



## County of Sonoma

### REQUEST FOR PROPOSALS (RFP)

The County of Sonoma is pleased to invite you to respond to a Request for Proposals for

### **Sonoma County Coordinated Entry System Operator**

Proposals must be received no later than 2:00 P.M. on November 6, 2025.

County of Sonoma, Department of Health Services  
Homelessness Services Division  
1450 Neotomas Ave, Suite 200  
Santa Rosa, CA 95405  
<http://sonomacounty.gov/Health-Services>



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## **PART ONE – RFP INFORMATION**

### **I. INTRODUCTION/PURPOSE**

The Sonoma County Department of Health Services (Department) is pleased to invite you to respond to a Request for Proposals (RFP) for the Coordinated Entry System (CES). CES is a Continuum of Care-established, system-wide process to quickly and equitably coordinate the access, assessment, prioritization and referrals to homeless-dedicated housing and services for people experiencing homelessness in Sonoma County. This RFP outlines the information necessary to understand the competitive selection process and the required documentation necessary for the submission of proposals. All interested proposers must meet the requirements specified in this RFP. Proposers must have qualified staff on hand for this project and be ready to begin work on the date this project is initiated.

The Department reserves the right to award in any manner determined to be in the best interest of the department including but not limited to issuance of an award under this RFP to a single or multiple individual(s) and organization(s), at its sole discretion. If the Department determines that no proposer meets the requirements of this RFP, the Department, at its sole discretion, reserves the right to reject all proposals.

The Department is an outcomes-based organization. All contracted services are required to support the Department's mission to promote, protect, and ensure access to services to support the health, recovery, and well-being of all in Sonoma County.

The County has allocated approximately \$763,000.00 per year for three years for these services. The contract is expected to begin July 1, 2026, and run through June 30, 2029, a three-year agreement for services. Two one-year optional extensions may be granted depending on available funding and contractor performance, subject to County Board of Supervisors' approval.

### **II. PROJECT BACKGROUND AND DESCRIPTION**

The Coordinated Entry System (CES) facilitates the access, assessment, prioritization and referral of individuals in Sonoma County experiencing homelessness to housing opportunities. The Department contracts with an operator to run the CES system for the Sonoma County Homeless Coalition, representing the Continuum of Care for Sonoma County. The CES was first implemented in Sonoma County in 2015. The CES has had two (2) operators with the current contract ending in June 2026.

### **III. DESIRED GOALS/OBJECTIVES**

The Department of Health Services seeks a Coordinated Entry System (CES) operator to manage the day-to-day operations of the CES. The goal of the CES is to assist the homeless service system of care to resolve individuals' housing crisis quickly. The CES operator prioritizes individuals for housing opportunities using the Sonoma County Homeless Coalition's assessment tool and prioritization process. The CES operator uses this prioritization to make referrals to community providers who operate Rapid Rehousing (RRH), Permanent Supportive Housing (PSH) and Other Permanent Housing (OPH) programs.

The CES operator will build trust and communication among local homeless service providers so that referrals are made appropriately and promptly with a high level of confidence. The CES operator promotes professional and technical capacity within CES so that homeless households get directed to the most appropriate type of housing. The CES operator recruits, trains and maintains relationships with community providers who provide access to the CES through assessment and enrollment. Access Point providers will be monitored by the CES operator to ensure assessment and enrollment is completed in line with the Homeless Coalition’s CES policies and procedures. The approved Sonoma County policies and procedures can be found here:

<https://sonomacounty.gov/Main%20County%20Site/Health%20and%20Human%20Services/Health%20Services/Documents/Homelessness%20Services/Coordinated%20Entry%20System/CES-Policies-and-Procedures.pdf>

The CES operator collects, analyzes and provides data to the Sonoma County Homeless Coalition on CES measures. The CES operator collaborates with the Department of Health Services, Homelessness Services Division to develop and update CES policies and procedures and participates in the Sonoma County Homeless Coalition’s Coordinated Entry Advisory Committee.

#### IV. SCHEDULE

The following schedule is subject to change. Except as provided below, changes will only be made by written amendment to this Request for Proposals, which amendment shall be issued to all parties by the Department issuing this proposal.

| <b>Date</b>        | <b>Event</b>  |
|--------------------|---|
| September 25, 2025 | Release Request for Proposals   |
| October 6, 2025    | Optional Pre-Bid Conference   |
| October 14, 2025   | Proposer’s Questions Due by 5:00 p.m.   |
| October 21, 2025   | County’s Responses to Questions Due   |
| November 6, 2025   | Proposals Due by 2:00 p.m.  |
| November 2025      | Proposals Evaluated by County   |
| TBD                | Interviews Conducted (if applicable)  |
| December 2025      | Notice of Intent to Award<br><i>(subject to delay without notice to proposers)</i>            |
| January 2026       | Board of Supervisors Awards Contract<br><i>(subject to delay without notice to proposers)</i> |

## V. DEFINITIONS OF TERMINOLOGY

**Proposer:** Any person, corporation, or partnership which chooses to submit a proposal.

**Contract:** An agreement for the procurement of items of tangible personal property or services.

**Contractor/Consultant:** The proposer that will be selected to provide goods or services.

**Fiscal Year:** The period beginning July 1 of each year and ending June 30 of the following year.

**Mandatory:** The terms “must”, “will”, “shall”, “is required”, or “are required” identify a mandatory item or factor.

**Qualified Proposer:** A Proposer is considered Qualified if they submit a proposal that satisfactorily addresses the information requested, provides evidence of sufficient organizational and financial resources to ensure viability, documentation of experienced management and trained personnel, and a narrative that provides assurance that services will adequately serve the needs of the County of Sonoma.

**Request for Proposals (RFP):** All documents, including those attached or incorporated by reference, used for soliciting proposals.

**Review Panel:** A committee composed of consumers, providers, and County staff that will be responsible for review and evaluation of the proposals received from Qualified Proposers.

**Assessment Tool:** A standardized assessment for households experiencing homelessness to understand vulnerabilities. The results of this assessment are used to prioritize households for housing opportunities through CES.

**Rapid Rehousing (RRH):** A housing program for homeless individuals that rapidly connects families and individuals to permanent housing through a tailored package of assistance that may include the use of time-limited financial assistance and targeted supportive services.

**Permanent Supportive Housing (PSH):** A housing program for homeless individuals that combines long-term, affordable housing with on-site or off-site supportive services for individuals and families experiencing homelessness with a disability.

**Other Permanent Housing (OPH):** A housing program for homeless individuals that does not fit a Rapid Rehousing or Permanent Supportive Housing model.

**Access Points:** An agency that provides initial Coordinated Entry assessment and enrollment into the CES. These agencies are often nonprofit agencies that provide services to individuals experiencing homelessness.

**Diversions:** A homeless-service strategy that helps individuals and families experiencing housing instability find safe alternatives to emergency shelters. It involves quickly identifying immediate solutions, connecting people with resources, and potentially providing financial assistance to prevent them from entering or returning to the shelter system.

**Housing First:** Housing First is a model that prioritizes providing immediate, permanent housing to individuals experiencing homelessness, without requiring them to meet pre-conditions like sobriety or participation in treatment programs.

**Housing Problem Solving:** person-centered, housing-focused approach to quickly resolve housing crises by finding creative, safe, and cost-effective alternatives to literal homelessness. It focuses on exploring options and resources to help individuals or families avoid or exit homelessness without relying on ongoing housing subsidies or shelter.

**By-Name List:** A real-time list of everyone active and enrolled in CES.

## VI. PROPOSER MINIMUM QUALIFICATIONS

The successful proposer(s) must possess the qualifications listed below. Failure of the proposer to demonstrate that they possess these qualifications may cause the proposal to be considered non-responsive and disqualified from this RFP process.

- a. Experience operating homeless service programs and/or Coordinated Entry systems.
- b. An understanding of Coordinated Entry System and its components.
- c. An understanding of Housing First principles.
- d. Experience with the HUD Continuum of Care program.
- e. Demonstrated experience with Homeless Management Information Systems (HMIS).
- f. Demonstrated experience inputting, cleaning, and tracking data in Homeless Management Information System.
- g. Demonstrated experience with community and stakeholder engagement.
- h. An understanding and/or demonstrated experience with Housing Problem Solving and Diversion.
- i. Experience with case conferencing and working with diverse stakeholders
- j. Demonstrated experience with training and technical assistance.
- k. An understanding of Results Based Accountability (RBA).
- l. Demonstrated ability to provide culturally competent services.
- m. Any other experience and qualifications commensurate with this project.

## VII. CONTRACTOR REQUIREMENTS (SCOPE OF WORK)

Proposers must demonstrate their ability to:

- a. Ensure implementation and use of the standard assessment tool based on local CES policies and procedures for enrollment in the Coordinated Entry System to the greatest extent possible.
- b. Utilize the resulting assessments to refer clients for placement into appropriate housing or onto the most appropriate By-Name List.
- c. Host a case conferencing meeting to refer households to available housing opportunities in a transparent manner.
- d. Develop and implement training for new CES access providers to ensure accurate data and system usage, including an ongoing annual recertification process for staff

completing enrollments into the system.

- e. Develop and implement monthly reoccurring training series for access providers which includes but is not limited to:
  - i. Coordinated Entry Policies and Procedures
  - ii. CES Assessment
  - iii. Housing First
  - iv. Housing Problem Solving/Diversion
  - v. Harm Reduction
  - vi. Mainstream Resources
  - vii. Serving Survivors/Victims of Domestic Violence
  - viii. Conflict Resolution
- f. Provide oversight of access partners' data entry for accuracy.
- g. Participate in meetings regarding the implementation of new projects, eligibility requirements, and training of CES referral process.
- h. Ensure high data quality and data analysis to support appropriate and timely placement and evaluation and fine-tuning of the program design.
- i. Collaborate with Access Point providers throughout Sonoma County to provide access to the Coordinated Entry System from anywhere in Sonoma County.
- j. Support and cooperate with the evaluation and adjustment of the program design by homeless service providers, key stakeholders, and homeless clients.
- k. Provide quarterly data analysis of key system metrics.
- l. Employ 2 FTE (full-time equivalent) Coordinated Entry Housing Navigator Outreach staff. Responsibilities include: locating individuals for referral, collecting project eligibility documentation, voucher documentation, helping participants with associated documentation application processes, conducting warm handoffs to housing programs, and pre-screening potential referrals for eligibility.

Potential proposers must demonstrate an ability to provide culturally competent services that effectively engage and support unsheltered individuals through the outreach component of Coordinated Entry Operations, as well as a diverse range of local community service providers. Services must be delivered in a culturally and linguistically appropriate manner that reflects the varied racial, ethnic, linguistic, and cultural backgrounds of the populations served. This may include, but is not limited to:

- Providing bilingual and bicultural services, especially in languages commonly spoken in the service area.
- Hiring and training staff to recognize and address cultural and systemic barriers to housing and services.
- Ensuring access to interpretation and translation services for individuals with limited English proficiency.
- Developing and maintaining culturally inclusive written materials and outreach documents.

- Implementing equity-informed practices that prioritize fair access and address disparities in service delivery.

### **ACCESSIBILITY Standards**

All consultants responsible for preparing content intended for use or publication on a County-managed or County-funded web site must comply with applicable Federal accessibility standards established by 36 C.F.R. Section 1194, pursuant to Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794(d)), the County’s Web Standards & Guidelines located at <https://sonomacounty.gov/Services/Web-Standards-and-Guidelines/>, and the County’s Web Site Accessibility Policy located at <https://sonomacounty.gov/CAO/Administrative-Policies/9-3-Website-Accessibility-Policy/>.

For any proposal that includes scope involving such website content, proposers shall indicate their capacity and plan for compliance with these requirements.

### **VIII. DATA AND OUTCOME REQUIREMENTS**

The following data shall be provided on a quarterly basis:

- Estimated Unduplicated Numbers served by the project.
- Percent of individuals, within each subpopulation (Individuals, Transitional-Aged Youth, Seniors and Families), exiting the system to permanent housing.
- The median days between program entry and permanent housing placement for all subpopulations.
- The number of access points.
- The number of Coordinated Entry System trainings provided.
- Homeless Management Information System data quality.
- Broken out by race and ethnicity and subpopulation, the number of individuals assessed during the calendar year.
- Broken out by race and ethnicity and subpopulation, the number and percentage of those assessed during the year who are prioritized for housing.
- Broken out by race and ethnicity and subpopulation, the percentage of individuals enrolled in CES who are referred to housing by acceptance status.
- Broken out by race and ethnicity and subpopulation, the percentage of clients enrolled in CES who exit to housing during the year.
- Broken out by race and ethnicity and subpopulation, the median amount of time it takes for a person to move through CES.

The following data shall be provided Semiannually:

- Geographic gaps analysis, comparing the CES Assessments in each subregion.
- Referral rejections percentage out of total for rejection reason.
- Exit destinations from CES by percentage and total number.

- o. Broken out by race and ethnicity and subpopulation, the number of participants who are active vs inactive.
- p. The percentage of the total number of participants on the by-names list, broken out by race and ethnicity and subpopulation.

#### IX. LOCAL PREFERENCE

The County's Local Preference Policy will not be applied to this Request for Proposals, in accordance with funding restrictions which prohibit use of geographic preferences in procurements funded by Department of Housing and Urban Development per 24 CFR.

#### X. OTHER REQUIREMENTS

- a. Homeless Management Information Systems participation.
- b. Support housing providers in Verification of Homeless and Documentation Requirements per HUD Homeless Status Definition Final Rule, December 5, 2011, CFR Parts 91, 582, and 583, by providing HMIS history.
- c. Support housing providers in Verification of Chronic Homelessness Status per HUD Chronically Homeless Definition Final Rule, December 4, 2016, 24 CFR Parts 91 and 578, by providing HMIS history.
- d. Comply with HUD Notice CPD-17-10 and regulations under 24 CFR 578.7(a)(8), including implementing and using a centralized or coordinated assessment system.
- e. Expend funds in compliance with the Continuum of Care Program eligible activities as detailed within 24 CFR 578.53 and 24 CRF 578.59.

## **PART TWO – PROCUREMENT PROCESS**

### **I. PRE-BID CONFERENCE**

An optional virtual pre-bid conference webinar will be held online via Zoom on October 6, 2025 at 11:00 AM to answer questions regarding the RFP specifications and process.

#### **Pre-registration is required.**

To register for this event and receive a link to participate, click on the link below:

[https://sonomacounty.zoom.us/webinar/register/WN\\_edLv4TbnQsSxycfyIUuDhQ](https://sonomacounty.zoom.us/webinar/register/WN_edLv4TbnQsSxycfyIUuDhQ)

After registering, you will receive a confirmation email containing information about joining the pre-bid conference webinar.

### **II. WRITTEN QUESTIONS**

Proposers are required to submit any and all questions in writing per the schedule in order for staff to prepare written responses. Written responses will be shared with all potential proposers through an addendum on the County's Supplier Portal. Questions should be sent via e-mail directly to:

To: [DHS-Procurement@sonomacounty.gov](mailto:DHS-Procurement@sonomacounty.gov)

Subject: Sonoma County Coordinated Entry System Operator – Questions.

Questions will not be accepted by phone.

### **III. CORRECTIONS AND ADDENDA**

1. If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the proposer shall immediately notify the contact person of such error in writing and request clarification or modification of the document. Modifications will be made by addenda as indicated below and notification given to all parties in receipt of this RFP.
2. If a proposer fails to notify the contact person prior to the date fixed for submission of proposals of a known error in the RFP, or an error that reasonably should have been known, the proposer shall submit a proposal at their own risk, and if the proposer is awarded a contract they shall not be entitled to additional compensation or time by reason of the error or its subsequent correction.
3. Addenda issued by the County interpreting or changing any of the items in this RFP, including all modifications thereof, shall be incorporated in the proposal. The proposer shall submit the addenda cover sheet with the proposal.
4. Any oral communication by the County's designated contact person or any other County staff member concerning this RFP is not binding on the County and shall in no way modify this RFP or any obligations arising hereunder.

#### IV. PROPOSAL SUBMISSION AND DUE DATE

Proposals must be received no later than the date and time listed in the schedule, or as revised by addendum. The proposal due date is subject to change. If the proposal due date is changed, all known recipients of the original RFP will be notified of the new date.

- A. Proposers must submit one (1) electronic copy of the proposal to the County of Sonoma's [Supplier Portal](https://esupplier.sonomacounty.ca.gov/). The link to the Supplier Portal is: <https://esupplier.sonomacounty.ca.gov/>.

Hard copy, faxed, and/or emailed submissions will not be accepted.

Note: Proposers must be registered to submit electronic proposals. See registration instructions on the Supplier Portal link above.

- B. The submission of a proposal shall be an indication that the proposer has investigated and satisfied him/herself as to the conditions to be encountered, the character, quality and scope of the work to be performed, and the requirements of the County, including all terms and conditions contained within this RFP.

**Late proposals will not be accepted.**

### PART THREE – INSTRUCTIONS FOR PROPOSAL PREPARATION

To receive consideration, proposals shall be made in accordance with the following general instructions.

#### I. PROPOSAL FORMAT

The proposal must be formatted as follows:

1. Proposal narrative shall use 12-point font with 1-inch margins, normal character spacing, be no less than single-spaced.
2. Sequentially numbered pages (i.e., Page 1 of 17, starting with Table of Contents and continuing through required forms and attachments)
3. The completed proposal shall be without alterations or erasures.
4. No oral or telephonic proposals will be considered.

#### II. PROPOSAL SUBMISSION REQUIREMENTS

For ease of review and to facilitate evaluation, the proposals for this project should be organized and presented in the order requested as follows:

##### A. PROPOSAL COVER SHEET AND CHECKLIST

Include completed Proposal Cover Sheet and Checklist - Proposal Form 1.

- a. Complete and submit Proposal Form 1 to include: the proposing agency's legal name, address, telephone number, IRS status, and type of entity; contact information for the person(s) authorized to execute the proposed contract; and contract information for program and fiscal contacts.

**B. TABLE OF CONTENTS**

Include structure and page numbers for the proposal.

**C. PROPOSAL NARRATIVE TO INCLUDE THE FOLLOWING SECTIONS:**

**SECTION I ORGANIZATION INFORMATION**

- a. Provide a brief summary of proposed program on agency letterhead.
- b. Proposer must disclose any debarment or other disqualification as a supplier or vendor for any federal, state or local entities. Proposer must describe the nature of the debarment/disqualification, including where and how to find detailed information regarding debarment/disqualification.
- c. If this is a partnership or joint venture, describe in detail how the partnership or joint venture will be organized, who will be in overall control of the program, how it will function on a day-to-day basis, what proposer will do to guarantee continuity of services.
- d. Provide agency Organization Chart that identifies organization structure, staff members and titles, and key personnel who will be assigned to this program.
- e. Statement that proposer claims entitlement to the County's Local Preference Policy for Services and has a valid physical address located within Sonoma County from which proposer operates or performs business on a day-to-day basis, and holds a valid business license if required by a city within the jurisdiction of Sonoma County (if applicable).

**SECTION II QUALIFICATIONS AND EXPERIENCE**

Proposer will provide specific information in this section concerning the agency's experience in the delivery of services described in this RFP, preferably within the State of California. Examples of completed projects, as current as possible, should be submitted, as appropriate.

- a. Describe proposer's experience in delivering services.
- b. Describe proposer's experience and knowledge related to Coordinated Entry Systems and operations.
- c. Describe proposer's experience tracking data regarding services provided and utilizing the Homeless Management Information System.
- d. Describe proposer's plan for collecting and reporting required data, outcomes and client progress.
- e. Describe the proposer's experience with Continuum of Care funded programs.
- f. Describe the proposer's experience in developing and delivering trainings as outlined in Part One, Section VII.e, Contractor Requirements, of this RFP. The response should highlight the types of trainings provided and demonstrate experience working with a diverse range of service providers, including

collaborative efforts such as technical assistance, capacity building, and interagency coordination.

- g. Describe the proposer's experience in staying current with state and federal regulations related to homelessness, including any processes or strategies used to ensure ongoing compliance.
- h. Detail the proposer's understanding of various homelessness response program models and project types, such as rapid rehousing, permanent supportive housing, emergency shelter, and street outreach.
- i. Describe the proposer's experience, understanding, and/or partnerships related to preparing individuals for homeless-dedicated housing placements. This should include efforts to support clients in becoming document-ready and demonstrate knowledge of eligibility requirements, including but not limited to the definition and verification of chronic homelessness.
- j. Describe the proposer's experience with homeless-service programs that use Housing First, Diversion, or Results-Based Accountability
- k. **References are required.** Please provide names, addresses, and telephone numbers of contact persons within three (3) client agencies for whom similar services have been provided.
- l. **Cultural Competence**  
Potential proposers must demonstrate an ability to provide culturally competent services. Specifically, proposers must disclose: (1) their previous experience with providing services to the diverse ethnic, linguistic, sexual or cultural population to be served; (2) their current ability to provide the specific project services to the diverse ethnic, linguistic, sexual or cultural population to be served; and, (3) the specific outcome measures, qualitative and quantitative, which demonstrate that the project provides culturally and linguistically competent services.
- m. Applicants who have experience and knowledge of the following are desired; Provide evidence of any areas of expertise the applicant possesses:
  - Permanent Supportive Housing programs for chronically homeless individuals.
  - Rapid Rehousing programs for homeless individuals.
  - Navigating homeless-service systems.
  - Familiarity with Sonoma County resources and services for mental health treatment.
  - Familiarity with Sonoma County homeless services/housing resources and services for substance use treatment.
  - Experience and familiarity with Street Outreach projects
  - Experience utilizing Homeless Management Information Systems and data evaluation

### **SECTION III PROJECT APPROACH AND WORK SCHEDULE**

Proposers must demonstrate knowledge of practices and how to best provide these services to individuals and families experiencing homelessness and those attempting to flee or fleeing domestic violence.

- a. Describe services that will be delivered and your approach to engaging stakeholders to refine service delivery.
- b. Describe the methodology to perform all required services, with an aggressive schedule that will allow services to begin by July 1, 2026, if possible. This schedule should contain specific milestones and dates of completion which will be used to set schedules.
- c. Describe the approach to implementation of the data and outcome requirements described above.
- d. Describe the agency's ability and plan to provide culturally competent and responsive services.
- e. For any proposal that includes scope involving content to be posted to a County website, proposers shall describe their capacity and plan for compliance with ADA requirements.

### **SECTION IV COMPLIANCE**

Describe proposer's plan to ensure compliance with federal rules applicable to participation in Continuum of Care programs 24 CFR Part 578.

### **SECTION V PRIVACY AND SECURITY**

- a. Submit proposer's "HIPAA Authorization to Disclose PHI" in both English and Spanish.
- b. Provide the date of proposer's last HIPAA Security Risk Assessment and the name of firm that conducted the assessment.

### **SECTION VI FISCAL**

- a. Describe proposer's Internal Controls that define separation of duties to mitigate risk and fraud. Attach fraud prevention and risk control policies and procedures to the proposal.
- b. Provide a copy of the organization's most recent Single audit. If a Single audit was not performed, state the reason and provide a copy of organizations independent third-party fiscal audit.

### **SECTION VII COST OF SERVICE / BUDGET**

In 2022, the CES grant was expanded to include 2 outreach workers. The budget must include 2 full-time equivalent (FTE) outreach workers.

- a. Submit an itemized budget and budget narrative. The proposal shall clearly state ALL costs, direct and indirect, associated with the project, broken down by

category of products and services, and all on-going costs for recommended or required products and services, such as maintenance.

- b. The project costs must be broken out and include all expenses that will be charged to the County, including but not limited to hourly rates for labor, software costs, software maintenance costs, implementation fees, shipping, insurance, communications, documentation reproduction, and all expenses, including travel, meal reimbursement, hotel per diems, taxes, etc. Failure to clearly identify all costs associated with the proposal may be cause for rejection of the proposal.
- c. Please note, the County will not pay for services before it receives them. Therefore, do not propose contract terms that call for up-front payments or deposits.

#### **SECTION VIII IDENTIFICATION OF SUBCONTRACTORS**

Proposers shall identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate (1) what products and/or services are to be supplied by that subcontractor and, (2) what percentage of the overall scope of work that subcontractor will perform. If the proposer will be self-performing, that should be stated in this section.

#### **SECTION IX ADDITIONAL INFORMATION**

Include any other information proposer believes to be pertinent but not required.

#### **SECTION X ATTACHMENTS TO PROPOSAL**

List all requested attachments to proposal in the Table of Contents. Proposal Forms not included in above sections should be included in this section.

**Proposal Form 2** - Complete and sign to indicate acceptance of, or exception to, the County's standard professional services agreement and Special Terms and Conditions Exhibits. To acknowledge willingness to accept the sample contract terms or to identify specific exceptions to the sample agreement, proposers must complete and submit this form. (Sample of the County's Professional Services Agreement is included as Attachment A; Special Terms and Conditions Exhibits is included as Attachment C)

**Proposal Form 3** - Complete and sign to indicate willingness and ability to meet the County's insurance requirements as specified in Attachment B. (Sample Insurance Requirements are included as Attachment B)

## **PART FOUR – PROPOSAL EVALUATION PROCESS**

### **I. PROPOSAL REVIEW AND AWARD PROCESS OVERVIEW**

All proposals received by the specified deadline will be reviewed by the County for content, including, but not limited to, cost, related experience and professional qualifications of the proposers.

The evaluation and scoring component for this RFP will consist of two phases:

- a. A review conducted by County staff to ensure that each proposal meets the minimum qualifications for proposal acceptance outlined below.
- b. Evaluation and scoring of each proposal by a review committee.

County employees will not participate in the selection process when those employees have a relationship with a person or business entity submitting a proposal which would subject those employees to the prohibition of Section 87100 of the Government Code. Any person or business entity submitting a proposal who has such a relationship with a County employee who may be involved in the selection process shall advise the County of the name of the County employee in the proposal.

The County may negotiate modification after the bid/proposal has been selected to assure that all necessary program requirements are covered before the contract is signed.

The selected proposal shall be used as the basis for negotiating the contract's scope of work and budget.

### **II. PROPOSAL DISQUALIFICATION**

Any proposal may be disqualified prior to scoring if:

- a. The proposal is received at any time after the exact time and date set for receipt of proposals.
- b. The proposal is incomplete or fails to meet the minimum qualifications as stated in the RFP.

In the event a proposal is disqualified as described above, written notification will be mailed to the proposer describing the reasons for disqualification.

### **III. MINIMUM QUALIFICATIONS**

County staff will evaluate all proposals received for the following minimum qualifications on a "pass/fail" basis:

- a. The proposal was submitted by the closing time and date.
- b. The proposal was prepared in accordance with the Proposal Submission Requirements.
- c. Proposer has filed its formation document with its respective Secretary of State and is authorized to carry out business activities.
- d. Proposer is not on a federal debarment list. ([www.sam.gov](http://www.sam.gov))

Only those proposals meeting the minimum qualifications will be forwarded for evaluation and scoring by the review committee. If federally funded and only one proposal is received, it will not be forwarded to a review committee, but, at the County's discretion, may be recommended for a single source agreement.

#### IV. PROPOSAL REVIEW COMMITTEE

A review committee will score each proposal that meets the minimum qualifications. As part of the evaluation and scoring process, the review committee may decide to interview proposers in person, via phone or by web-based applications. Travel or other expenses incurred by proposers will not be covered for interviews.

When proposals are being scored and award recommendations are being made, the review committee can only base their scoring and subsequent recommendations on the information contained in the proposals. The review committee members cannot make assumptions, nor consider their personal knowledge or experience, regarding the proposing agencies and/or proposed services. In order to ensure that all proposing agencies are reviewed in a fair and equitable manner and to ensure that no agency is given unfair advantage, the scores and recommendations are based solely on the proposals that are submitted and the manner in which those proposals address the requirements of the RFP.

#### V. EVALUATION AND SCORING

A proposal evaluation system, which includes a point system for rating each proposal, will be used to review all proposals that meet minimum qualifications. This system will ensure uniformity in evaluating proposals and will identify the rationale for funding recommendations. If the proposer cannot respond to a specific question because it has determined that question does not apply to its proposed services, the proposer should specify why it does not apply rather than leaving it blank or unaddressed. Proposals will be evaluated using the following criteria:

- Section I Organization Information - 5 Points
- Section II Qualifications and Experience - 25 Points
- Section III Project Approach and Work Schedule - 15 Points
- Section IV Compliance - 5 Points
- Section V Privacy and Security - 5 Points
- Section VI Fiscal - 5 Points
- Section VII Cost Of Service / Budget - 25 Points
- Section VIII Identification of subcontractors - 5 Points

#### VI. FINALIST INTERVIEWS

After initial screening, the evaluation committee may select those proposers deemed most qualified for this project for further evaluation. Interviews of these selected qualified proposers may be conducted as part of the final selection process. Interviews may or may not have their own separate scoring during the evaluation process.

## VII. SELECTION CONDITIONS

### A. PURCHASING AGENT

The County Department Head in consultation with the Purchasing Agent reserves the right, in their sole discretion, to take any of the following actions at any time before Board approval of an award: waive informalities or minor irregularities in any proposals received, reject any and all proposals, cancel the RFP, or modify and re-issue the RFP. Failure to furnish all information requested or to follow the format requested herein may disqualify the proposer, in the sole discretion of the County. False, incomplete, misleading or unresponsive statements in a proposal may also be sufficient cause for a proposal's rejection.

### B. ADDITIONAL INFORMATION

The County may, during the evaluation process, request from any proposer additional information which the County deems necessary to determine the proposer's ability to perform the required services. If such information is requested, the proposer shall be permitted three (3) business days to submit the information requested.

### C. ERRORS AND CORRECTIONS

An error in the proposal may cause the rejection of that proposal; however, the County may, in its sole discretion, retain the proposal and make certain corrections. In determining if a correction will be made, the County will consider the conformance of the proposal to the format and content required by the RFP, and any unusual complexity of the format and content required by the RFP. If the proposer's intent is clearly established based on review of the complete proposal submittal, the County may, at its sole option, correct an error based on that established content. The County may also correct obvious clerical errors. The County may also request clarification from a proposer on any item in a proposal that County believes to be in error.

### D. SELECTION

The County reserves the right to select the proposal(s) which in its sole judgment best meets the needs of the County and to award to only one or multiple qualified submittals. ***The lowest proposed cost is not the sole criterion for recommending contract award.*** The County also makes no guarantee of any or equal amounts of work. The County of Sonoma further reserves the right to reject any or all proposals for any reason, including, without limitation, County's desire to enter into cooperative purchasing agreements with any other public agency. Selection or award pursuant to this RFP does not obligate the County to enter into an agreement with the selected proposer. The County reserves the right, at its sole discretion, to refrain from executing a contract for any reason, including but not limited to funding availability, legislative or regulatory changes, or a determination that contracting is not in the County's best interest.

#### E. NOTIFICATION OF RFP RESULTS

All proposers responding to this RFP will be notified of their selection or non-selection after the evaluation committee has completed the selection process.

RFP results and information regarding the selected firm(s) will be posted on the [Department of Health Services website](#) providing notification to all interested parties.

#### F. BOARD OF SUPERVISORS

Generally, the firm selected by the Evaluation Committee will be recommended to the Board of Supervisors for this project, but the Board is not bound to accept the recommendation or award the project to the recommended firm.

### **PART FIVE – GENERAL INFORMATION**

#### I. RULES AND REGULATIONS

- A. The issuance of this solicitation does not constitute an award commitment on the part of the County, and the County shall not pay for costs incurred in the preparation or submission of proposals. All costs and expenses associated with the preparation of this proposal shall be borne by the proposer.
- B. Sonoma County reserves the right to reject any or all proposals or portions thereof if the County determines that it is in the best interest of the County to do so.
- C. The County may waive any deviation in a proposal. The County's waiver of a deviation shall in no way modify the RFP requirements nor excuse the successful proposer from full compliance with any resultant agreement requirements or obligations. Sonoma County reserves the right to reject any or all proposals, or to waive any defect or irregularity in a proposal. The County further reserves the right to award the agreement to the proposer or proposers that, in the County's judgment, best serves the needs of Sonoma County.
- D. All proposers submit their proposals to the County with the understanding that the recommended selection of the review committee is final and subject only to review and final approval by the Department Director (via delegation), the County Purchasing Agent or the Board of Supervisors.
- E. Upon submission, all proposals shall be treated as confidential documents until the selection process is completed. Once the notice of intent to award is issued by the County, all proposals shall be deemed public record. In the event that a proposer desires to claim portions of its proposal exempt from disclosure, it is incumbent upon the proposer to clearly identify those portions with the word "Confidential" printed on the top right hand corner of each page for which such privilege is claimed, and to clearly identify the information claimed confidential by highlighting, underlining, or bracketing it, etc. Examples of confidential materials include trade secrets. Each page shall be clearly marked and readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal. The County will consider a

proposer's request for exemptions from disclosure; however, the County will make its decision based upon applicable laws. An assertion by a proposer that the entire proposal, large portions of the proposal, or a significant element of the proposal, are exempt from disclosure will not be honored and the proposal may be rejected as non-responsive. Prices, makes and models or catalog numbers of the items offered, deliverables, and terms of payment shall be publicly available regardless of any designation to the contrary.

- F. The County will endeavor to restrict distribution of material designated as confidential to only those individuals involved in the review and analysis of the proposals. Proposers are cautioned that materials designated as confidential may nevertheless be subject to disclosure. Proposers are advised that the County does not wish to receive confidential or proprietary information and those proposers are not to supply such information except when it is absolutely necessary. If any information or materials in any proposal submitted are labeled confidential or proprietary, the proposal shall include the following clause:

[Legal name of proposer] shall indemnify, defend and hold harmless the County of Sonoma, its officers, agents and employees from and against any request, action or proceeding of any nature and any damages or liability of any nature, specifically including attorneys' fees awarded under the California Public Records Act (Government Code §6250 et seq.) Arising out of, concerning or in any way involving any materials or information in this proposal that [legal name of proposer] has labeled as confidential, proprietary or otherwise not subject to disclosure as a public record.

- G. Requests for records related to this RFP must be submitted using the DHS Public Records Act eForm, which may be found at: <https://sonomacounty.gov/health-and-human-services/health-services/about-us/health-services-public-records-request>

## II. NONLIABILITY OF COUNTY

The County shall not be liable for any precontractual expenses incurred by the proposer or selected contractor or contractors. The County shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

## III. PROPOSAL ALTERNATIVES

Proposers may not take exception or make material alterations to any requirement of the RFP. Alternatives to the RFP may be submitted as separate proposals and so noted on the cover of the proposal. The County reserves the right to consider such alternative proposals, and to award an agreement based thereon if it is determined to be in the County's best interest and such proposal satisfies all minimum qualifications specified in the RFP. Please indicate clearly in the proposal that the proposal offers an alternative to the RFP.

#### IV. STATUS OF CONTRACTOR

The successful proposer will at all times remain to the County, a wholly independent contractor. Neither the County nor any of its agents will have control over the conduct of the Contractor or any of the Contractor's employees, except as otherwise set forth in the awarded Agreement. The Contractor's agents and employees are not and will not be considered employees of the County for any purpose. The Contractor may not, at any time or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of the County. The County has no duty, obligation, or responsibility to the Contractor's agents or employees under the Affordable Care Act. The Contractor is solely responsible for any tax penalties associated with the failure to offer affordable coverage to its agents and employees under the Affordable Care Act and any other liabilities, claims and obligations regarding compliance with the Affordable Care Act with respect to the Contractor's agents and employees. The County is not responsible or liable for the Contractor's failure to comply with the Contractor's duties, obligations, and responsibilities under the Affordable Care Act. The Contractor agrees to defend, indemnify and hold the County harmless for all taxes and penalties that may be assessed against the County because of the Contractor's obligations under the Affordable Care Act relating to the Contractor's agents and employees.

#### V. LOBBYING

Any party submitting a proposal or a party representing a proposer shall not influence or attempt to influence any member of the selection committee, any member of the Board of Supervisors, or any employee of the County of Sonoma, with regard to the acceptance of a proposal. Any party attempting to influence the RFP process through ex-parte contact may be subject to rejection of their proposal.

#### VI. OTHER AGENCIES PROCUREMENTS

The County of Sonoma is soliciting proposals from qualified consultants. While this RFP is prepared on behalf of a Department of the County of Sonoma for execution of one or multiple contracts for these services, these contract(s) may also be used by other divisions/units of the County or other governmental agencies if desired. Any of these entities may procure services from the consultants who have received contracts under this RFP by issuing individual requests under these same terms, conditions, and prices. It is understood that public entities, special districts and nonprofit entities shall make purchases in their own name, make direct payment, and be liable directly to the successful proposer(s). The County of Sonoma is not an agent, partner or representative of these agencies and is not obligated or liable for any action or debts that may arise out of such independently negotiated procurements. The County reserves the right to issue competitive solicitations for any project without the use of the contracts. The County of Sonoma reserves the right to leverage the Request for Proposal and Contract pricing for additional services for other County departments and/or divisions.

## VII. FORM OF AGREEMENT

1. No agreement with the County shall have any effect until a contract has been signed by both parties. Pursuant to Sonoma County Code Section 1-11, County personnel are without authorization to waive or modify agreement requirements.
2. A sample of the agreement is included as Attachment A hereto. Proposers must be willing to provide the required insurance and accept the terms of this sample agreement. With few exceptions, the terms of the County's standard agreement will not be negotiated. Indemnification language will not be negotiated.
3. Proposals submitted shall include a statement that (i) the proposer has reviewed the sample agreement and will agree to the terms contained therein if selected, or (ii) all terms and conditions are acceptable to the proposer except as noted specifically in the proposal. A proposer taking exception to the County's sample agreement must also provide alternative language for those provisions considered objectionable to the proposer. Please note that any exceptions or changes requested to the Agreement may constitute grounds to reject the proposal.
4. Failure to address exceptions to the sample agreement in your proposal will be construed as acceptance of all terms and conditions contained therein.
5. Submission of additional contract exceptions after the proposal submission deadline may result in rejection of the proposal.

## VIII. DURATION OF PROPOSAL; CANCELLATION OF AWARDS; TIME OF THE ESSENCE

1. All proposals will remain in effect and shall be legally binding for at least ninety (90) days.
2. Unless otherwise authorized by County, the selected consultant will be required to execute an agreement with the County for the services requested within sixty (60) days of the County's notice of intent to award. If agreement on terms and conditions acceptable to the County cannot be achieved within that timeframe, or if, after reasonable attempts to negotiate such terms and conditions, it appears that an agreement will not be possible, as determined at the sole discretion of the County, the County reserves the right to retract any notice of intent to award and proceed with awards to other consultants, or not award at all.

## IX. WITHDRAWAL AND SUBMISSION OF MODIFIED PROPOSAL

A proposer may withdraw a proposal at any time prior to the submission deadline by submitting a written notification of withdrawal signed by the proposer or his/her authorized agent. Another proposal may be submitted prior to the deadline. A proposal may not be changed after the designated deadline for submission of proposals.

## X. PROTEST PROCESS

Any and all protests must be in writing and must comply with the timelines and procedures set forth at: <http://sonomacounty.gov/General-Services/Purchasing/Doing-Business-with-the-County/Protests-and-Appeals/>

## XI. LIVING WAGE

The contractor/franchisee/economic development assistance recipient shall comply with any and all federal, state, and local laws – including, but not limited to the County of Sonoma Living Wage Ordinance – affecting the services provided by this contract/franchise agreement. Without limiting the generality of the foregoing, the contractor/franchisee/economic development assistance recipient expressly acknowledges and agrees that this contract/franchise/economic development assistance agreement is subject to the provisions of Article XXVI of Chapter 2 of the Sonoma County Code, requiring payment of a living wage to covered employees. Noncompliance during the term of the contract/franchise/economic development assistance agreement will be considered a material breach and may result in termination of the contract/franchise/economic development assistance agreement or pursuit of other legal or administrative remedies.

The link to the Living Wage Ordinance is: <https://sonomacounty.gov/living-wage-self-certification-for-suppliers>

## PART SIX – FORMS

### I. REQUIRED PROPOSAL FORMS

Include the following Proposal Forms with the proposal. Templates of the following Proposal Forms are located under the references for this RFP through the Sonoma County Supplier Portal

Proposal Form 1: Proposal Cover Sheet and Checklist

Proposal Form 2: Attestation Regarding County Contract

Proposal Form 3: Acceptance of County Insurance Requirements

### II. ATTACHMENTS AND EXHIBITS

Attachment A: Sample Agreement

Attachment B: Sample Insurance Requirements

Attachment C: Special Terms and Conditions - Privacy and Security of Personal and Personally Identifiable Information