

REQUEST FOR PROPOSALS



Electronic Document Management System

H.I.T.–2017-001- ELECTRONIC DOCUMENT
MANAGEMENT SOFTWARE

County of San Mateo Health System
Aging & Adult Services

Release Date: FEBRUARY 15, 2017

Responses must be Received
by 4:00 p.m. Pacific Standard Time

on

**REQUEST FOR PROPOSALS
FOR
ELECTRONIC DOCUMENT MANAGEMENT SYSTEM**

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

Proposals must be submitted electronically to
www.publicpurchase.com

By 4:00 p.m. Pacific Time on APRIL 6, 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 is a public record in its entirety. Also, all information submitted in response to this Request For Proposals is itself a public record **without exception**. Submission of any materials in response to this Request For Proposals 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, this Request for Proposals (RFP) seeks a provider of an Electronic Document Management Solution (EDM) that will support its operational needs and integrate with core Line of Business (LOB) applications. The purpose of the RFP is to select an EDM product that will make client information accessible and available in the most efficient way within the Aging and Adult Services (AAS) Division of the San Mateo County Health System. AAS requires a system that is standards based, flexible, and scalable. AAS is committed to a fair and open selection process and to establishing a long-term, mutually beneficial relationship between AAS and the selected vendor. The target start date and term for the proposed services is 8/2017 through 7/2020, subject to negotiation of a final agreement.

B. BACKGROUND

Specific Services Provided by AAS:

24 Hour Emergency and Advice Line

In-Home Supportive Services:

The In-Home Supportive Services (IHSS) program provides services to Medi-Cal eligible aged, blind or disabled individuals, including children, to assist them to remain safely in their own homes as an alternative to out-of-home care.

Multipurpose Senior Services:

The Multipurpose Senior Services Program (MSSP) provides social and health care management to people 65 or older who are eligible for Medi-Cal. The program aims to keep clients living independently in the community and to prevent or delay placement in a nursing facility. MSSP provides services to eligible clients and their families that assist clients to remain in their homes. MSSP Case Managers work collaboratively with individuals, families and communities as well as health team members to promote the client's independence, autonomy and a sense of well-being.

CCI (Coordination of Care Initiative):

This is a three year pilot between AAS and Health Plan of San Mateo to provide coordinated health, medical, and social services to high risk individuals. The overarching goal is to coordinate appropriate services to allow the individual to remain living in their home.

Representative Payee:

The Representative Payee Program is responsible for managing the government benefits of individuals on an on-going basis. This includes applying for government benefits on behalf of individuals, establishing budgets and paying monthly expenses, monitoring accounts to maintain eligibility for benefits, and completing Medi-Cal redetermination and Social Security reviews.

Adult Protective Services:

Each California County has an Adult Protective Services (APS) Division to help elder (65 years and older) and dependent (18 to 64 year-olds with disabilities), when these adults are unable to meet their own needs or are victims of abuse, neglect or exploitation. County APS social workers investigate reports of abuse of elders and dependent adults who live in private homes, apartments or hotels, or where the suspected abuse occurs in hospitals or health clinics and the alleged abuser is not a staff member.

Public Guardian Services and Trust Accounting Services:

Under California law, the Superior Courts may appoint the Public Guardian, staffed within AAS conservator of an individual person and/or estate of the individual person. The Public Guardian/Public Conservatorship program serves elderly and disabled adults whose physical or mental disabilities result in their being unable to provide for their needs for health care, food, clothing or shelter and/or unable to manage their own finances or resist fraud or undue influence. There are two categories of conservatorships in which the Public Guardian may be appointed. Probate Conservatorships are primarily established for adults who, as a result of dementia or other cognitive impairment, cannot care for themselves or manage their own finances. LPS Conservatorships are established to secure mental health treatment placement for people who are gravely disabled because of a mental illness, and as a result are unable to provide for their food, clothing, shelter, and treatment needs.

Trust Accounting Services handles the securing, safeguarding and management of the financial affairs of persons for whom the Public Guardian has been appointed conservator. From time to time, the Public Guardian is appointed the successor trustee of a trust, often for the benefit of a person under conservatorship. Trust Accounting Services also handles the administration of such trusts.

The Public Guardian program handles the day-to-day case management of persons under Probate or LPS conservatorship, including housing or facility placement, medical care, social services, clothing and other personal needs.

Public Administrator Services and Trust Accounting Services The Public Administrator Program serves the public by investigating and administering the estates of persons in San Mateo County who die without an appropriate person willing or able to act as the administrator of the estate/ executor of their will.

Pursuant to CA law, the Public Administrator provides the following services

- Protects the decedent's property from waste, loss or theft;
- Makes appropriate burial arrangements;
- Conducts thorough investigations to discover all assets;
- Liquidates assets at public sale as necessary and appropriate;
- Pays valid creditors as estate assets allow;
- Locates persons entitled to inherit from the estate; and
- Distributes the estate to heirs/legatees.

AAS's Trust Accounting Services handles the asset management, liquidation and accounting functions of the Public Administrator program.

Additional Services

AAS contracts with other agencies, community-based organizations (CBOs) to provide needed services. Services performed through contracts with CBOs include the following:

- Adult Day Care / Adult Day Health Care
- Congregate Nutrition
- Employment
- Family Caregiver Support Program
- HICAP (Health Insurance Counseling and Advocacy Program) of San Mateo County
- Health promotion
- Home Delivered Meals
- Information & Referral
- Legal assistance
- Ombudsman
- Transportation

EXISTING APPLICATIONS

The following tables list the majority of the applications currently used in AAS:

Table 1: primary applications currently used to document activities/services provided by AAS.

Application	Function	Functional Areas
AssureCare (Q)- Core LOB	Case Management	Central Intake <ul style="list-style-type: none"> • Ties line • Probate investigation • APS • Representative Payee IHSS <ul style="list-style-type: none"> • CCI-IHSS Pilot CCI MSSP PG <ul style="list-style-type: none"> • Probate • LPS • Financial Public Authority External CBOs Public Administrator
MedHOK	Case Management	HPSM (external) CCI IHSS Pilot
Panoramic Public Administrator- Core LOB	Trust and Estates Accounting	Public Administrator Trust
Panoramic Public Guardian (Separate instance) - Core LOB	Trust and Estates Accounting	PG <ul style="list-style-type: none"> • Financial • Probate • LPS Representative Payee Probate investigations Trust Accounting Estate Management
CMIPS II- Core LOB	State system that tracks case information and processes payments for the IHSS Programs	IHSS MSSP CCI IHSS Pilot Public Authority (external)

Table 2: other applications accessed by functional areas within AAS.

Ancillary	Function
HealthSuite	HPSM Benefit Administration System (claims and authorization processing)
MEDS	Medical eligibility system
eClinicalworks	Ambulatory EHR used by San Mateo Medical Center
Sorian	San Mateo Hospital EHR
CARS	California Aging Reporting System

Avatar	Behavioral Health Case Management Application
MedHOK	HPSM Medical Case Management Application
DocStar	Houses the Treatment Authorization Request for HPSM
Excel	Used to manipulate extracts from the various systems; to manage workloads, to manage estate and other accounting functions; to manage QA activities, etc.
Ancestry.com	Used to search for potential beneficiaries
DMV Direct	Used for title searches to verify ownership of vehicles
Accurint	Used to assist in locating people, accurately verify identity, perform in-depth due diligence, obtain history of where a person has lived, etc.
Yahoo Finance	Used to obtain value of stocks that may be part of an estate
FileZilla	Transfer files to the Controller's Office
IFAS	General ledger balances for Controller's Office to see Panoramic total transactions.

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 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.

SECTION II – SCOPE OF WORK

A. DESCRIPTION

The scope of the project is to identify, procure, and implement an EDM platform for AAS that will improve and enhance the work of staff. AAS would like to integrate its various business processes using technology to help ensure the integrity of data management. Operationally, the integration of LOB applications and improvement of workflow processes will allow program staff to devote more time to the delivery of quality services to San Mateo residents. Electronic files allow AAS to reduce storage and warehouse costs for document retention, with the cost savings applied to benefit direct services.

AAS is seeking the implementation of EDM to enhance delivery of services to more than five thousand clients. AAS requires a solution with features that are adaptable to the needs of AAS staff and allows easy integration with LOB applications. By implementing an EDM system, AAS expects to:

- Improve and automate workflow processes
- Integrate line-of-business (LOB) applications and other information sources
- Reduce volume of paper-based files by storing and accessing them electronically
- Reduce storage and warehouse cost for retention of business documents

Additional information is attached under TAB 8 below.

B. LENGTH OF AGREEMENT

The anticipated duration of the agreement will be for three years, with the term tentatively to begin August 2017 and end July 2020.

C. FUNDING

This project will be funded through normal budget allocations for the term of the contract

D. ADDITIONAL REQUIREMENTS/CONSIDERATIONS

Any EDM selected through this RFP must clearly demonstrate its compliance with all state and federal requirements concerning confidentiality and security of data, including but not limited to, where applicable, the Health Insurance Portability and Accountability Act of 1996.

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 **4:00p.m. on MARCH 6, 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:

**FRIDAY MARCH 3, 2017
8AM– 4PM
225 37TH AVENUE
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 an 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. 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 attached to this RFP, to determine whether your contract is covered by the Ordinance or is exempt.

If the contract is exempt from the Ordinance 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 fact that (1) the contract is exempt from the Ordinance or it has no covered employees and (2) 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	2/15/2017
Proposer’s Conference	3/3/2017
Questions Submitted to County Deadline	3/6/2017
Release Responses to Questions	3/17/2017
Proposal Deadline	4/6/2017
Formal Review of Proposals ⁽¹⁾	4/20/2017
Vendor Demo of Product	5/29/2017
Contract Negotiations Begin ⁽¹⁾	6/15/2017
Protest Deadline ⁽¹⁾	8/2/2017
Recommendation to Board of Supervisors ⁽¹⁾	7/31/2017
Board of Supervisor Meeting ⁽¹⁾	9/12/2017
Contract start date/Project start date ⁽¹⁾	10/2/2017

⁽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.

Proposal: The RFP response will be submitted electronically to www.publicpurchase.com by **4:00 p.m. Pacific Standard Time on APRIL 6, 2017**

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. 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

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.

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 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 H.I.T. Director, Portfolio and Program Management 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 15 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:

Thomas Collins

H.I.T. Director, Portfolio and Program Management

TCollins@smcgov.org

SECTION V – PROPOSAL SUBMISSION REQUIREMENTS

The proposal should be submitted in the following format:

A. GENERAL INSTRUCTIONS

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.

B. COVER LETTER

Provide a one page cover letter 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 following information in the order shown in the following section. 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.

D. TABBING OF SECTIONS

TAB 1 Qualifications and Experience:

- 1) Provide a statement of qualifications for your organization, including an organization chart, a statement of the size of firm, a description of services provided by your organization, and a statement of the extent of experience/history providing the services requested by this RFP.
- 2) How many full time employees (FTEs) do you plan to assign to this project if you are selected?
- 3) How many people in total are employed by your company? Delineate between employees and consultants.
- 4) If applicable, list the professional qualifications for each individual that would be assigned to provide services requested by this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae for each such individual if the resume/CV includes all the requested information.

TAB 2 Philosophy and Service Model:

This section describes your philosophy and service model for meeting the services required by this RFP. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (including planning for absences and back-up coverage, training, background checks, and staff monitoring, etc.), and equipment or other resources provided by you (if applicable). Keep these considerations in mind as you respond to the following:

- 1) Describe how you will fulfill the needs of the County described in this RFP. Attach a project plan, if appropriate.
- 2) List your needs for physical space and/or equipment at the County during this engagement, if any, aside from space or equipment that would be provided by the County as an obvious aspect of the requested services (for example, space to treat patients, computers to document services, etc.).
- 3) Identify how you will meet all other aspects of the scope of work and related requirements stated above. List any items that you cannot provide.
- 4) Describe the measurements/metrics/deliverables/assessments that you will provide on at least an annual basis to allow the County to assess the services you will provide.
- 5) Provide information on any other pertinent services, if any, that you will offer that will reduce costs or enhance revenue for the County.

TAB 3 Customer Service:

- 1) How will your services meet the needs of County customers and/or the public?
- 2) In the event of a routine problem, who is to be contacted within your organization?
- 3) In the event of the identification of a problem by the County, its clients/patients, and/or other applicable constituents, describe how you will address such problems and the timeframe for addressing them.

TAB 4 Claims, Licensure, Non-Discrimination, and Health Insurance Portability and Accountability Act (HIPAA) Violations Against Your Organization:

List any current claims against you or your organization or one or more employees of your organization relating to licensure, HIPAA violations, or unlawful discrimination, as well as any such claims asserted in the past five years, and indicate which, if any, resulted in findings of liability and/or legal judgments against you, your organization, or any employees of your organization.

TAB 5 Cost Analysis and Budget for Primary Services:

- 1) Provide a detailed explanation for all costs associated with your providing the requested services if you are selected.
- 2) Is travel time to the County expected to be billable? If so, how will travel time invoices be calculated? Generally, proposals that do not include travel time or expenses are preferred unless the services requested require travel as part of the service.
- 3) Include start-up costs if any.
Complete the summary cost proposal (attach)

Summary Cost Proposal for County of San Mateo Aging & Adult Services (CSM-AAS)					
	Estimated Users	Estimated Hours	Average Unit Cost for 180 Users	Blended Average Hourly Rate	Total Cost
Annual Software & Hosting (SaaS)	200				\$
Professional Services					\$
Hardware					\$
Total					\$
Average Year 1 Cost Per User					\$

What are the key features of your product and solution for the CSM-AAS' Electronic Document Management System?

<p>Why is your EDM product and solution the best solution for the CSM-AAS?</p>
<p>What can your EDM product and solutions do that your competitors can not do?</p>
<p>How do you ensure that CSM-AAS will have a successful, efficient, and effective EDM implementation and final product?</p>
<p>URL Link for Product Demonstration for CSM-AAS:</p>

TAB 6 Cooperative Purchasing:

- 1) State whether the resultant contract can be extended to other San Mateo County departments and/or public agencies in the San Francisco Bay area upon their request. Your response to this inquiry will not affect the selection decision unless to break a tie between two proposals when all other factors are deemed to be equal by the County.

TAB 7 Quality/Program Evaluation:

Each program may have specific quality/evaluation issues, below are some examples:

- 1) Describe the Quality Improvement plan. The plan should include a description of utilization review, co-occurring capability development, medication monitoring, case documentation, peer review, and other issues pertaining to quality improvement mandates and policies.
- 2) Describe a contingency emergency plan.
- 3) Describe credentialing/licensing.

TAB 8 System Requirements (PRJ539):



PRJ539Requirements
.xlsx

TAB 9 References:

- 1) Three business references for which you have recently provided similar services using the cost comparison sheets (attached).



EDM RFP Cost
Comparison.docx

TAB 10 Statement of Compliance with County Contractual Requirements:

A sample of the County's standard contract (including Exhibits A and B) is attached to this RFP. Each proposal must include a statement of the proposer's commitment and ability to comply with each of the terms of the County's standard contract, including but not limited to the following:

- 1) The County non-discrimination policy
- 2) The County equal employment opportunity requirements
- 3) County requirements regarding employee benefits
- 4) The County jury service pay ordinance
- 5) The hold harmless provision
- 6) County insurance requirements
- 7) The County Living Wage Ordinance
- 8) All other provisions of the standard contract

Review link under Section VI Enclosures for items 1 - 8

In addition, the proposer should include a statement that it will agree to have any disputes regarding the contract venued in San Mateo County or Northern District of California.

The proposal must state any objections to any terms in the County's contract template and provide an explanation for the inability to comply with the required term(s). If no objections are stated, the County will assume the proposer is prepared to sign the County standard contract template as-is.

NOTE: The sample Standard Contract Template enclosed with this RFP is a template and does not constitute the final agreement to be prepared for the selected service provider. Do not insert any information or attempt to complete the enclosed sample

contract template. Once a provider is selected, the County will work with the selected provider to draft a provider-specific contract using the template. However, each proposal should address the general terms of the standard contract as requested within this RFP.

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

Enclosed are samples of enclosures one, two, and three



Countywide_Over_1
1_16_16.docx



rehabilitation_act504
_attachment_i.docx



living_wage_ordinan
celwo.pdf