

REQUEST FOR PROPOSALS



SERVICES FOR OLDER ADULTS AND PERSONS WITH DISABILITIES

RFP Number

2017_AAS_01

Revised 1/11/17

County of San Mateo Health System
Aging and Adult Services

Release Date: January 5, 2017

Responses must be Received
by 5:00 p.m. Pacific Standard Time
on Friday, February 10, 2017

**REQUEST FOR PROPOSALS
FOR
SERVICES FOR OLDER ADULTS AND
PERSONS WITH DISABILITIES**

Interested vendors must register online with the County at
www.publicpurchase.com

Proposals must be submitted electronically to
www.publicpurchase.com

Interested vendors **must submit a letter of intent** with the
electronically submitted proposal.

By 5:00 p.m. Pacific Time on February 10, 2017

PROPOSALS WILL NOT BE ACCEPTED AFTER THIS DATE AND TIME

Note regarding the Public Records Act:

Government Code Sections 6250 *et seq.*, the California Public Records Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Records Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request For Proposals (RFP) is a public record in its entirety. Also, all information submitted in response to this RFP is itself a public record **without exception**. Submission of any materials in response to this RFP constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

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SECTION I – GENERAL INFORMATION

A. STATEMENT OF INTENT

As outlined in more detail in Section II – Scope of Work, the Health System’s Division of Aging and Adult Services (AAS), which is a part of the government of the County of San Mateo, seeks by way of this RFP to obtain the listed services in a manner that maximizes the quality of services while also maximizing value to the County and, by extension, the citizens of the County. Proposers must be able to show that they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type and local availability of the proposer's personnel and equipment resources. The target start date and term for the proposed services is July 2017 through June 2021, subject to negotiation of a final agreement.

B. BACKGROUND

- 1. Description of Funding:** The Older Americans Act (OAA) of 1965, reauthorized in 2016, was created to help older Americans continue to live independently in their homes and communities. The OAA created a multi-level network, consisting of the federal Administration for Community Living (ACL), State Units on Aging, and local Area Agencies on Aging (AAA). These agencies serve as focal points for planning and advocacy on senior issues. Funding for an array of services at the local level is available through the OAA and County General Funds.

The intent of the funding available for all program areas included in this RFP is to improve the quality of life for San Mateo County's diverse population of older adults and persons with disabilities by making services available which assist them to live independently and avoid premature or unnecessary institutionalization.

- 2. Aging and Adult Services (AAS):** San Mateo County AAS is a division of the San Mateo County Health System. The Division provides a wide range of services to assist older adults, persons with disabilities, and dependent adults to live as safely and independently as possible in the community. AAS’s overall goal is to develop an integrated long-term supportive services system for older adults and adults with disabilities that is person-centered and responsive to the individual needs of older adults and adults with disabilities focused on coordinated home and community-based services to maintain individuals in community settings, and flexible in its use of resources, while reducing administrative duplication, complexity and fragmentation. The Division provides direct services which include centralized intake and referral, assessment and consultation, protective and supportive services, community based services, and case management. The programs that provide these services include:
 - Information and Referral TIES Line
 - 24-Hour Response Team
 - Adult Protective Services (APS)
 - Case Management Programs – Multipurpose Senior Services Program (MSSP), Coordinated Care Initiative (CCI)

- Community Based Programs
- Elder and Dependent Adult Protection Team (EDAPT)
- In-Home Supportive Services (IHSS)
- Representative Payee
- Public Administrator
- Public Authority
- Public Guardian

3. **Area Agency on Aging:** The OAA of 1965 was created to help older Americans continue to live independently in their homes and communities. The OAA created a multi-level network, consisting of the ACL, State Units on Aging (the California Department of Aging (CDA), and local Area Agencies on Aging (AAA). In San Mateo County, AAS serves as the AAA. As the local AAA, AAS serves as a focal point for advocacy, planning, coordination and development of comprehensive community-based service systems for older adults. AAS also administers OAA, State, and county funding for services at the local level.

In San Mateo County, the County Board of Supervisors has been designated as the AAA governing body. AAS provides the administrative functions, including staff support to carry out the broad mandates of the OAA. AAS provides some OAA services directly and also purchases services through agreements with incorporated private nonprofit agencies, profit-making organizations, or public entities.

The 17-member San Mateo County Commission on Aging (CoA) serves as the advisory body to the Board of Supervisors and AAS. In compliance with the OAA and the Older Californians Act (OCA), it also serves as the mandated advisory council, for the AAA in San Mateo County, reviewing allocation of OAA funds, program performance, making recommendations regarding funding and program development and helping to design a community-based service system. Also instrumental in the development and implementation of the community-based system of care is the Commission on Disabilities (CoD), a 21-member advisory group regarding disability issues.

The New Beginning Coalition, a broad-based group of service providers, consumers, commissioners, and other interested parties was created to provide guidance on the development and implementation of the AAA's Area Plan (Plan) for older adults in San Mateo County which is generally submitted to the CDA every four years and is updated on an annual basis.

For San Mateo County, the Plan serves as a comprehensive plan to address the needs and issues of not only older adults but persons with disabilities in the County. Along with the OAA, the Plan acts as the guide for service delivery described in this RFP. Applicants for funding described in this RFP will be asked to respond to critical elements of the Plan as they design services to match the identified needs of older adults and adults with disabilities in San Mateo County. A copy of the Plan is available online at: http://www.smchealth.org/sites/main/files/area_plan_06_03_16_draft_web_0.pdf

4. Community Service Areas (CSA): The County’s system of care provides a coordinated continuum of protective, supportive, preventive, and advocacy services. In an effort to ensure that all older adults and persons with disabilities throughout San Mateo County have access to the continuum, the County has been divided into four community service areas each containing a broad range of services. Each community service area has a unique geographic and demographic makeup as well as unique needs that require a specific mix of services. The determination of community service areas is based on the following criteria:

- Geographic boundaries and identified barriers;
- Ethnic and cultural areas;
- Population density;
- Transportation accessibility; and
- Identified areas where the community looks for services
 - ❖ Commerce centers
 - ❖ Professional service centers
 - ❖ Existing focal points for services

The following list identifies the cities located within each community service area:

COMMUNITY SERVICE AREA I (NORTH COUNTY)

Daly City	Pacifica	South San Francisco
Colma	Brisbane	San Bruno

COMMUNITY SERVICE AREA II (CENTRAL COUNTY)

Millbrae	Burlingame	Hillsborough
San Mateo	Foster City	

COMMUNITY SERVICE AREA III (SOUTH COUNTY)

Belmont	San Carlos	Redwood City
Woodside	Atherton	Menlo Park
Portola Valley	East Palo Alto	

COMMUNITY SERVICE AREA IV (COASTSIDE)

Montara	Moss Beach	El Granada
Half Moon Bay	San Gregorio	Loma Mar
Pescadero	La Honda	Princeton-by-the-Sea

5. Eligibility and Target Population

a. Applicant Eligibility:

- Incorporated private nonprofit organizations, profit-making organizations, and public bodies are all eligible to submit applications under this RFP.
- Selection of profit-making (for profit) proposals must be approved

by CDA prior to contract award.

- Applicants must be able to serve clients in San Mateo County.
- b. Client Eligibility: The eligible populations for most programs included in this RFP include older adults (defined as persons aged 60 and above for certain programs and 55 and above for other programs) and persons with disabilities aged 18-59. See individual program standards for client eligibility criteria specific to each program. While applicants are encouraged to serve individuals in need of services who do not fall within the eligibility criteria in this RFP, the cost of those services will not be covered under any agreement arising out of this RFP.
- c. Target Population: The ability to serve individuals within the target populations described below is a major factor in evaluating and recommending proposals for funding. Services to be considered should be targeted to individuals in greatest social and/or economic need. While the categories listed below may not include all eligible individuals, it is the intent of the OAA that services be targeted to individuals with the following characteristics who live either in the community or in long-term care facilities:
- Low income minority older individuals;
 - Older individuals with the greatest economic need (individuals with an income level at or below the poverty line);
 - Older individuals with the greatest social need (those needs caused by non-economic factors):
 - * Physical and mental barriers
 - * Language barriers
 - * Cultural, social or geographic isolation including isolation caused by racial or ethnic status that:
 - Restrict the ability of an individual from performing normal daily tasks or
 - Threatens the capacity of the individual to live independently;
 - Older Native Americans;
 - Isolated, abused, neglected and/or exploited older individuals;
 - At-risk older persons and their caregivers;
 - Older individuals residing in rural areas;
 - Older individuals who have limited English-speaking ability;
 - Older individuals with Alzheimer's disease or related disorders with neurological and organic brain dysfunction and their caregivers;
 - Older individuals with caregiver responsibilities for developmentally disabled children or spouses; and
 - Older individuals who provide uncompensated care to their adult children with disabilities.

C. THE REQUEST FOR PROPOSAL PROCESS

This RFP seeks the submission of proposals to provide services from any and all interested and qualified proposers. The County of San Mateo seeks by way of this RFP to obtain the listed services in a manner that maximizes the quality of services while also maximizing value to the County and, by extension, the citizens of the County. Proposers must present evidence that they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type and local availability of the proposer's personnel and equipment resources.

SECTION II – SCOPE OF WORK

A. DESCRIPTION

Proposers are to utilize the specific Program Workplans in section VII. Fiscal/budgetary requirements are detailed in the Fiscal Budget Standards as well as in the individual Program Standards and Workplans.

Fiscal Requirements:

- Providers shall maintain accounting records for funds received under the terms and conditions of this Agreement. These records shall be separate from those for any other funds administered by the Contractor and shall be maintained in accordance with Generally Accepted Accounting Principles and Procedures and the Office of Management and Budget's Cost Principles;
- Matching funds must be calculated based on total program cost. Program specific match requirements can be found in each program fiscal section;
- Agreement funds must be traceable, and original detailed invoices for all expenditures must be retained for a period of four years or until audit findings are resolved, whichever is greater;
- All required budget forms and instructions are attached in section VIII. Separate budget forms must be completed according to budget instructions and must accompany each program proposal;
- No contract funds shall be used to pay the salary or expenses for anyone that is lobbying.
- The provider must submit monthly invoices based on actual expenses incurred each month. Monthly invoice forms will be available electronically; and
- The provider is responsible for covering the cost of all components of each program outlined above and shall be reimbursed for actual expenditures on the approved budget for each program.

Reporting Requirements:

- Agreement awardees must comply with data collection and reporting

requirements and must be prepared to use a Federal, State, or AAS electronic client data management and reporting system during the term of this RFP;

- All reports are due on the 10th of each month unless otherwise specified in the Program Standards;
- Proposers must agree to administer/use any and all survey instruments as directed by the County including outcomes and satisfaction measurement instruments; and
- Specific reporting requirements for each program can be found in the Program Standards and Workplan.

Additional Definitions

Confidentiality: The confidentiality of all clients shall be protected. No client-related information shall be released by the program without the written consent of the client. All programs are required to be compliant with guidelines set forth in the Health Insurance Portability and Accountability Act (HIPAA) and to complete the annual CDA Security Awareness Training.

Contingency Plan: Applicants must show a contingency plan, indicating the level and type of service that will be provided in the event the full amount requested from AAS is not received.

Continuity of Service: Services must be provided during each month of the fiscal year unless the exception is described in detail in the Program Standards and Workplans and approved by AAS.

Corrective Action: The Corrective Action Policy is in Enclosure 13.

Cultural Relevance: In order to ensure the accessibility and acceptability of services and programs to culturally diverse seniors and adults with disabilities populations throughout the County, providers shall employ staff, recruit volunteers and/or coordinate with appropriate organizations that are knowledgeable about and able to communicate effectively with the communities to be served. Each provider will be required to attend the AAS sponsored Cultural Humility training or provide a similar training that is pre-approved by the Department.

Elder Abuse: Program staff is required to report all suspected cases of abuse or neglect of elders and dependent adults to AAS.

Emergency Preparedness Plans: All Contractors must be prepared to respond to clients and staff in their facilities at the time of a disaster and to develop a plan for the continuation or restoration of services after a disaster. Each contracted agency must have a written Emergency Operations Plan in place that is verifiable during the contract monitoring process. Contractor staff and volunteers should be prepared to activate the plan in a declared emergency. The plan must include information on designated staff who will contact AAS in case of an emergency and report the status of your agency's physical plant, ability to provide services, and

when applicable, client status.

New Beginning Coalition: All contracted providers are encouraged to participate in the Plan-related New Beginning Coalition quarterly meetings and activities held throughout the year.

Quarterly Provider Network Meeting: All contracted providers are required to attend or send a representative to the quarterly Provider Network Meeting.

Quarterly Family Caregiver Collaborative Meeting: All contracted providers of the Family Caregiver Support Program are encouraged to attend or send a representative to the quarterly Family Caregiver Collaborative Meeting.

Quarterly Site Manager's/Home Delivered Meals Collaborative Meeting: All contracted providers of nutrition programs (Congregate and HDM) are required to attend or send a representative to the quarterly Site Manager's/MOW Collaborative Meeting.

B. LENGTH OF AGREEMENT

The anticipated duration of agreements arising out of this RFP process will be for four years, with the term tentatively to begin July 2017 and end June 2021. The selected proposal shall be made a part of the agreement (contract). Contract awards shall be limited to a one-year period. Contracts will likely require inclusion of an allowance for yearly renewals up to three years at the sole option of the County.

SECTION III – GENERAL TERMS AND CONDITIONS

Read all Instructions. Read the entire RFP and all enclosures before preparing your proposal.

Proposal Costs. Costs for developing proposals are entirely the responsibility of the proposer and shall not be charged to the County or otherwise reimbursed by the County.

Proposal Becomes County Property. The RFP and all materials submitted in response to this RFP will become the property of the County.

Questions and Responses Process. Submit all questions relating to this RFP to the designated questions field associated with this RFP at publicpurchase.com.

All questions must be received no later than 4:00 pm PST on January 13, 2017. All questions and responses will be posted to publicpurchase.com.

If changes to the RFP are warranted, they will be posted to the publicpurchase.com website. It is the responsibility of each proposer to check the website for changes and/or

clarifications to the RFP prior to submitting a response. A proposer's failure to do so will not provide a ground for protest.

Proposer Information Conference. All interested parties are invited to participate in a non-mandatory informational session that will be held as follows:

Tuesday, January 10, 2017
900 – 11:00 am
225 37th Avenue, Room 100
San Mateo, CA 94403

During the Proposer Information Conference, the County may respond to questions received prior to the Conference. The County may choose to provide additional information following the Conference.

Alteration of Terms and Clarifications. No alteration or variation of the terms of this RFP is valid unless made or confirmed in writing by the County. Likewise, oral understandings or agreements not incorporated into the final contract are not binding on the County.

If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the proposer must immediately notify the County of such error in writing and request modification or clarification of the document. If a proposer fails to notify the County of an error in the RFP prior to the date fixed for submission, the proposer shall submit a response at his/her own risk, and if the proposer enters into a contract, the proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

Modifications or clarifications to the RFP will be posted to the publicpurchase.com website as outlined above without divulging the source of the request for same. The County may, at its discretion, also give electronic notice by email to all parties who have notified the County of their electronic contact information in response to this RFP, but no party that fails to receive email notice has any basis for protest given that all clarifications will be available online. It is the obligation of all proposing parties to check the publicpurchase.com website for updates regarding the RFP if they wish to be kept advised of clarifications prior to submitting a proposal.

Selection of Provider(s). The selection of a provider will be memorialized in the form of a "County Agreement with Independent Contractor" (see the enclosed sample of the Standard Contract Template), authorized by a resolution of the County Board of Supervisors and signed by both parties.

The County reserves the right to reject any or all proposals without penalty. The County's waiver of any deviation in the proposal shall in no way modify the RFP documents or excuse the proposer from full compliance with any eventual contract.

Once a provider is selected, the Agreement with that provider must still be negotiated and submitted to the San Mateo County Board of Supervisors for approval, and there is no contractual agreement between the selected provider unless and until the Board of Supervisors accepts and signs the Agreement. Selection of a proposal for negotiation of contract terms and eventual submission to County leadership by way of a proposed Agreement does not constitute an offer, and proposers acknowledge by submission of a proposal that no agreement is final unless and until approved by the Board of Supervisors.

Equal Benefits. Contractor shall comply with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor's employee is of the same or opposite sex as the employee.

Jury Duty. The contractor must comply with the County Ordinance requiring that the contractor have and adhere to a written policy that provides its full-time employees who live in San Mateo County with no fewer than five days of regular pay for actual jury service in San Mateo County. This policy may provide that employees deposit any fees received for such jury service with the contractor or that the contractor deduct from the employee's regular pay the fees received for jury service. See Section 13, Compliance with County Employee Jury Service Ordinance, in the Standard Contract Template enclosure. If the proposer has no employees that qualify for jury duty in San Mateo County, the proposer may satisfy this requirement by providing the County with written confirmation of the fact that (1) it has no such employees and (2) it will comply with the jury service pay ordinance with respect to any future qualifying employees.

Living Wage. Unless subject to a specific exemption under the Ordinance, contractors providing services or goods with services must comply with Chapter 2.88 of the San Mateo County Ordinance Code, which is the County of San Mateo Living Wage Ordinance (LWO). Such compliance includes, but is not limited to, paying all Covered Employees the current Living Wage and providing notice to all Covered Employees and Subcontractors as required under the Ordinance. The Ordinance requires a specific Living Wage be paid to employees working on certain contracts. Please see Chapter 2.88 of the San Mateo County Ordinance Code, a copy of which is included in Enclosure 3 of this RFP, to determine whether your contract is covered by the Ordinance or is exempt.

If the contract is exempt from the LWO OR if the proposer has no covered employees under the Ordinance, the proposer may satisfy this requirement by providing the County with written confirmation of the following, as applicable: (1) that the contract is exempt from the Ordinance or (2) that it has no covered employees and it will comply with the Ordinance with respect to any future qualifying employees.

Insurance. The County has certain insurance requirements that must be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the contractor must carry the statutory limit for workers' compensation insurance; if the contractor or its employees maintain a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and its officers, agents, employees, and servants as additional insured on any such policies (except workers compensation). Depending on the nature of the work being performed, additional requirements may need to be met.

Incomplete Proposals May be Rejected. If a proposer fails to satisfy any of the requirements identified in this RFP, the proposer may be considered non-responsive and the proposal may be rejected.

Contact With County Employees. As of the issuance date of this RFP and continuing until the final date for submission of proposals, all proposers are specifically directed not to hold meetings, conferences, or technical discussions with any County employee for purposes of responding to this RFP except as otherwise permitted by this RFP. Any proposer found to be acting in any way contrary to this directive may be disqualified from entering into any contract that may result from this RFP.

Proposers should submit questions or concerns about the process as stated above. The proposer should not otherwise ask any County employees questions about the RFP or related issues, either orally or by written communication, unless invited to do so.

Group Purchasing Organization Participation. Proposers should keep in mind that the County is a participant in more than one Group Purchasing Organization (GPO), and this RFP is open to those who provide services under a GPO. Proposers should ensure their proposals are as competitive as possible while also providing the highest quality services in order to be considered a viable provider for the listed services. The County reserves the right to use a GPO provider if doing so is in the County's best interest, as determined solely by the County, even if that provider does not submit a proposal in response to this RFP.

Travel Costs. If the services requested will require you or your employees to travel to the Bay Area, and if the County opts to permit travel expenses to be reimbursed, there are some general guidelines regarding reimbursement rates that will apply. In general, the following restrictions should be kept in mind: reimbursement for the actual cost of lodging, meals, and incidental expenses ("LM&I Expenses") is limited to the then-current Continental United States ("CONUS") rate for the location of the work being done (San Mateo/Foster City/Belmont, California), as set forth in the Code of Federal Regulations

and as listed by the website of the U.S. General Services Administration (available online by searching www.gsa.gov for the term 'CONUS'); airline and car rental travel expenses ("Air & Car Expenses") are limited to reasonable rates obtained through a cost-competitive travel service (for example, a travel or car-rental website), with air travel restricted to coach fares and car rental rates restricted to the mid-level size range or below; and certain other reasonable travel expenses ("Other Expenses") such as taxi fares, parking costs, train or subway costs, etc. may be reimbursable on an actual-cost basis. You should not assume that the County will permit travel from the Bay Area to be reimbursed, and your proposal should include such travel costs if applicable. Travel costs should be minimized or eliminated in order for a proposal to be competitive.

Miscellaneous. This RFP is not a commitment or contract of any kind. The County reserves the right to pursue any and/or all ideas generated by this RFP. The County reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interest of the County. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, the County assumes no liability for any unintentional errors or omissions in this document. The County reserves the right to waive or modify any requirements of this RFP when it determines that doing so is in the best interest of the County. Finally, the County may revise or clarify aspects of the required services after proposals are submitted by communicating directly to some or all of the providers that submitted proposals.

SECTION IV – REQUEST FOR PROPOSALS PROCEDURE

This section describes the general RFP procedure used by the County, and the remaining sections of this RFP list detailed requirements.

A. TENTATIVE SCHEDULE OF EVENTS

EVENT	DATE
Release Request for Proposals	January 5, 2017
Proposer's Conference (9:00-11:00 am)	January 10, 2017
Questions Submitted to County Deadline	January 13, 2017
Release Responses to Questions	January 17, 2017
Proposal Deadline	February 10, 2017
Formal Review of Proposals ⁽¹⁾	Feb. 13 – March 17, 2017
Contract Negotiations Begin ⁽¹⁾	March 20, 2017
Protest Deadline ⁽¹⁾	April 3, 2017

⁽¹⁾ Dates are subject to change

B. SUBMISSION OF PROPOSALS

Provider/Service Provider Registration: Providers/service providers interested in responding to this RFP must register online with the County of San Mateo at www.publicpurchase.com. The County will not be held responsible or liable for registration errors.

Cover Letter / Letter of Intent: The CA Dept. of Aging requires that all service providers interested in responding to this RFP must submit a letter of intent on the organization's letterhead with the electronically submitted proposal.

Proposal: The RFP response will be submitted electronically to www.publicpurchase.com by 5:00 p.m. Pacific Standard Time on February 10, 2017.

Additionally, four (4) hard copies of each RFP response shall be submitted by the proposal due date indicated above to:

Audrey Moore-Burdelle, Contracts Administrator II
Aging and Adult Services
801 Gateway Boulevard, Second Floor
South San Francisco, CA 94080

All responses must be received by the stated date and time in order to be considered for award. The County will not be responsible for and may not accept late proposals due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures) of the publicpurchase.com system.

By submitting a proposal, each proposer certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the proposer's capability of rendering the services to be provided. The failure of a proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of the County. The County reserves the sole right to evaluate the contents of proposals submitted in response to this RFP and to select a contractor, if any.

Proposals received late will not be opened or given any consideration for the proposed services unless doing so is deemed to be in the best interest of the County, as determined in the sole discretion of the County.

C. CONFIDENTIALITY OF PROPOSALS

California Government Code Sections 6250 et seq. (the "California Public Records Act" or the "Act") defines a public record as any writing containing information relating to the conduct of the public business. The Act provides that public records shall be disclosed

upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure. The materials submitted in response to this RFP are subject to the California Public Records Act.

Be advised that any contract that eventually arises from this RFP is a public record in its entirety. Also, all information submitted in response to this RFP is itself a public record without exception. Submission of any materials in response to this RFP constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

If the County receives a request for any portion of a document submitted in response to this RFP, the County will not assert any privileges that may exist on behalf of the person or entity submitting the proposal, and the County reserves the right to disclose the requested materials without notice to the party who originally submitted the requested material. To the extent consistent with the Public Records Act and applicable case law interpreting those provisions, the County and/or its officers, agents, and employees retain discretion to release or withhold any information submitted in response to this RFP.

Submission of a proposal constitutes a complete waiver of any claims whatsoever against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal to be inspected.

D. PROPOSAL EVALUATION

All proposals received will be evaluated by an RFP Evaluation Committee. The RFP Program Evaluation Committees will be comprised of a variety of individuals including program experts from the community, advisory committee members, and Health System staff. During the evaluation process, the County may require a proposer's representative to answer specific questions orally and/or in writing. The County may also require a visit to the proposer's offices, other field visits or observations by County representatives, or demonstrations as part of the overall RFP evaluation. Once a finalist or group of finalists is selected, additional interactions or information may be required. The most qualified individual or firm will be recommended by the RFP Evaluation Committee based on the overall strength of each proposal, and the evaluation is not restricted to considerations of any single factor such as cost.

Responses to this RFP must adhere to the format for proposals detailed in Section V - PROPOSAL SUBMISSION REQUIREMENTS. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

- Qualifications and experience of the entity, including capability and experience of key personnel and experience with other public or private agencies to provide these services
- Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
- Customer service
- History of successfully performing services for public or private agencies
- Ability to meet any required timelines or other requirements
- Claims and violations against you or your organization
- Cost to the County for the primary services described by this RFP
- References
- Compliance with County RFP and contractual requirements
- If the proposal is submitted by a current or previous OAA contractor with the County of San Mateo, evaluation of a proposal may include the performance history, contract compliance, timeliness of documentation submission and monitoring reports for said organization

The County may consider any other criteria it deems relevant, and the Evaluation Committee is free to make any recommendations it deems to be in the best interest of the County. Inaccuracy of any information supplied within a proposal or other errors constitute grounds for rejection of the proposal. However, the County may, in its sole discretion, correct errors or contact a proposer for clarification.

Note that the County reserves the right to evaluate proposals solely based on each provider's written submission. In relation to written materials, evaluation will be performed only on the material included directly in the proposal itself unless otherwise indicated or requested by the County. Your proposal must be complete without relying on external websites, sales brochures, marketing materials or white papers.

The County reserves the right to accept proposals other than those with lowest costs.

E. PROPOSAL RECOMMENDATION

The Evaluation Committee will recommend a provider or providers or may recommend that the proposals be rejected. The County will then make its own decision as to whether to accept or reject the recommendations from the Evaluation Committee. Ultimate acceptance or rejection of the recommended proposal and execution of a contractual agreement is the independent prerogative of the County, notwithstanding any recommendations made by the Evaluation Committee. The County reserves the right to negotiate with any provider to finalize an agreement in relation to the proposer's response.

The County strongly encourages proposals from a wide variety of agencies and organizations. Proposals will be evaluated on the quality of proposed services and the

ability to meet the requirements of the program. The County is interested in proposers who exhibit expertise in providing service to older adults and adults with disabilities of diverse backgrounds and cultures. The County is also interested in proposers who demonstrate considerable community linkages and support.

F. NOTICE TO PROPOSERS

The County is not required to give notice to proposers in any specific format or on any particular timeline. At some point prior to execution of a final agreement for the requested services, the County will notify those who submitted proposals of their non-selection. Proposers may be notified at different times depending on the needs of the County.

G. PROTEST PROCESS

If a proposer desires to protest the selection decision, the proposer must submit by facsimile or email a written protest within five (5) business days after the delivery of the notice about the decision. The written protest should be submitted to the Director of Aging and Adult Services as outlined below. Protests received after the deadline will not be accepted. Protests must be in writing, must include the name and address of the proposer and the RFP number, and must state all the specific grounds for the protest. A protest that merely addresses a single aspect of the selected proposal (for example, comparing the cost of the selected proposal in relation to the non-selected proposal) is not sufficient to support a protest. A successful protest will include sufficient evidence and analysis to support a conclusion that the selected proposal, taken as a whole, is an inferior proposal.

The County will respond to a protest within ten (10) business days of receiving it, and the County may, at its election, set up a meeting with the proposer to discuss the concerns raised by the protest. The decision of the County will be final. The protest letter must be sent as follows:

Lisa Mancini, Director,
Aging and Adult Services
lmancini@smcgov.org
Facsimile: 650-573-2193

SECTION V – PROPOSAL SUBMISSION REQUIREMENTS

The proposal should be submitted in the following format:

A. GENERAL INSTRUCTIONS

All proposals should be typewritten or prepared on a computer, using Arial 12-font, and have consecutively numbered pages, including any exhibits, charts, and/or other attachments.

All proposals should adhere to the specified content and sequence of information described by this RFP.

Submit one (1) complete electronic (PDF, Microsoft Word document, etc.) version of your proposal and any required attachments to the County via www.publicpurchase.com per the instructions found on the publicpurchase.com website. **Additionally, four (4) complete hard copies of each proposal and any required attachments shall be received by the County by the proposal due date addressed to:**

Audrey Moore-Burdelle, Contracts Administrator II
Aging and Adult Services
801 Gateway Boulevard, Second Floor
South San Francisco, CA 94080

B. COVER LETTER / LETTER OF INTENT

Provide a one page cover letter/letter of intent on your letterhead that includes the address, voice and facsimile numbers, and e-mail address of the contact person or persons. List the name and title of each person authorized to represent the proposer in negotiations.

Unless the proposer is an individual, all proposals must be signed with a firm/company/partnership/entity name and by a responsible officer or employee indicating that officer or employee's authorization to commit the proposer to the terms of the proposal. Obligations assumed by such signature must be fulfilled.

C. SPECIFIED CONTENT AND DETAILED SEQUENCE OF INFORMATION IN THE RFP

Each proposal should include sections addressing the workplan guidelines specified in the applicable Program Standards and Workplan Guidelines. The proposer should be sure to include all information that it feels will enable the Evaluation Committee and, ultimately, the County to make a decision. Failure of the proposer to provide specific, detailed information may result in its proposal being rejected in favor of a sufficiently-detailed proposal. Any necessary exhibits or other information, including information not specifically requested by this RFP but that you feel would be helpful, should be attached to the end of the proposal. The party submitting the materials should keep in mind the limitations on confidential information described in Section IV.

SECTION VI – ENCLOSURES

Enclosure 1 Sample Standard Contract Template

Enclosure 2 Attachment I: Assurance of Compliance with Section 504 of the Rehabilitation Act of 1973, as Amended

Enclosure 3 Living Wage Ordinance

Enclosure 4 Proposal Cover Sheet

Enclosure 5 List of Authorized Signatures

Enclosure 6 Budget Checklist and Instructions

Enclosure 7 Budget Template

Enclosure 8 HICAP Budget Instructions

Enclosure 9 HICAP Budget Template

Enclosure 10 Poverty Guidelines 2016

Enclosure 11 CARS Specifications

Enclosure 12 Emergency Preparation

Enclosure 13 Corrective Action Policy

Enclosure 14 ADA Monitoring Information

Enclosure 15 2015 CA Statewide Guideline for Legal Assistance

Enclosure 16 Food Service Agreement

Enclosure 17 Program Standards and Workplan Adult Day Care/Adult Day Health Care

Enclosure 18 Program Standards and Workplan Congregate Nutrition

Enclosure 19 Program Standards and Workplan Family Caregiver Support

Enclosure 20 Program Standards and Workplan Health Promotion

Enclosure 21 Program Standards and Workplan Health Insurance Counseling and Advocacy Program (HICAP)

Enclosure 22 Program Standards and Workplan Home Delivered Meals

Enclosure 23 Program Standards and Workplan Information and Assistance

Enclosure 24 Program Standards and Workplan Legal Assistance/Kids in Crisis/Clients' Rights Advocate

Enclosure 25 Program Standards and Workplan Ombudsman

Enclosure 26 Program Standards and Workplan Transportation

Enclosure 27 Program Standards and Workplan Fiscal / Budget Standards

SECTION VIII REGULATIONS REFERENCES

California Code of Regulations, Title 22, Division 1.8, California Department of Aging
[https://govt.westlaw.com/calregs/Browse/Home/California/CaliforniaCodeofRegulations?guid=I69FD3880D4B711DE8879F88E8B0DAAAE&originationContext=documenttoc&transitionType=Default&contextData=\(sc.Default\)](https://govt.westlaw.com/calregs/Browse/Home/California/CaliforniaCodeofRegulations?guid=I69FD3880D4B711DE8879F88E8B0DAAAE&originationContext=documenttoc&transitionType=Default&contextData=(sc.Default))

United States Code (USC), Title 42, Chapter 35 – Programs for Older Americans
<https://www.gpo.gov/fdsys/pkg/USCODE-2010-title42/html/USCODE-2010-title42-chap35-subchapII-sec3020d.htm>

Older Americans Act, as Amended 2006 (Unofficial Compilation). <https://aoa.acl.gov/>

Mello-Granlund Older Californians Act.
https://www.aging.ca.gov/AboutCDA/Older_CA_Act.aspx

California Retail Food Code, Effective January 1, 2016
<http://www.cdph.ca.gov/services/Documents/fdbRFC.pdf>

California Retail Food Code: Grandfather Clause for Pre-existing, Non-conforming structures & equipment.
https://www.aging.ca.gov/Docs/AAA/Laws_Regulations_Policies/CRFC_GC.pdf

California Welfare and Institutions Code

Code of Federal Regulations