



SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
 & RECOVERY SERVICES**

2000 Alameda de las Pulgas
 Suite 235
 San Mateo, CA 94403
 650-573-2541 T
 650-573-2841 F
 smchealth.org

June 13, 2019

Dear Prospective Proposer:

The San Mateo County Health, Behavioral Health & Recovery Services Division is hereby announcing that the calendar of events for the Enhanced Pre-Crisis Outreach RFP has been updated, including extending the date for proposals to be submitted **(July 10, 2019 by 4pm)** Please see the updated calendar of events below:

| EVENT | DATE |
|---|----------------------|
| Release Request for Proposals | May 10, 2019 |
| Questions Submitted to County Deadline | May 20, 2019 |
| Proposer's Conference | June 5, 2019 |
| Release Responses to Questions | June 14, 2019 |
| Proposal Deadline | July 10, 2019 |
| Formal Review of Proposals ⁽¹⁾ | July 18, 2019 |
| Notification of Funded Proposals ⁽¹⁾ | July 22, 2019 |
| Protest Deadline ⁽¹⁾ | July 29, 2019 |
| Contract Negotiations Begin ⁽¹⁾ | July 30, 2019 |
| Recommendation to Board of Supervisors ⁽¹⁾ | August 2019 |

(1) Dates are subject to change

The full RFP with the updated calendar of events can be found at <https://smchealth.org/rfps>

Sincerely,

Brad Johnson
 Management Analyst
BrJohnson@smcgov.org
 650-573-2893





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NOTICE OF REQUEST FOR PROPOSALS OPPORTUNITY

Dear Prospective Proposer:

San Mateo County Health is soliciting proposals from qualified and interested providers for the provision of Enhanced Pre-Crisis Outreach Support Team Services to clients of the Behavioral Health & Recovery Services Division. The Request for Proposals for these services can be viewed and downloaded by going to www.smchealth.org/bhrs/rfp. If unable to download, paper copies of the RFP may be requested via email – brjohnson@smcgov.org.

All interested parties are invited to attend the non-mandatory proposers' conference to be held on June 5, 2019 from 1:30 pm – 2:30 pm in room 201 at 2000 Alameda de las Pulgas in San Mateo. *Please R.S.V.P. to brjohnson@smcgov.org, if you plan to attend.*

The deadline for submitting a proposal is 4:00 P.M. PST on July 10, 2019.

Sincerely,

Susann Reed

Susann Reed
Contract Manager
Behavioral Health and Recovery Services





**SAN MATEO
COUNTY HEALTH**

REQUEST FOR PROPOSALS

Enhanced Pre-Crisis Outreach
Support Team

RFP Number 2018-011

San Mateo County Health

Release Date: May 10, 2019

Responses must be Received
by 4:00 p.m. Pacific Standard Time
on **July 10, 2019**

REQUEST FOR PROPOSALS
FOR
ENHANCED PRE-CRISIS OUTREACH SUPPORT TEAM

Interested vendors must register online with the County at
<http://www.smchealth.org/bhrs/rfp>

Proposals are due by 4:00 p.m. Pacific Time on July 10, 2019

PROPOSALS MAY 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 Enhanced Pre-Crisis Outreach Support Team Services to seriously mentally ill adults in San Mateo County. The target start date and term for the proposed services is July 1, 2019 through June 30, 2022, subject to negotiation of a final agreement.

B. ORGANIZATIONAL BACKGROUND

These statements were developed out of a dialogue involving consumers, family members, community members, staff and providers sharing their hopes for the Behavioral Health and Recovery Services (BHRS) Division. The members of the BHRS community agree to support the Vision, Mission and Values, and to strive to demonstrate our commitment to these concepts within our individual and collective responsibilities.

Vision

We envision safer communities for all where individuals may realize a meaningful life and the challenges of mental health and/or substance use are addressed in a respectful, compassionate, holistic and effective manner. Inclusion and equity are valued and central to our work. Our diverse communities are honored and strengthened because of our differences.

Mission

We provide prevention, treatment and recovery services to inspire hope, resiliency and connection with others to enhance the lives of those affected by mental health and/or substance use challenges. We are dedicated to advancing health and social equity for all people in San Mateo County and for all communities. We are committed to being an organization that values inclusion and equity for all.

Values

- *Person and Family Centered*
We promote culturally responsive person-and-family centered recovery.
- *Potential*
We are inspired by the individuals and families we serve, their achievements and potential for wellness and recovery.
- *Power*
The people, families, and communities we serve and the members of our workforce guide the care we provide and shape policies and practices.
- *Partnerships*

We can achieve our mission and progress towards our vision only through mutual and respectful partnerships that enhance our capabilities and build our capacity.

- *Performance*
We use proven practices, opportunities, and technologies to prevent and/or reduce the impacts of mental illness and addiction and to promote the health of the individuals, families and communities we serve.

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

Contractor shall provide a targeted enhanced pre-crisis outreach team to be called Family Assertive Support Team (FAST) that will consist of a clinical case manager, and peer counselors/family partners. FAST will provide in-home outreach and engagement services to non-homeless individuals and families who express concern about changing symptoms or behaviors in those individuals. Examples of changes in behavior, thoughts and emotions that include but are not limited to heightened perceptual sensitivity, magical thinking, unusual perceptive experiences, disorganized or digressive speech, unusual fears, uncharacteristic unusual behavior and reduced social interaction. Included are concerns about individuals' deterioration in functioning. FAST shall provide in-home assessment, crisis intervention, case management and support services (including information and education about behavioral health services and community resources, linkages to access outpatient mental health care and rehabilitation and recovery services among others) to individuals with Seriously Mentally Ill (SMI) and their family or caretaker, as necessary peer and family members shall be integrated in to the FAST team.

This program shall increase family member satisfaction with the Health Department's System of Care as measured by family member feedback. This program will also reduce the effects of untreated mental illness in individuals with SMI and their families as measured by a survey contractor gives to clients and family members, related to the services received.

The program shall be welcoming to diverse cultural populations in the community and to individuals with co-occurring disorders by providing informational materials, regarding services. Contractor shall provide outreach and engagement to individuals who are reluctant to receive community-based outpatient mental health treatment. Services shall be County wide. If requested by a BHRS regional clinic, the case manager will attend meetings related to their shared clients.

a. The team will provide the following services to the client:

- 1) Assessment of symptoms
- 2) Client coaching and education
- 3) Motivational work for treatment
- 4) Escort to clinic for same day access
- 5) Brief targeted case management
- 6) Time-limited specific follow-up
- 7) Referral to respite services when needed

b. The team will provide the following services to the family or caretaker:

- 1) Assessment of family's knowledge and attitudes
- 2) Education of family about symptoms and triggers
- 3) Guidance of family about what to expect and appropriate responses
- 4) Education of family about treatment options and their role in motivating client
- 5) Follow-up with family until crisis is averted or next steps are completed
- 6) Psychosocial education for client and family regarding behavioral health resources and system of care, medication, self-care, and coping skills.

c. The number of unduplicated clients to be served is a minimum of eighteen (18) to twenty (20) per quarter and a minimum of seventy-two (72) clients per year.

d. Staffing

- 1) One FTE licensed clinician
- 2) One FTE or two .5 FTE family partners
- 3) Two .5 FTE or four .25 FTE peer counselors
- 4) One .10 FTE psychiatric consultation

Family partners and peer counselors will have personal lived experience of mental illness and recovery.

e. Training Required

Training for FAST staff will include the training listed in III below and additionally:

- 1) LOCUS
- 2) NAMI Family to Family
- 3) NAMI Peer to Peer

f. Outcomes

A report on the outcomes listed below is to be provided by Contractor every six months to the Deputy Director of Adult and Older Adult or designee.

- 1) One hundred percent (100%) of participants will receive a mental health and substance abuse assessment within the first thirty (30) days of engagement.
- 2) One hundred percent (100%) of participants and family members shall receive education about mental illness, substance use and accessing services
 - Contractor will provide background and contact information about NAMI and the local meetings
 - Contractor shall encourage families to participate in “Family to Family” trainings
- 3) Sixty-five percent (65%) of participants will choose to engage in outpatient mental health services, rehabilitation and recovery services or other non-clinical support services by the end of each fiscal year.

Contractor shall use an assertive, individualized, engagement and assessment process. Contractor shall follow up on all referrals received, and conduct numerous outreach visits to the participant’s home or other location. Contractor shall conduct a behavioral health screening as well as a LOCUS to determine the appropriate level of care. Contractor shall ensure the participant is engaged in indicated outpatient mental health services prior to case closure, including ensuring that linkages to spiritual, recreation, social and physical health are provided as indicated.

Contractor shall implement a tracking system to ensure participants are achieving successful linkage to services and averting hospitalization and incarceration. On a weekly basis, the team should log in consumer outcome data inclusive of successful linkages as well as any hospitalizations into their tracking system. At the end of each quarter, the contractor shall compile the data and report it in a Quarterly Status Report.

- 4) One hundred percent (100%) of participants will be screened to determine the need for referral to primary care.
- 5) Seventy-five percent (75%) will be diverted from hospitalization (not Psych emergency) and/or jail.
- 6) Eighty percent (80%) of participants and family members shall complete a satisfaction survey.
- 7) At the end of each fiscal year, eighty percent (80%) of participants and family members completing a satisfaction survey shall demonstrate satisfaction with the Team’s services.

g. Specific Requirements for Service Delivery

- 1) Contractor shall provide best and evidence-based practices in outreach and engagement services, to include but not limited to: Motivational Interviewing, Harm Reduction, etc.

- 2) Contractor shall provide culturally relevant services to diverse populations to include non-ethnic populations, including those based on gender (both men and women), and lesbian, gay, bi-sexual, transgendered, and queer/questioning persons.
- 3) Contractor shall provide culturally appropriate services which shall be offered in the participant's/family's preferred language.
- 4) Contractor shall seek out and engage various community groups throughout the county for the purpose of advertising this new service and to engage the broader community.
- 5) Contractor shall provide case management and peer support approximately up to ninety (90) days or until such time as the consumer is ready to transfer to an identified outpatient provider including services to focus on identifying and mitigating the barriers to a successful connection to outpatient services.
- 6) Contractor shall provide outreach and engagement services that include in-home assessment, crisis intervention, case management, and educational and support services to individuals with SMI and their family or caretaker. Outreach and engagement services will be provided where the individual and their significant others are located.
- 7) Contractor shall coordinate transitional services to outpatient programs.
- 8) Contractor shall provide case management services which shall include:
 - On-call response for after business hours and weekends to be handled by 24 hour service already in place.
 - Intensive and as needed outreach and engagement services to persons identified as having a high priority for this service in the participant's residence. The FAST will be staffed so as to allow at least multiple (minimum of 3) in-person attempts at outreach, and multiple additional engagement contacts.
 - FAST will be immediately responsive to calls from the BHRS Director or designee and the Conservator if there is one. The response should be a phone call or text within thirty (30) minutes.
 - Individualized, comprehensive and integrated mental health and substance abuse screening for TAY, Adult and Older Adults, strength based assessment, goal setting and outcome focused.
 - Completion of an initial screening and/or assessment tool that has been mutually agreed upon will be within the first 30 days of service. The LOCUS will be used to identify risk, functional level, engagement and service needs for all FAST consumers.
 - Meeting with County Contract Monitor monthly to discuss ongoing program development and staffing, review client criteria, and review cases.
 - Families will be invited to participate with FAST in NAMI meetings for support and updates about resources.
 - Contractor will attend every other month NAMI Meetings to educate NAMI members on their services and to provide support.
 - Peer and family members who are part of FAST will provide services to include: information and education about mental health, support services and community resources, linkages to outpatient mental health care, and other support services and resources as desired by the participant.

- Linkage and referrals to community based organizations including: primary care clinics, alternative healing centers and organizations, faith based institutions, ethnic organizations and peer run programs.
- Contractor shall have collaborative relationships with local peer and family service providers.
- Contractor shall provide a defined mechanism for after business and weekend telephone response, emergency telephone consultation and/or referral to resources that are available at that time.
- FAST team members shall carry cell phones to assist them with their case management services.

B. LENGTH OF AGREEMENT

The anticipated duration of the agreement will be for three (3) years, with the term tentatively to begin July 1, 2019 and end June 30, 2022. Included in this RFP is the option to renew for an additional two (2) years pending program evaluation, availability of funding, and division approval.

C. FUNDING

The anticipated amount of finding for the programs first fiscal year (FY 2019-20) is THREE HUNDRED SIXTEEN THOUSAND TWO HUNDRED FORTY-FIVE DOLLARS (316,245). Funding for subsequent years is contingent upon funding availability, program evaluation, and division approval

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. All questions regarding this RFP must be submitted in writing and contain a contact name and address, fax, or e-mail for response. Questions must be received by BHRS no later than **4:00 p.m.**, on the due date for question submission as referenced in Section IV.A. Tentative Schedule of Events. All questions and answers (Q&A) will be distributed before the application due date to applicants who participated in the Proposers' Conference. The Q&A will also be posted on the BHRS website. **No telephone consultation will be provided.**

Submit questions to:
 Brad Johnson, Management Analyst
 Behavioral Health and Recovery Services

2000 Alameda de las Pulgas, Ste. 280
San Mateo, CA 94403
Fax: 650-573-2893
Email: brjohnson@smcgov.org

It is the responsibility of each proposer to register and check the website (<http://www.smchealth.org/bhrs/rfp>) 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:

**June 5, 2019
1:00 p.m. – 2:30 p.m.
Room 201, 2000 Alameda De Las Pulgas
San Mateo, CA 94403**

During the Proposer Information Conference, the County will distribute responses to questions received prior to the Conference and may respond to additional questions received during 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 <http://www.smchealth.org/bhrs/rfp> 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 <http://www.smchealth.org/bhrs/rfp> 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 or Late 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.

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 | May 10, 2019 |
| Questions Submitted to County Deadline | May 20, 2019 |
| Proposer’s Conference | June 5, 2019 |
| Release Responses to Questions | June 14, 2019 |
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| Notification of Funded Proposals ⁽¹⁾ | July 22, 2019 |
| Protest Deadline ⁽¹⁾ | July 29, 2019 |
| Contract Negotiations Begin ⁽¹⁾ | July 30, 2019 |
| Recommendation to Board of Supervisors ⁽¹⁾ | August 2019 |

(1) Dates are subject to change

B. SUBMISSION OF PROPOSALS

Responses to the RFP should be typewritten or prepared on a computer and have consecutively numbered pages and include the information and format requested in Section V. The whole proposal should not exceed **20** pages not including attachments, exhibits or charts. Please use Arial 12 point font, 1” margins, and 1.5 line spacing.

One (1) signed original, one (1) electronic version (via, flash drive, or email), and seven (7) hard copies must be received and time-stamped prior to **4:00 pm on July 10, 2019**. The original and seven hard/paper copies shall be submitted in a sealed envelope or box.

Submit proposals to:
Brad Johnson, Management Analyst
Behavioral Health and Recovery Services
San Mateo County Health System
2000 Alameda de las Pulgas, Ste. 280
San Mateo, CA 94403
brjohnson@smcgov.org

All responses become the property of the County of San Mateo and will not be returned. The County will not reimburse applicants for any expenses incurred during the development of the response to this RFP.

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:

1. Minimum Requirements

Responses to this RFP must adhere to the format for proposals detailed in Section V - PROPOSAL SUBMISSION REQUIREMENTS. Proposals must include the following minimum requirements to be considered for evaluation:

- a. Proposal was submitted on time;
- b. Proposal is signed by authorized person;
- c. Board, or governing body, authorization letter included granting permission to submit the proposal;
- d. Staffing structure and qualifications are included;
- e. Proposal followed the requested format;
- f. Stated compliance with County RFP and contractual requirements;
- g. References.
- h. Budget

2. Program Specific Requirements

- a. Qualifications and Experience

- i. Was there an adequate description of the qualification and experience of the entity, including capability and experience of key personnel and experience with other public or private agencies to provide these services?
 - ii. Does the agency/provider demonstrate a positive track record with community collaboration and does it currently have a good relationship with San Mateo County or with another public entity?
- b. Philosophy and Service Model
- i. Does the proposed approach to service delivery clearly articulate an understanding of and commitment to the intent of the programs as described in the RFP, including clarity of understanding of the scope of services to be provided, population to be served and appropriateness of the proposed solution/services?
 - ii. Is there sufficient staffing proposed to provide the services?
 - iii. Does staff have diverse language capabilities and/or the availability of interpretation services?
 - iv. Does the agency show involvement of ethnic minorities, women and consumers in service planning and delivery? Does the agency demonstrate understanding and sensitivity to the cultural diversity of consumers in San Mateo County?
 - v. Is there a plan for ongoing staff training and supervision (if applicable)?
- c. Customer service
- i. Is there a plan that includes timelines for routine problem resolution, including performance issues identified by the County?
- d. Claims and/or Violations
- i. Did the proposal address any claims or violations against the provider as outlined in TAB 4 of this RFP?
- e. Cost to the County – Budget
- i. Is there a detailed explanation of service cost and a budget provided?
 - ii. Are there any gaps in the budget?
 - iii. Does the budget include other funding streams?
- f. References
- i. Were references included in the proposal? Were those references relevant to the services within the RFP?
- g. Statement of Compliance with County RFP and contractual requirements
- i. Was a statement indicated that provider would comply with County and contractual requirements included?

h. Quality/Program Evaluation

- i. Was a program evaluation and improvement plan included?
- ii. Was an emergency contingency plan included?
- iii. Was a credentialing/licensing process included that monitors staff 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 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 Chief of the Health System 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:

Chief of the Health System
c/o Brad Johnson, BHRS Management Analyst
brjohnson@smcgov.org
Facsimile: 650-573-2110

SECTION V – PROPOSAL SUBMISSION REQUIREMENTS

In addition to the submission requirements listed in Section IV.B. Submission of Proposals, 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 in below in D. Tabbing of Sections.

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 tabbing sections addressing the information listed below and in the order shown. 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 Cultural Competency and Customer Service:

- 1) Describe how you will involve diverse ethnic/racial and cultural groups in service planning and delivery. What is your organizations plan for providing culturally appropriate services. Attach your Cultural Competency plan if available. The plan should include a description of; a) policies and practices that promote diversity, cultural humility and inclusion; b) formal forums or venues for discussing relevant issues; c) how demographic data will be collected and utilized; d) staffing objectives that reflect the diversity of the community serviced; e) a relevant training plan for staff.
- 2) How will your services meet the needs of County customers and/or the public?
- 3) In the event of a routine problem, who is to be contacted within your organization?
- 4) 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

Include claims or violations in which the health and well-being of our clients was compromised, if there was a misappropriation of funds, if there was fraud of any kind, or if there was a claim/violation in regards to an illegal activity. In addition, include any claims or violations that involve the services indicated in the RFP. Please go back 5 years in your report of claims or violations, and explain how you respond or address claims or violations when they are made.

List any violations that resulted in claims or legal judgments against you or your agency, especially any of the following:

- 1) Current licensure restriction, censure or revocation;
- 2) Health Insurance Portability and Accountability Act (HIPAA) violation;
- 3) Non-discrimination claims against you/your organization;
- 4) Claims/violations which compromised the health and well-being of our clients;
- 5) Claims/violations regarding an illegal act;

- 6) Misappropriations of funds;
- 7) Fraud of any kind.

TAB 5 Cost Analysis and Budget for Primary Services:

- 1) Provide a detailed explanation for all costs associated with the provisions of the requested services should you be 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.

TAB 6 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 7 References:

- 1) List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided.
- 2) Provide at least three client/patient references, if applicable and appropriate, for whom you have provided more than occasional services. Include names, titles, e-mail addresses and phone numbers for these individuals.

TAB 8 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

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.

TAB 10 Board Authorization Letter or Resolution

A letter or resolution from your board should include specific language that states who has the authority to submit a response to a request for proposals, when that authority begins and when that authority ends.

SECTION VI – ENCLOSURES

Appendix 1 Budget

Enclosure 1 Sample Standard Contract Template

Enclosure 2 Standard Agreement Administrative Requirements

Enclosure 3 Living Wage Ordinance

Enclosure 4 HIPAA Requirements

Enclosure 5 Not Used

Enclosure 6 Not Used

Enclosure 7 Fingerprinting certification

Enclosure 8 Chapters 2.84 and 2.85

Enclosure 9 Not Used

Enclosure 10 Attachment I – 504 Compliance