Organization Name-Financials"]

- ☐ **Fiscal Management Narrative**
- ☐ **Board of Directors Form (Form #3)**
- ☐ **Program Budget and Budget Narrative (Form #5)**
- ☐ **Fiscal Addendums**
 - ☐ **1** copy of bidder's IRS 501(c)(3) determination letter attached to original proposal copy (if organization is a non-profit organization).
 - ☐ **1** copy of bidder's manual of fiscal procedures and policies, if available, attached to original proposal copy (reference Section 5.4).
 - ☐ **1** copy of bidder's last audited financial statement attached to original proposal copy. (Reference Section 5 for alternate submission requirements if audited financial statements are not available).
 - ☐ **1** copy of current Organization Budget with revenues and expenses indicated.



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	Contracts and Grants
9.5	#5	Budget and Budget Narrative Form
9.6	#6	Conflict of Interest Form
9.7	#7	Goal and Objectives Worksheet



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9.1 FORM #1: Proposal Cover Statement

This form must accompany the proposal package when submitted. Only one copy with original signatures is required.

PROPOSAL COVER STATEMENT – RFP #1227	
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 and SERVICE CATEGORY	
COLLABORATIVE PARTNERS/SUBCONTRACTORS (If applicable)	
AMOUNT OF FUNDING REQUEST TOTAL AMOUNT REQUESTED FOR TWO (2) YEARS \$ _____	
FEDERAL EMPLOYER NUMBER	501(C)(3) EXEMPTION _____
ORGANIZATION/AGENCY PRIOR YEAR NET OPERATING BUDGET \$ _____	
AUTHORIZATION <i>We submit the attached response to the Notice of Request for Proposal #1227 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>	
AUTHORIZED REPRESENTATIVES: (two signatures required)	
Name: _____	Title: Executive Director
Signature: _____	Date: _____
Name: _____	Title: Board President
Signature: _____	Date: _____



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 (2) references, one each in the areas of financial/administrative management and social service delivery to substantiate experience and qualifications.



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.



9.3 FORM #3: Board of Directors

1. Number of Board members required by the organization'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: _____



9.4 FORM #4: Contracts and Grants

1. List current contracts and subcontracts including government contracts and/or grants:

<u>Contact Name/Phone # of Contractor/Grantor</u>	<u>Services Provided Under Contract</u>	<u>Contract Dates</u>
-------------------------------------------------------	---------------------------------------------	---------------------------

2. List key contracts/grants completed in the last five years, including government contracts/grants:

3. Bidder agrees to allow County to contact contractors for information relative to Bidder's performance. **Sign below.**

Name and Title
(Executive Director or Board President)

Date

Name and Title
(Executive Director or Board President)

Date



9.5 FORM #5: Budget and Budget Narrative Form

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 REIMBURSEMENT AMOUNT	BUDGET NARRATIVE
PERSONNEL AND FRINGE BENEFITS	\$ -	
OPERATING COSTS	\$ -	
OTHER COSTS	\$ -	
PARTICIPANT COSTS	\$ -	
INDIRECT OVERHEAD AND/OR ADMINISTRATIVE COSTS	\$ -	
COST REIMBURSEMENT AMOUNT	\$ -	
Cost Reimbursement Amount	\$ -	
Total Budget	\$ -	
BUDGET AMOUNTS FROM CELLS B6 & B7	-	
MUST BE ZERO	-	



9.6 FORM #6: Conflict of Interest Form

CONFLICT OF INTEREST FORM

The below noted member of the board of directors and executive director of the noted agency hereby certifies (please check one):

- ☐ There is NO conflict of interest with the Contra Costa County Economic Opportunity Council. We attest that, to the best of our knowledge, no board member or staff have any direct or indirect interest with any member of the Contra Costa County Economic Opportunity Council that would prevent the exercise of fair and impartial judgment in our proposal evaluation. A conflict of interest is a transaction or arrangement that might benefit the private interest of an officer, board member, or employee.
- ☐ There IS conflict of interest with the Contra Costa County Economic Opportunity Council and we request that arrangements be made to mitigate any circumstances that would prevent the exercise of fair and impartial judgment in our proposal evaluation. A conflict of interest is a transaction or arrangement that might benefit the private interest of an officer, board member, or employee. The following individual(s) is/are staff or board members of our agency:

We also understand that all proposals and their contents are considered confidential information and may not be distributed. This form shall be returned to the Employment and Human Services Department, Contracts and Grants Unit, 40 Douglas Drive, Martinez, CA 94553. Upon awarding of any contract, the proposals, with some limitations, may become public information.

Signature of Board Member

Date

Print name

Title / Position / Agency

Signature of Executive Director (or designee)

Date

Print name

Title / Position / Agency



9.7 FORM #7: Goal and Objectives Worksheet

GOAL: Please state your goal in the box below. Choose one of the three priority areas and formulate a goal that describes how your program/project will impact the priority area.		
OBJECTIVES	METRICS – Quantifiable Results (Use NPIs in Section 9.7 INSTRUCTION FOR FORM #7)	TIMEFRAME (When will you complete task?)



FORM # 7 Goal and Objectives Worksheet Instructions

NATIONAL PERFORMANCE INDICATORS

Use **one or more** of the below questions to develop each goal and objective in your RFP response.

Housing - Shelter

1. How many clients obtained and/or maintained safe and affordable housing?
2. How many clients have you assisted with Emergency Temporary Shelter?
3. How many clients have you assisted with Emergency Home Repairs (i.e., structural appliances, heating systems, etc.)?
4. How many clients have you assisted with Emergency Rent or Mortgage Assistance?
5. How many clients purchased their own home in their community?
6. What is the number of Housing Consortia/Collaboration, both public and private your organization/agency actively works with?
7. How many safe and affordable housing units in the community will be preserved or improved through the partnership with Contra Costa County Employment and Human Services Department Community Services Bureau?

Food - Nutrition

1. How many clients has your organization/agency assisted in obtaining food assistance?
2. How many clients have you assisted with emergency food?
3. How many clients in your organization/agency with infants and children have had an improvement on their health and development because of adequate nutrition?

Mental Health Access/Health Services

1. How many clients demonstrated improved mental and behavioral health and well-being?
2. How many clients obtained health care services for themselves and/or family members?
3. How many clients had access to safe and affordable health care services/facilities?
4. How many clients received Emergency Medical Care?
5. How many clients had access to reliable transportation and/or driver's license?
6. How many clients received Emergency Protection from Violence?
7. How many youths improved their health and physical development?
8. How many youths improved their social/emotional development?

Employment - Training

1. How many clients who are unemployed have obtained a job after visiting your organization/agency?
 - A. Out of those clients, how many have maintained a job for at least ninety (90) days?



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- B. Out of those clients employed, how many have obtained an increase in employment income and/or benefits?
2. How many clients have achieved “living wage” employment and/or benefits?
 3. How many clients have obtained skills/competencies required for employment?
 4. How many clients have completed ABE/GED and received a certificate or diploma?
 5. How many clients have completed post-secondary education program and obtained a certificate or diploma?
 6. How many accessible or increased educational and training placement opportunities, or those that are saved from reduction or elimination that are available for low-income people in the community, including vocational, literacy, and life skill training, ABE/GED, and post-secondary education will be preserved or improved through the partnership with Contra Costa County Employment and Human Services Department Community Services Bureau?
 7. What is the number of Institutions of post-secondary education/training both public and private your organization/agency actively works with?



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



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 \$200,000 annually or \$400,000 for two (2) years, 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 \$200,000 annually, or \$400,000 for two (2) years, 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.



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, 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:

- 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



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 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.



10.2 National Performance Indicators

NATIONAL PERFORMANCE INDICATORS

Use one or more of the below questions to develop each goal and objective in your RFP response.

Housing – Shelter

1. How many clients obtained and/or maintained safe and affordable housing?
2. How many clients have you assisted with Emergency Temporary Shelter?
3. How many clients have you assisted with Emergency Home Repairs (i.e., structural appliances, heating systems, etc.)?
4. How many clients have you assisted with Emergency Rent or Mortgage Assistance?
5. How many clients purchased their own home in their community?
6. What is the number of Housing Consortiums/Collaboration, both public and private your organization/agency actively works with?
7. How many safe and affordable housing units in the community will be preserved or improved through the partnership with Contra Costa County Employment and Human Service Department Community Services Bureau?

Food – Nutrition

1. How many clients has your organization/agency assisted in obtaining food assistance?
2. How many clients have you assisted with emergency food?
3. How many clients in your organization/agency with infants and children have had an improvement on their health and development because of adequate nutrition?

Mental Health Access/Health Services

1. How many clients demonstrated improved mental and behavioral health and well-being?
2. How many clients obtained health care services for themselves and/or family member?
3. How many clients had access to safe and adorable health care services/facilities?
4. How many clients received Emergency Medical Care?
5. How many clients had access to reliable transportation and/or driver's license?
6. How many clients received Emergency Protection from Violence?
7. How many youths improved their health and physical development?
8. How many youths improved their social/emotional development?



Employment – Training

1. How many clients who are unemployed have obtained a job after visiting your organization/agency?
 - A. Out of those clients, how many have maintained a job for at least ninety (90) days?
 - B. Out of those clients employed, how many have obtained an increase in employment income and/or benefits?
2. How many clients have achieved “living wage” employment and/or benefits?
3. How many clients have obtained skills/competencies required for employment?
4. How many clients have completed ABE/GED and received certificate or diploma?
5. How many clients have completed post-secondary education program and obtained certificate or diploma?
6. How many accessible or increased educational and training placement opportunities, or those that are saved from reduction or elimination that are available for low-income people in the community, including vocational, literacy, and life skill training, ABE/GED, and post-secondary education will be preserved or improved through the partnership with Contra Costa County Employment and Human Service Department Community Services Bureau?



10.3 Sample of Completed Goal and Objectives Worksheet Form #7

GOAL: Please state your goal in the box below. Choose one of the three priority areas and formulate a goal that describes how your program/project will impact the priority area.		
Contra Costa Housing Advocacy's goal is to provide access to affordable and safe housing by providing low-income clients assistance with housing, evictions, foreclosure, and housing violations regardless of their location in the county.		
OBJECTIVES	METRICS – Quantifiable Results (Use NPIs in Section 9.7 INSTRUCTION FOR FORM #7)	TIMEFRAME (When will you complete task?)
Provide housing advice and assistance to seventy-five (75) low-income residents which include housing referrals, emergency shelter assistance, eviction requirements and procedures.	Housing - Shelter Priority Areas: Our agency will assist sixty-five (65) low-income clients with emergency shelter in Contra Costa County. Our agency will assist ten (10) low-income clients to maintain safe and affordable housing in Contra Costa County.	We intend on completing these tasks and assisting the projected number of low-income clients stated on our objective by the end of the 2028 CSBG contract.