



County of Sonoma

REQUEST FOR PROPOSALS (RFP)

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

Consultant Services for Ballot Measure Renewal

**Civic Engagement Strategies, Polling,
Community Outreach and Education,
Feasibility Analyses, and Expenditure Plan Revision**

Proposals must be received no later than 2:00 P.M. on April 9, 2026.

County of Sonoma, Department of Health Services
Behavioral Health 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 Consultant Services for Ballot Measure Renewal including Civic Engagement Strategies, Polling, Community Outreach and Education, Feasibility Analyses, and Expenditure Plan Revision.

The Department is soliciting proposals from qualified consultants, political revenue generation strategists, community organizing or civic engagement management firms for the planning and design of a public outreach strategy in support of the renewal of a ballot measure that will generate revenue to sustain and improve behavioral health and homeless services. Qualified entities must demonstrate organizational capacity and experience with successful civic revenue generation measures.

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, at its sole discretion, to award in any manner determined to be in the best interest of the department including but not limited to, issuing an award under this RFP to a single or multiple individual(s) and organization(s). If the Department determines that no proposer meets the requirements of this RFP, the Department, at its sole discretion, reserves the right to reject any or 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 term of the resultant contract is expected to be up to three (3) years with the option of two (2) one (1)-year extensions. An extension in contract amount and term may be granted depending on available funding and contractor performance, subject to County Board of Supervisors' approval.

II. 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.

Date	Event
February 24, 2026	Release Request for Proposals
March 10, 2026	Pre-Bid Conference

March 18, 2026	Proposer's Questions Due by 5:00 p.m.
March 26, 2026	County's Responses to Questions Due
April 9, 2026	Proposals Due by 2:00 p.m.
April 2026	Proposals Evaluated by County
April 2026	Interviews Conducted (if applicable)
May 2026	Notice of Intent to Award <i>(subject to delay without notice to proposers)</i>
June 2026	Board of Supervisors Awards Contract <i>(subject to delay without notice to proposers)</i>

III. PROJECT BACKGROUND AND DESCRIPTION

In November 2020, Sonoma County voters approved Measure O, a one-quarter-cent sales tax designed to provide essential funding for mental health and homeless services. Passing with 68.07 percent of the vote, the measure now generates over \$30 million annually and will continue through March 31, 2031.

Measure O supports numerous programs across five funding categories:

- Behavioral Health Facilities
- Emergency Psychiatric and Crisis Services
- Mental Health and Substance Use Disorder Outpatient Services
- Behavioral Health Homeless and Care Coordination
- Transitional and Permanent Supportive Housing

Each funding category receives a defined share of revenue as outlined in the expenditure plan. Thousands of Sonoma County residents, along with many family members and loved ones, have directly benefited from Measure O funded services since its inception.

Below are some of the programs supported by Measure O.

The **Sonoma County Healing Center**, a 16-bed Psychiatric Health Facility (PHF) operated by Crestwood Behavioral Health, provides short term hospitalization for adults 18 and older experiencing emergency psychiatric needs. The PHF delivers a higher level of care than outpatient or urgent or crisis clinics and allows clients to remain in the county rather than being placed elsewhere, reducing overall hospitalization costs. More than 500 county residents have received care at this facility.

The **Mobile Support Team (MST)** delivers rapid response, assessment, and community-based stabilization for individuals experiencing behavioral health crises. Using de-escalation and stabilization techniques, the team works to reduce immediate risk, avoid unnecessary

emergency care or hospitalizations, and minimize law enforcement involvement, which is used only when necessary for safety. In its first full year of expanded operations in FY24-25, MST responded to nearly 2,000 calls, and two thirds required no law enforcement engagement.

The **Crisis, Assessment, Prevention and Education program (CAPE)** supports students with mental health and substance use needs and has placed clinicians and counselors in 16 high schools countywide. In the 2024–25 school year, CAPE connected 109 students to appropriate care, responded to 33 on campus crises, hosted 21 informational events reaching nearly 1,500 people, and delivered 37 workshops to 582 students, families, school staff, and community members. Services are available during school hours when students are most likely to need them.

Crisis Residential Treatment Facilities provide housing and mental health services to adults who require longer-term services to stabilize in an unlocked setting. Clients stay for up to 30 days and are connected to treatment, housing, and a safe discharge plan in a trauma-informed, recovery-oriented, homelike setting. This setting prevents hospitalization, resolves client issues in their own community, reduces recidivism into crisis services, and connects clients to treatment at a lower cost (80-92% less expensive than inpatient), and is less restrictive setting than a psychiatric hospital.

The Drug Medi-Cal Organized Delivery System is a California program designed to provide **organized substance use disorder (SUD)** treatment for eligible Medi-Cal members. Thanks to our local Measure O dollars and additional state funding, the Department is now able to serve individuals who are not enrolled in Medi-Cal and address children and youth SUD needs. Looking ahead, the County expects a doubling of residential treatment annually, from 340 to over 700 individuals served, with additional plans to support care coordination and recovery services. This expanded access to care benefits not only insured individuals, but also those who are uninsured or underinsured.

Care Coordination provides multidisciplinary case management and other services to help individuals who have experienced homelessness succeed in permanent supportive housing. It includes two complementary programs: HEART (Homeless Encampment Assistance and Resource Team), which conducts outreach and provides services across Sonoma County encampments, and SOUL (Solving Obstacles for Unsheltered Lives), which supports individuals as they transition into housing by embedding workers in shelters and service sites. Over the past year, the two teams served approximately 250 individuals, helping many move into interim or permanent housing. This includes placements through Project Homekey, the statewide initiative converting hotels, motels, and other properties into housing or shelter. Sonoma County currently operates 312 Homekey beds across seven sites, with two additional sites in development.

Eliza's Village, located at the former County Juvenile Justice Center, provides interim shelter for up to 80 individuals. Stays begin at six months, with the opportunity for two three-month

extensions for participants who engage with case managers and follow housing plans. The program offers residents the stability needed to tackle tasks that are difficult to manage while living outdoors. Over the past year, 56 individuals have been served at this site.

Together, all of these programs demonstrate the significant and lasting impact of Measure O across Sonoma County. By expanding access to mental health care, strengthening crisis response, and providing meaningful pathways out of homelessness, Measure O continues to improve lives and build a healthier, more stable community. These investments will remain essential in meeting the county's most urgent behavioral health and housing needs.

IV. DESIRED GOALS/OBJECTIVES

OVERVIEW

The County seeks to effectively prepare for the renewal of a **quarter-cent sales tax measure** for a future election. This renewal effort will ensure the continued investment in vital community services that support the health, housing stability, and overall well-being of County residents. Through proactive planning, data-driven analysis, and broad stakeholder collaboration, the County aims to position the renewal measure for long-term success and sustained voter confidence.

A. INNOVATIVE COLLABORATION AND STAKEHOLDER PARTNERSHIPS

The County will focus on strengthening partnerships with community stakeholders to build understanding and support for the renewal of the quarter-cent sales tax measure.

Engagement efforts will emphasize the continued need for this dedicated funding to sustain behavioral health, housing, homelessness prevention, and related community services.

Collaborations will be developed with healthcare and behavioral health providers, housing and social service organizations, criminal justice agencies, and the business community. This collaborative approach will ensure that the renewal measure reflects shared community priorities and improves outcomes across interconnected systems of care.

The County's effort will involve multiple departments, including the Department of Health Services, the Community Development Commission, the County Administrator's Office, the Auditor-Controller/Treasurer-Tax Collector, County Counsel, and other safety net and administrative departments.

B. PUBLIC OPINION POLLING AND ANALYSIS

To guide decision-making and measure potential voter support, the County will conduct comprehensive public opinion polling related to the renewal of the quarter-cent sales tax measure. The objective is to assess public awareness of the existing measure's impact, evaluate the likelihood of voter support for its renewal, and test various ballot language and expenditure options to ensure clarity and effectiveness.

The polling process will include the design of a statistically valid survey with a sample size sufficient to ensure a 95 percent confidence level and a ± 5 percent margin of error. Polling

will focus on community attitudes regarding continued funding for behavioral health, housing, and homelessness services. The results will inform outreach strategies and educational materials to ensure voters are accurately informed about the renewal measure's purpose, need, and demonstrated outcomes.

The selected consultant will work closely with the Health Services Director and Measure O Health Planning Manager to design and refine survey instruments, review findings, and develop actionable recommendations.

C. COMMUNITY OUTREACH AND EDUCATION

Based on polling results, the County will implement a strategic outreach and education plan to inform and engage residents and stakeholders. These efforts will focus on communicating the continuing importance and positive impact of the quarter-cent sales tax funding, addressing public concerns, clarifying misconceptions, and building trust and broad-based support for the renewal measure.

All informational and educational materials will be developed in English and Spanish to ensure accessibility and inclusion. The selected proposer will develop a detailed outreach plan, maintain proactive engagement with community members, and promote transparent, two-way communication throughout the process.

D. FEASIBILITY ANALYSIS OF RENEWAL OPTIONS AND EXPENDITURE PLAN

Using polling data and stakeholder input, the County will assess and refine feasible options for the renewal of the quarter-cent sales tax measure. This analysis will inform the design of a clear and accountable expenditure plan that aligns with community priorities and demonstrates fiscal responsibility.

The expenditure plan will identify how continued revenues will be allocated to programs that address behavioral health needs, housing, and homelessness prevention. It will include clear performance and accountability measures and strategies to ensure efficient and equitable service delivery. The goal is to ensure that renewal of the quarter-cent sales tax measure continues to deliver measurable community benefits and maintains public confidence in how these funds are managed and spent.

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.

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. Relevant experience in strategic planning for successful ballot initiatives with public agencies; relevant experience with public opinion polling instruments and analysis to inform engagement planning; relevant experience in community outreach and education across stakeholder sectors and general public.
- b. Experience and qualifications commensurate with this project.
- c. Development and implementation of a work plan(s) for project(s) similar to the scope of work desired for this project.
- d. Demonstrated ability to provide culturally competent services.

VII. CONTRACTOR REQUIREMENTS

Scope of Work

1. Project Management and Workplan

- a. Create a detailed project workplan with timelines, milestones, deliverables, and required Department inputs.
- b. Hold regular check-ins with Department to track progress and document decisions.
- c. Provide monthly written status updates.

2. Strategic Roadmap for Measure O Renewal

- a. Produce a written strategic roadmap outlining key phases for renewal planning.
- b. Identify required expertise, data needs, risks, and decision points.
- c. Deliverable: Roadmap with timeline, roles, sequencing, and recommended strategy options.

3. Stakeholder Outreach and Engagement Planning

- a. Map key stakeholder groups across behavioral health, homeless services, healthcare, cities, business, nonprofit, and community sectors.

- b. Design an outreach and engagement plan that identifies goals, messages, engagement methods, and timelines.
 - c. Deliverable: Stakeholder engagement plan with recommended activities and materials.
- 4. Governance Committee Recommendations**
 - a. Provide recommendations for establishing a stakeholder leadership or advisory structure that can guide renewal planning and secure membership.
- 5. Public Opinion Research**
 - a. Select appropriate baseline and tracking survey instruments.
 - b. Conduct polling, including sampling design, administration, data collection, and analysis.
 - c. Deliverable: Polling report(s) with findings, interpretation, and implications for education and engagement.
- 6. Community Education Strategy**
 - a. Develop a community education plan informed by polling and stakeholder feedback.
 - b. Identify key questions, concerns, sector-specific considerations, and recommended educational materials.
 - c. Deliverable: Community education plan with recommended message themes and collateral needs.
- 7. Expenditure Plan Refresh**
 - a. Support the department in redesigning the Expenditure Plan so that it accurately reflects organizational needs while articulating the investments in a manner that engages voters and conveys a strong return on their tax dollars.
 - b. Deliverable: Expenditure Plan Refresh recommendations
- 8. Compliance**
 - a. Ensure all work complies with legal restrictions on public agency activities related to ballot-measure planning, including limits on advocacy.
 - b. Deliverable: Written confirmation of compliance approach and review of planned activities.

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. LOCAL PREFERENCE

It is the policy of the County to promote employment and business opportunities for local residents and firms on all contracts and give preference to local residents, workers, businesses and consultants to the extent consistent with the law and interests of the public. A Local Service Provider is defined as a business or consultant who has a valid physical address located within Sonoma County from which the supplier or consultant 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. Proposers claiming local preference must complete Proposal Form 5.

For quantitative evaluations of proposals, the locality of the service provider shall be included as an evaluation criterion in RFPs. Extra percentage weighting of 5% shall be provided in the total rating score for local service providers. For qualitative evaluations of proposals, Departments shall consider the locality of consultants or businesses and their sub-consultants along with other criteria identified in the RFP. If there is more than one service provider being considered and the providers are competitively matched in terms of other criteria, local service providers should be selected. If hiring sub-consultants, the County strongly encourages using local service providers.

No contract awarded to a local service provider or business under this policy shall be assigned or subcontracted in any manner that permits fifty (50) percent or more of the dollar value of the contract to be performed by an entity that is not a local business.

More information about the County's purchasing policies can be found on:

<https://sonomacounty.gov/development-services/sonoma-public-infrastructure/divisions/purchasing-working-with-the-county/local-preference>

PART TWO – PROCUREMENT PROCESS

I. PRE-BID CONFERENCE

An optional virtual pre-bid conference webinar will be held online via Zoom on Tuesday, March 10, 2026 at 1:00 PM 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_JHcjMlKlTu6hWPu6eojwDg

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

Subject: Ballot Measure Renewal Consultant – 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, and **not exceed 20 pages**, excluding attachments or additional documentation.
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

Complete and submit Proposal Form 1 – Proposal Cover Sheet and Checklist, 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. In addition to the information provided in Form 1, proposals shall provide the number of years in business, core competencies, and a list of all contracts in effect with the County of Sonoma.
- b. 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.
- c. 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. Provide specific information in this section concerning proposer's experience in the services specified in this RFP. Examples of completed projects, as current as possible, should be submitted, as appropriate. Provide outline and/or samples from previous projects.
- b. **References are required.** Provide Past Performance Questionnaires from three (3) references—ideally funders, partners, or a government agency. **Proposal Form 4: Past Performance Questionnaire** should be completed by those entities for which your organization delivered comparable services (requesting from a County department is acceptable). The County reserves the right to independently solicit past performance information from any source deemed to be in the best interest of the County and utilize the information in the evaluation process to determine proposer's ability to successfully perform the services required and to determine past adherence to contractual obligations.
- c. Disclose any debarment or other disqualification as a vendor for any federal, state or local entities. Proposer must describe the nature of the debarment/disqualification, including where and how to find such detailed information.
- d. **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.

SECTION III PROJECT APPROACH AND WORK SCHEDULE

Proposers must demonstrate knowledge of practices and how to best provide these services.

- a. Provide a preliminary detailed work plan to include process and methodologies for the scope of work desired for this project.

- b. Provide a schedule that assumes a 2028 November election to run the renewal measure. This schedule should contain specific milestones and dates of completion which will be used to set schedules.
- c. Identify the extent of County personnel involvement deemed necessary, including key decision points at each stage of the project.
- d. Provide project organization and staffing, including an organizational chart identifying each member of the firm involved with the project. The chart shall show the organizational structure of the team and the specialty or position of each team member.
- e. Discuss the type of any software that is anticipated to be used in the planning process.
- f. Describe the level of quality control that you recommend for this project. What characteristics define this level of quality?
- g. 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.
- h. Describe the agency's ability and plan to provide culturally competent and responsive services.

SECTION IV COST OF SERVICE / BUDGET

- a. Provide an itemized budget and budget narrative. The proposal's budget shall clearly state ALL of the 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.
- 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.

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 V 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.

SECTION VI ADDITIONAL INFORMATION

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

SECTION VII 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. 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)

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)

Proposal Form 5 - Declaration of Local Business for Services (If applicable)

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 requirements 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 REQUIREMENTS

County staff will evaluate all proposals received for the following minimum requirements 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)

Only those proposals meeting the minimum requirements will be forwarded for evaluation and scoring by the review committee. If 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 funding 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. Proposals will be evaluated using the following criteria:

- Section I Organization Information - 10 Points
- Section II Qualifications and Experience - 35 Points
- Section III Project Approach and Work Schedule- 35 Points
- Section IV Cost Of Service / Budget - 20 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.

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: <https://sonomacounty.gov/development-services/sonoma-public-infrastructure/divisions/purchasing-working-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/development-services/sonoma-public-infrastructure/living-wage>

XII. ARTIFICIAL INTELLIGENCE

The County may consider the use of Artificial Intelligence (AI) technologies to support the services to be provided under the awarded contract. However, any proposed AI technologies and their use must comply with all requirements set forth in the County's Administrative Policy 9-6: Information Technology Artificial Intelligence (AI) Policy, including human oversight to review output, restrictions on use of confidential, restricted, or protected data, and legal compliance. That policy is available [here \[hyperlink\]](#). County pre-approval must be obtained for use of AI on the awarded contract and County reserves all rights with regard to reviewing any proposed AI use, including but not limited to comprehensive reviews of the AI technologies' security, privacy, ethical use, and legal compliance prior to approval, in County's sole discretion.

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

Proposal Form 4: Past Performance Questionnaire

Proposal Form 5: Declaration of Local Business for Services (If applicable)

II. ATTACHMENTS AND EXHIBITS

Attachment A: Sample Agreement

Attachment B: Sample Insurance Requirements

Attachment C: Sample Invoice