

COUNTY OF MARIN



Department of Health and Human Services Aging and Adult Services

REQUEST FOR PROPOSAL (RFP)

OLDER AMERICANS ACT TITLE III B LGBT SUPPORTIVE SERVICES FOR OLDER ADULTS

RFP-HHS-2021-16

DATE ISSUED:

Monday, August 30, 2021

DEADLINE FOR SUBMISSIONS:

Monday, September 27, 2021 at 12 p.m.

THE COUNTY OF MARIN HEALTH AND HUMAN SERVICES DEPARTMENT DOES NOT DISCRIMINATE ON THE BASIS OF SEX, RACE, COLOR, RELIGION, AGE, SEXUAL ORIENTATION, DISABILITY, MARITAL STATUS, NATIONAL ORIGIN, CITIZENSHIP STATUS, GENETIC INFORMATION, GENDER IDENTITY AND EXPRESSION, AIDS/HIV, MEDICAL CONDITION, POLITICAL AFFILIATION, MILITARY OF VETERAN STATUS, OR STATUS AS A VICTIM OF DOMESTIC VIOLENCE, ASSAULT, OR STALKING IN EMPLOYMENT OR IN ITS EDUCATIONAL PROGRAMS AND ACTIVITIES. REQUESTS FOR DISABILITY ACCOMMODATIONS MAY BE MADE BY PHONING (415) 473-4381(VOICE), CA RELAY 711 OR BY E-MAIL AT DISABILITYACCESS@MARINCOUNTY.ORG.

**COUNTY OF MARIN, AGING AND ADULT SERVICES
 REQUEST FOR PROPOSAL (RFP) TIMELINE
 TITLE III B SUPPORTIVE SERVICES PROGRAM
 Control # RFP-HHS-2021-16**

RFP date of issuance	Monday, August 30, 2021
Bidder's conference	<p>Friday, September 3, 2021 Time: 10 a.m. – 12 p.m.</p> <p>Location: Zoom Teleconference (click link to join) – Zoom Bidders Conference</p> <p>Meeting ID: 915 9864 6015 Passcode: 425942</p> <p>Call-in: 669-900-6833</p>
RFP Q & A (online submission only)	Monday, September 6 – Monday September 20, 2021 at 4 p.m. Access at https://www.marinhhs.org/rfp/2021-16
RFP response submission deadline	Monday, September 27, 2021 at 12 p.m. PST
Applicant award notification	Wednesday, October 6, 2021
Protest submission deadline	Wednesday, October 13, 2021 at 4 p.m.
Public Announcement at Commission on Aging meeting	Thursday, November 4, 2021 at 11:15 a.m.
Initiation of services	Monday, November 1, 2021

**REQUEST FOR PROPOSAL
TO PROVIDE TITLE III B LGBT SUPPORTIVE SERVICES
FROM NOVEMBER 1, 2021 THROUGH JUNE 30, 2022**

Marin County Department of Health and Human Services (HHS), Office of Aging and Adult Services (AAS) is issuing a Request for Proposal (RFP) to seek qualified public or nonprofit providers for the provision of the federal Older Americans Act (OAA) Title III B Support Services Program. Funds for Title III B are contingent upon the availability of federal, state, and local funds. The Title III B Supportive Services RFP may be found at [Department of HHS RFP website](#).

Only one proposal may be submitted from a single agency. Collaborative proposals that show a strong inter-agency partnership to develop a robust program that does not lead to duplicative or fragmented services are highly desirable. The proposal must also identify strategies to reach lesbian, gay, bisexual, transgender (LGBT) individuals, people of color, low-income and previously underserved communities as relevant to the services being proposed.

When preparing a proposal in response to this request, please:

- ✚ Carefully read the entire RFP document before you start.
- ✚ Attend the Bidders' Conference, as noticed in this document. However, all applications received by the submission deadline will be considered regardless of whether the applicant attends the Bidder's Conference.
- ✚ Make sure that all procedures and requirements of the RFP are accurately followed and addressed.
- ✚ Carefully review the entire proposal prior to submittal and use the checklist provided in this RFP to make sure everything has been completed as instructed.
- ✚ Submit a complete proposal by the required deadline.

I. INTRODUCTION

A. About Marin County Aging and Adult Services (AAS)

The Marin County Office of AAS is a major branch within the Marin County Department of Health and Human Services (HHS). AAS acts as the Area Agency on Aging (AAA) and works closely with the Marin County Commission on Aging (MCCOA), a 23-member advisory council representing supervisorial districts, towns and cities of Marin, and the California Senior Legislature. In partnership with the MCCOA, AAS has the overall responsibility of planning, coordinating, administering funding, and advocating for a comprehensive and integrated community-based service system to meet the needs of older persons in Marin County. In addition to the AAA, AAS oversees the Long-Term Care Ombudsman, Adult Protective Services, and In-Home Support Services programs.

B. About the Planning and Service Area

The State of California is divided into 33 Planning and Service Areas, or PSAs, for the administration of the OAA and Older Californians Act. In each PSA, a single agency has been designated as its AAA charged with the responsibility of fulfilling the statutory mandates contained in both Acts. Marin County is designated as PSA 5 with its AAA administered by AAS. The County Board of Supervisors serves as its board of directors.

II. PROGRAM DEFINITIONS

Supportive Services is defined in Title III, Part A Section 301(A-D) of the federal OAA as fostering the development and implementation of comprehensive and coordinated systems to serve older individuals by entering into new cooperative arrangements for the planning and provision of supportive services and multipurpose senior centers, in order to:

- Secure and maintain maximum independence and dignity in a home environment for older individuals capable of self-care with appropriate supportive services;
- Remove individual and social barriers to economic and personal independence for older individuals;
- Provide a continuum of care for vulnerable older individuals;
- Secure the opportunity for older individuals to receive managed in-home and community-based long-term care services.

A. Eligible Service Population

Services must target older adults aged 60 years and above living in Marin County, with attention to low-income older individuals, including low-income minorities, persons with limited English-proficiency, and rural residents Selected Applicant(s) must ensure provision of programs and services to all classes that are protected by State and Federal law.

B. Priority Populations

The 2019 [Older Adults Needs Assessment](#) that informed the 2020-2024 Area Plan conducted by the AAA is instrumental in informing the service priorities sought in this RFP to address the needs and issues of concern expressed by older adults in Marin. The California Code of Regulations (CCR) Article 3, Section 7312 requires the AAA to allocate an adequate proportion of federal funds to provide services in the Title IIIB program categories of Access, In-Home Services and Legal Assistance.

According to the 2014-2019 American Community Survey, there are 76,000 persons over

the age of 60 in Marin.¹ This represents 29% of the population of the county. Of Marin’s population which is currently age 60 and older, 43% live alone. Marin’s older adults mostly identify as Caucasian at 90%. Five percent identify as Asian and 1.5% as Black or African American with 4.7% percent identifying as Hispanic or Latino ethnicity.² The 2019 AAA Needs Assessment Study found that four percent of older adults in Marin identify as being LGBT.³

Aligning with the Marin County HHS Department’s Strategic Plan to Achieve Health and Wellness Equity ([HHS Equity Plan](#)), the AAA seeks proposals that will serve older adult persons of color proportionally to the racial/ethnic makeup of Marin County’s older adult population. The HHS Equity Plan is built upon the Marin County Board of Supervisors’ definition of equity: *Just and fair inclusion in the County where all can participate, prosper, and reach their full potential. Equity efforts seek to rectify historic patterns of exclusion.*

Moreover, the Marin County AAA’s [Older Adults Needs Assessment](#) found significant disparities between older adult persons of color and their Caucasian counterparts. Some of these disparities were around food insecurity, employment and unemployment, caregiving and whether individuals feel they are respected members of their community.

Many LGBT older adults also face similar disparities and have lived through discrimination, social stigma and violence. For some members of the LGBT community, fear and social stigma have disrupted their lives, their connections with their families of origin, their lifetime earnings, and their opportunities to save for retirement. The effects of a lifetime of stigma, discrimination, and violence put LGBT older adults at greater risk for physical and mental illnesses. These effects can include: social isolation, depression and anxiety, poverty, chronic illness, delayed care seeking, poor nutrition, and premature mortality. In addition to poor health outcomes, research also suggests that LGBT older adults are less likely than heterosexual, and/or cisgender older adults to access mainstream aging services and providers, senior centers, meal programs, and other services because they fear discrimination or harassment.⁴

The funding allocated in this RFP is to be targeted to serve LGBT older adults, yet services shall be open and accessible to persons over 60.

III. AVAILABLE FUNDING AND PRIORITY AREAS

¹ American Community Survey 5-year Estimates (2014-2019). Population 60 Years and over in the United States, Marin County.

² American Community Survey 5-year Estimates (2014-2019). Population 60 Years and over in the United States, Marin County.

³ Marin Older Adult Needs Assessment Study. Davis Research. 2019. Available at: [Marin County Older Adult Needs Assessment \(marinhhs.org\)](#)

⁴ National Resource Center on LGBT Aging. “Inclusive Questions for Older Adults.” Available at: [lgbtagingcenter.org](#)

Available Funding

OAA Title III B Supportive Services funds in the estimated amount of **\$20,000** are available for a comprehensive program for the 8-month period of November 1, 2021 to June 30, 2022. Funding is estimated to be **\$30,000 per year for each of the next two years (12-month periods)**.

Proposal narratives must be accompanied by a clear, concise and reasonable budget for **each** proposed service category for the grant period November 1, 2021 to June 30, 2022 using the budget form provided in this RFP.

Funding Priority Areas

Marin County AAS is seeking qualified home- and community-based not-for-profit or public agencies to provide programs that will respond to the identified needs of LGBT older adults in Marin County. Results of the quantitative Marin County AAA's [Older Adults Needs Assessment](#) guided the prioritization of services in this RFP as described below. These areas should be prioritized for funding to respond to the most pressing service needs identified in the [Older Adults Needs Assessment](#). This RFP seeks applicants that can show their ability to develop approaches and programs in these priority areas as described below.

This RFP also encourages bids that demonstrate the ability to provide services (as appropriate) in alternative formats, such as online or via teleconference, given the unknown duration of the current or any potential future of state and local public health orders for older adults.

Applicants must select **two or more** of the following service categories and indicate the number of units to be provided and the associated amount of funding requested for those units of service. One applicant will be awarded total amount of allocated funding. A separate budget (and full proposal) is required for each service proposed.

Definitions:⁵

- Non-Registered Services: Services where it is not practical to collect client specific information or where requiring the client to register may serve as a barrier to receiving a service.
- Registered Services: Services with data collection and reporting requirements, including unduplicated client counts by characteristic, units of service, and Assistance with Daily Living criteria.

1. PRIORITY AREA: ACCESS⁶

⁵ California Department of Aging Data Dictionary. Available at: <https://www.aging.ca.gov/download.ashx?IE0rcNUV0zYVluwocgk52g%3D%3D>

⁶ Ibid.

Service Category: Outreach (non-registered service)

This service provides interventions (one-on-one contacts) with individuals initiated by an agency or provider for the purpose of identifying potential clients (or their age 60+ caregivers) and encouraging their use of existing services and benefits. A contact is defined as a phone call, email, in-person or online presentation with one or more identified persons. *Unit of service = 1 contact.*

Service Category: Information and Assistance (non-registered service)

This service (A) provides individuals with information on services available within the communities; (B) links individuals to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures. Internet web site "hits" are to be counted only if information is requested and supplied, and (C) is satisfied. Maximum extent practicable includes offering a follow-up call to all individuals who were linked to a service. Individuals can remain anonymous and refuse a follow-up call. *Unit of service = 1 contact.*

2. PRIORITY AREA: IN-HOME SERVICES⁷

Service Category: Telephone Reassurance (non-registered service)

This service requires telephoning a client to provide contact and safety checks to reassure and support older adults. *Unit of service = 1 contact.*

Service Category: Visiting (non-registered service)

This service requires visiting clients to provide contact and safety checks to reassure and support older individuals. It provides an informal support service to frail, isolated older adults living independently. *Unit of service = 1 hour.*

3. OTHER SERVICES⁸

Service Category: Senior Center Activities (non-registered service)

Services designed to enable older individuals to attain and/or maintain physical and mental well-being such as recreation, music, creative arts, physical activity, education, leadership development and other supportive services not covered under other service categories. Development and provision of new volunteer opportunities and services, and creation of additional services and programs to remedy gaps and deficiencies in existing services. Entertainment costs such as tickets to shows or sporting events, meals, lodging, rentals,

⁷ Ibid.

⁸ Ibid.

transportation and gratuities are not allowable. Arranges or provides organized art, educational, health, recreational, social, and volunteer opportunities for older persons 60 years and older in order to promote their wellness and enhance their quality of life. Applicant does not have to be a designated Senior Center to apply. *Unit of service = 1 hour.*

Service Category: Peer Counseling (registered service)

This service uses the skills and/or life experiences of trained volunteers, under qualified supervision, to provide advice, guidance, and support in a self-help approach in order to enhance well-being and enable clients to make informed choices. *Unit of service = 1 hour.*

IV. CONTRACTING PERIOD AND PROVISIONS

A. Eligibility and Contract Period

Any private, nonprofit, or government entity that can meet the goals, standards, policies, and contracting requirements of AAS for providing services in Marin, as described in this Request for Proposal, is eligible to apply.

The contract period will be November 1, 2021 through June 30, 2022. Annual contract renewals for each of the next three years will be contingent on success in providing services and meeting contracted goals for each of the prior contract periods. All contract requirements noted herein and all contract provisions in the standard contract shall apply. By submitting an application, the applicant agrees to be bound by all terms and conditions of the County’s standard contract, and execute the same, if selected. An authorized representative of the successful applicant shall be required to sign the County standard agreement.

Collaborative proposals with a single organization that has subcontract arrangements for specifically defined units of service with other agencies are highly encouraged. In this situation, the primary contracting agency must monitor and hold all subcontractor agencies to the same provisions set forth in the standard contract. AAS may negotiate changes to the project narrative and budget after the selection process is completed, but before the contract is signed, to assure that all program and fiscal requirements are covered.

B. Matching Requirements

Matching contributions mean local cash and/or in-kind contributions by the contractor, subcontractor, or other local resources (referred to as non-matching contribution) that qualify as match for the contract funding. The required minimum program matching contributions for Title III B Supportive Services is 10.53%. Minimum matching requirements are calculated on net costs, which are total costs less program income and non-matching contributions.

C. Use of Funds in Addition to Supportive Services Funds

Title III B Supportive Services funding generally does not cover all costs of providing a service or program. It is an incentive funding and may require other sources to support the program. Proposals will receive points based on their ability to provide adequate support for the program.

D. Contributions for Services

Regulations under Title III of the OAA require that each service provider provide an opportunity for persons to contribute to the cost of the service. Contributions must be voluntary, and no service can be denied if an individual will not or cannot contribute to the cost of the service. These contributions will be recorded as program income and must be used to pay for current allowable costs of the program in the same fiscal year that the income was earned. Fees, including sliding fee scales, cannot be charged for Title III B services. Applicants applying for funds must have an established system for collecting contributions and include that system as part of the application. New applicants must develop and indicate in the proposal a system for collecting donations.

E. Program Materials

All publications and written and digital communications, including e-newsletters, organizational websites and social media, materials developed by the program must include the following statement: "Funding for this program is made available, at least in part, by the Marin County Area Agency on Aging."

F. Supplanting other Funds

Funds available under the Supportive Services portion of the Older American's Act shall supplement and not supplant any federal, state or local funds. These funds are meant to expand services to caregivers and to reach previously un-served communities.

G. Applicable Laws and Regulations

Proposals shall conform to all applicable provisions of laws and regulations, including, but not limited to, the OAA of 2006 as amended, the Civil Rights Act, the Americans with Disabilities Act, the Older Californians Act, and applicable federal, state and local laws, codes ordinances and regulations, as well as the terms and conditions required by the original funding sources for the programs and services described by this RFP and the terms and conditions of the County's standard contract. These references are available at the AAS office for review upon request.

H. Coordination Requirements

Coordination with local providers of similar and related services for caregivers is required, both in planning and implementing the service. Successful applicants should be willing to share information with, and provide referrals to, other service providers, including

cooperation and coordination in obtaining client authorization for release of confidential information. AAS further requires that coordination activity be documented in the application and in appropriate reports for funded programs. Collaborative applications are encouraged and must include Letters of Support from partner agencies that will be subcontracted for services proposed.

Promotion of AAS' Information and Assistance unit is required. Successful applicants must be willing to share information, and work to create a strong system of the aging service network. This should be documented fully in the application form.

I. Reporting and Monitoring Requirements

All successful applicants shall utilize computerized data reporting systems (e.g. California GetCare/California Aging Reporting System) to comply with the California Department of Aging, Administration on Aging, Aging Program Information System, and AAS reporting requirements. Service and financial reports must be submitted by the due date of each month determined by AAS.

All successful applicants shall maintain statistical and financial data in such a way as to document and assure the accuracy of the data presented in the required program and financial reports.

AAS may conduct one or more of the following activities for program monitoring: review cases, conduct site visits, interview a random sample of clients who have received the service, interview agency staff and volunteers, interview other agencies who provide services to the same target population, and any other method deemed necessary. Fiscal monitoring will also be done and include one or more of the following activities: case review, site visits, desk audit, and yearly contract resolution. Applicants will cooperate with AAS in any evaluation techniques in order to improve program performance and comply with federal, state and local regulations.

J. Maintenance of Performance Levels

For all services funded by the Title III B Supportive Services, each successful applicant shall maintain the contracted units of service level throughout the contract period. Unless there are extenuating circumstances, for each quarter in which the performance is reviewed, the number of units served shall not fall below **90%** of the level expected for the period being monitored. Should performance fall below the 90% expected service level for the period, the contractor may be required to submit a written Plan of Action to AAS within 15 days of receiving the monitoring report from AAS, detailing specific steps to be taken, including time frame, to remedy performance. If the contractor fails to fulfill the contracted unit of service level within that time frame, AAS may institute sanctions as described in AAS' Sanction and Hearing Policy (see section XVI).

K. Audit Requirements

An annual audit by a Certified Public Accountant must be delivered to AAS within 120 days after the end of your organization's fiscal year. This is an allowable program expense (up to a maximum of \$600) and should be reflected as a line item in the detailed budget. For all new applicants, please submit a copy of the most recent financial audit with the application.

V. APPLICATION PROCEDURE

Grant applications will be available online and in person starting **Monday, August 30**.

Applications may downloaded here: <https://www.marinhhs.org/rfp/2021-16>

Applications may be picked up between 8:30 a.m. and 4:30 p.m. at the following office:

Aging and Adult Services – Reception Desk (first floor)
10 N. San Pedro Road
San Rafael, CA 94903

Questions regarding the RFP may be directed at the online Bidder's Conference, scheduled for **Friday, September 3, from 10 a.m. – 12 p.m.** via Zoom conference:

<https://zoom.us/j/91598646015?pwd=c2E3aEkweVgzNDBsdStsWUZnRUcxQT09>

Meeting ID: 915 9864 6015. Passcode: 425942.

Phone call-in: 669-219-2599

Absence from the Bidder's Conference will not disqualify potential applicants from submitting a proposal. Answers to questions asked during the Bidder's Conference will be posted on the AAS website within 48 business hours. Subsequent questions from bidders may also be sent via internet to [Department of HHS RFP website](#) until **Monday, September 20, at 4 p.m.** Questions will be answered and posted on the website within 48 business hours. No telephone questions will be accepted or considered. Please refer to specific paragraphs and pages in the RFP when asking questions.

No individual assistance or consultation will be provided by AAS staff or COA members other than responses to questions posted on the website referred to above. During the period from issuance of this RFP and the award of the contract to a successful applicant(s), contact regarding the specific subject of this RFP between potential or actual applicant(s) and County staff is restricted under the terms of this section. Except as otherwise expressly authorized in this RFP, neither applicant nor County staff shall discuss, question or answer questions, or provide or solicit information, opinion, interpretation, or advocate or lobby regarding this RFP. A documented instance of such contact by an actual or potential applicant shall be grounds for disqualification from the process. County staff shall be defined as any County employees, agents or contractors involved in or connected with this RFP process.

Applications can be submitted in person or online. All **Applications must be received by 12 p.m. on Monday, September 27.**

To submit an application online, visit <https://www.marinhhs.org/rfp/2021-16>.

To submit in person or via a courier service, **deliver response packages, as described in Section VII below, to Aging and Adult Services office at 10 North San Pedro Road, Reception, Attn.: Amy Dietz.** To drop off or send via a courier service, proceed to the reception area of AAS' office. The office is open Monday thru Friday from 8:30 a.m. to 4:30 p.m. Hand-delivered proposals will be issued a note certifying the receipt of the application. Mailed applications must be received in the AAS office by the deadline, not the date stamp of mailing. Applicant will receive an e-mail notification from AAS confirming the receipt of the proposal and the date it was received. Applications received after the deadline will automatically be disqualified from the proposal review and funding process. No verbal proposals will be considered.

VI. MINIMUM QUALIFICATIONS

Applicants shall possess all of the following minimum qualifications:

- A minimum of two years providing the same or similar services to those sought in this RFP.
- A minimum of two years serving the target population.

VII. CONTENT OF THE RESPONSE PACKAGE

Whether submitting online or in person, a complete request for proposal application package must be included. Proposals that do not follow instructions and/or fail to respond to all parts of the RFP shall be deemed non-responsive and will not be considered. The County will not accept any amendments, clarifications, revisions or alterations after the proposal due date unless the changes are requested by the County.

If submitting a hard-copy proposal, the application package must include an original, four copies, and an electronic copy saved in a USB device or CD. A separate application package must be completed for each service bid.

Proposals received with insufficient copies cannot be properly disseminated to the evaluation committee and other reviewers for necessary action and therefore will not be processed. Faxed copies are not accepted.

All proposals – online or hard copy -- must be on letter size 8 ½” by 11” paper, with font no smaller than 12 point. The County may in its discretion accept or reject in whole or in part any or all proposals, may cancel, amend or reissue the RFP at any time prior to contract approval and may waive any immaterial defect in a proposal. The County's waiver of an

immaterial defect shall in no way modify the proposal requirements or excuse the applicant from full compliance with the objective if awarded the contract.

If submitting proposal online, upload all required documents here:

<https://www.marinhhs.org/rfp/2021-16>

The application package must contain all of the following items and must be presented in the order listed below:

A. Application Face Sheet (Attachment A)

Complete the Application Face Sheet of this RFP. Include the completed Face Sheet with each copy of a complete application packet. The Face Sheet includes an Application checklist. Applicants must complete the checklist and ensure that all required documents are provided in the response package.

B. Narrative Responses (Attachment B)

Using the Narrative Responses Form of this RFP, respond to the questions and information requested in order to describe the Applicant's capacity to administer LGBT Supportive Services and successfully fulfill its requirements and deliver the services. Narrative responses should be provided directly on the Narrative Response Form and must not exceed 12 pages total, including the form itself. If the total number of pages exceeds the parameters stated herein, the additional pages will be discarded and will not be reviewed.

C. Program Budget

Using the [Sample IIIB Budget Template](#) of this RFP, provide a breakdown of all the costs associated with providing the services proposed in the application. In addition to the grant being sought from the County, identify other funding sources to cover all costs outlined in the budget. One budget must be submitted for each proposed service.

Matching Contributions mean local cash and/or in-kind contributions by the Applicant, subcontractor, or other local resources that qualify as match for the contract funding. Cash and/or in-kind contributions may count as match, if such contributions are used to meet program requirements. Matching contributions must be used for allowable costs in accordance with the Office of Management and Budget (OMB) circulars. Matching Contribution for Supportive Services is 10.53%.

Non-Matching Contributions mean local funding that does not qualify as matching contributions and/or is not being budgeted as matching contributions. (e.g., federal funds overmatch, etc.).

D. Letters of Support

Include a minimum of two letters of support from partner organizations. The letters of support should highlight the partnership of the recommender with the Applicant, citing specific examples of projects and efforts to coordinate services and improve clients' access to local resources.

VIII. EVALUATION CRITERIA AND SELECTION PROCESS

Proposals will be evaluated based on the following criteria:

- A. Organizational Capacity (25 points maximum): history, experience, and capacity of the organization providing similar services to the target population.
- B. Program Design and Approach (55 points maximum): planned services, goals and objectives of proposed program, evaluation strategies, outreach and marketing, service to targeted populations, including LGBT older adults and older adult persons of color in proportion to the racial/ethnic makeup of Marin County's older adult population.
- C. Administrative and Fiscal Qualifications (20 points maximum): cost effectiveness and efficiency of the services proposed.

Proposals received in response to this RFP will be evaluated in several stages. Staff will initially screen the proposals to assure compliance with all requirements of the RFP and all relevant federal and state laws. Proposals not meeting the minimum requirements shall be deemed non-responsive and will be automatically disqualified.

An evaluation committee comprised of parties with knowledge of the needs of older adults and knowledge of the services intended in this RFP will review and score proposals that pass the initial screening according to the criteria and assigned points specified above. The committee shall not include AAS staff or potential contractors and no committee member may apply or assist others in applying for this contract. The County reserves the right to seek clarifying or additional information from applicants, potentially including site visits or agency interviews. Committee members will score each application based on the criteria and score sheet at the end of this RFP. All committee members scores will be tallied, and the committee's highest scoring bidder will be recommended to the Director of AAS who will make the final decision on the winning bidder. An applicant may not be recommended for funding, regardless of the merits of the application submitted, if it has a history of contract non-compliance with the requirements of Marin County Department of HHS or other funding source or poor past or current contract performance with any HHS or other funding source. The applicant may be given a provisional award with the stipulation that special terms and conditions regarding the areas of concern will be a part of the contract.

Following the evaluation and selection process, staff will negotiate with successful respondents to determine the contract terms and conditions. County reserves the right to reject or to seek modification of any offer if, at the County's sole discretion, the offer does not meet the overall service and performance objectives. No award is final until the County of Marin approves the funding and the respondent has an executed contract.

IX. NOTICE OF AWARD AND POST AWARD

Contract award will be announced on **Wednesday, October 6, 2021**. All Applicants will be notified of the award decision by e-mail with a hard copy to follow by post.

Once the notice of award has been issued, the provider(s) selected will be contacted to execute the County's standard contract. At that time, the selected provider(s) and the County may discuss adjustments to the budget and the scope of work. No other provisions of the County's standard contract will be negotiated. Refer to Section XVI.iv., for a copy of the same.

All applicants awarded a contract under this bid process will be required to adhere to the reporting requirements set forth by AAS, as well as to provide any additional data needed to satisfy other County, state or federal reporting requirements.

Award of a contract under this process does not preclude the County from conducting another RFP process for these services at a future date.

X. PROTEST PROCEDURE

Within five calendar days of the issuance of a notice of intent to award the contract, any Applicant that has submitted a proposal and believes that AAS has incorrectly selected another Applicant for award may submit a written notice of protest. The notice of protest must include a written statement specifying in detail each and every ground asserted for the protest. The protest must be signed by an individual authorized to represent the Applicant, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the Applicant must specify facts and evidence sufficient for the County to determine the validity of the protest.

A. Delivery of Protest

All protests must be submitted in writing and received by 4 p.m. on Wednesday, October 13 by email to lpullen@marincounty.org or at the following address:

Marin County Department of Health and Human Services,
Aging and Adult Services
10 North San Pedro Road
San Rafael, CA 94903
Attention: Lee Pullen, AAA Director

If a protest is mailed, the Applicant bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the County received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered.

B. Protest Decision

The appeal will be reviewed by Lee Pullen, Director, AAA/AAS. The decision of the Director on the protest is final and will be sent to the protesting Applicant by email with a hard copy to follow by post.

XI. COSTS OF PREPARING AND OWNERSHIP OF PROPOSALS

Costs for developing proposals are solely the responsibility of applicants. The County will not provide reimbursement for such costs. The proposal documents shall become the property of the County upon submission.

XII. CONFIDENTIALITY

Applicants acknowledge and agree that the County is a public agency subject to the disclosure requirements of the California Public Records Act (“CPRA”). If Applicant’s proprietary information is contained in documents or information submitted to the County, and Applicant claims that such information falls within one or more CPRA exemption, the Applicant must clearly mark such information “CONFIDENTIAL AND PROPRIETARY” and identify the specific lines containing such information.

In the event of a request for such information, County will make reasonable efforts to provide notice to Applicant prior to any disclosure. If Applicant contends that any documents are exempt from the CPRA and wishes to prevent disclosure, then Applicant is required to obtain a protective order, injunctive relief or other appropriate remedy from a court of law in Marin County before the County’s deadline to respond to the CPRA request. If Applicant fails to obtain such remedy, County may disclose the requested information without penalty or liability.

Applicant further agrees that it shall defend, indemnify and hold County harmless against any claim, action or litigation (including but not limited to all judgments, costs, fees and attorneys’ fees) that may result from denial by County of a CPRA request for information arising from any representation, or any action (or inaction) by the Applicant.

XIII. MOST FAVORABLE TERMS AND INCORPORATION OF PROPOSAL

The County and AAS reserve the right to make an award without further discussion of the proposal submitted. Therefore, proposals should be submitted initially with the most favorable terms that the applicant can propose. After submission of the application and closing of the application period, no information other than what is outlined in this RFP will be released, until an award becomes final. Applicants should be prepared to accept the terms of this RFP for incorporation into any contract resulting from the RFP, as well as any terms and conditions required by the state and federal laws for this RFP.

XIV. LIMITATIONS AND COUNTY RESERVATION OF RIGHTS

This RFP does not commit the County to award a contract or to procure or contract for services, and is in no way an agreement, obligation, or contract between County and any applicant. At its discretion, County reserves the right to accept or request any proposal or all proposals submitted in response to this RFP, or to cancel in part or in its entirety this RFP if it is in County's best interest to do so. The County reserves the right to split the award in any manner deemed most advantageous to the County, as well as to increase or decrease the award amount.

In an effort to reach a decision concerning the most qualified applicant, the County reserves the right to evaluate all factors it deems appropriate, whether or not such factors have been stated in the RFP.

The County reserves the sole right to interpret, change or terminate any provision of the RFP at any time prior to the submission date. Any such interpretation or change shall be in the form of a written addendum and shall become part of the RFP. The County also reserves the right to accept and reject any or all of the RFP, cancel the RFP in whole or in part, or terminate the process and elect to operate by other means.

XV. ADMINISTRATIVE AND LEGAL REQUIREMENTS

- A. Jurisdiction and Venue:** All matters related to this RFP and any subsequent contract shall be governed by and in accordance with the substantive and procedural laws of the State of California and venue shall be in the County of Marin.
- B. Non-Appropriations:** The County's performance and obligation to fund the contract arising from this RFP process are contingent upon the availability of funds from the sources identified in this RFP. Should these funds not be appropriated or otherwise made available to County, any contract entered into pursuant to this RFP will be terminated with respect to any payments for which such funds are not available.
- C. Anti-Discrimination:** The County does not discriminate on the basis of sex, race, color, religion, disability, gender, marital status, or nation origin in employment or in its educational programs and activities. All matters and subsequent contract will comply with the anti-discrimination and anti-harassment mandates of all Federal, State and local statutes, regulations and ordinances including but not limited to County of Marin Personnel Management Regulation (PMR) 21.
- D. Insurance:** The County requires that all contractors carry \$1,000,000 in liability insurance (\$2,000,000 aggregate). The County must be named as additional insured, and specific language must be included on the signed endorsement to the policy. The required insurance coverage requirements include automobile insurance and is described in the County of Marin's Standard Professional Services Contract, (refer to Section XVI; List of Attachments and Links). *It is strongly suggested that applying entities be certain of the ability to secure this insurance and verification prior to submitting an Application.*

- E. Payment:** Contractor's payment will be made following county's receipt of a timely, accurate and accepted invoice to be submitted no later than the 10th of the following month. Services will be reimbursed according to a fee for service model for contracted services provided on the monthly invoices, not to exceed the total contract amount. It is the responsibility of the contractor to track expenditures and any services provided by contractor and/or subcontractors. Expenses that exceed the annual allocation will not be reimbursed.
- F.** Applicant must be legally authorized to conduct business in the State of California and have established administrative and program resources to provide services in Marin County. The applicant must also have appropriate federal, state and local permits or certifications necessary to perform the services that are the subject of this RFP.
- G.** Prior to executing a contract, the applicant (and any subcontractors/partners) must be able to provide the following written policies and procedures that comply with and are otherwise acceptable to the federal, state and local statutes, laws, regulations, and ordinances:
 - a. Conflict of interest policy for staff and governing boards.
 - b. Grievance procedure for customers and clients.
 - c. Does not discriminate against nor deny employment or services to any person on the grounds of race, color, religion, sex, origin, age, disability, citizenship, political affiliation or belief.
 - d. Complies with the 1990 ADA.
- H.** Applicants must have proven fiscal capacity including capacity for fund accounting.
- I.** Applicants must have access to non-County funds sufficient to cover any disallowed costs that may be identified through the audit process.
- J.** Applicants must agree that state, federal, and local monitors or auditors may review provider facilities and relevant financial and performance records to ensure compliance with funding requirements.
- K.** Applicants must be eligible to receive Federal funds.
- L.** Applicants must have the demonstrated ability to collect outcome data, which measure performance to plan.
- M.** If applicable, Contractor shall maintain medical records required by the California Code of Regulations. Notwithstanding the foregoing, Contractor shall maintain beneficiary medical and/or clinical records for a period of ten (10) years, except that the records of persons under age eighteen (18) at the time of treatment shall be maintained: a) until one (1) year beyond the person's eighteenth (18th) birthday or b) for a period of ten (10) years beyond the date of discharge, whichever is later.

Applicants who do not meet these minimum requirements shall be deemed non-responsive and will not receive further consideration. Any application that is rejected as non-responsive will not be evaluated and no score will be assigned.

XVI. LIST OF ATTACHMENTS AND LINKS

- i. Attachment A: Application Face Sheet & Checklist
- ii. Attachment B: Narrative Response Form
- iii. [Sample IIIB Budget Template](#)
- iv. [Contract Template](#)
- v. [Aging and Adult Services Sanction Policy](#)

XVII. ADDITIONAL DOCUMENTS REQUIRED FOR REVIEW

The following links outline the program requirements and regulations governing Title III B. Copy and paste the link to your web browser to access the document. Applicants must review these documents and make sure you understand the program requirements before submitting an application.

- i. [Older Americans Act - Title III B](#)
- ii. [Title 22 California Code of Regulations](#)
- iii. [California Department of Aging Federal and State Grant Terms and Conditions](#)
- iv. [Office of Management and Budget Circular 133](#)

ATTACHMENT A: IIIB APPLICATION FACE SHEET AND CHECKLIST

Agency Name: _____

Address: _____

City: _____ Zip: _____

Website (if applicable): _____ Fax: _____

Executive Director: _____ Phone: _____ E-Mail: _____

Contact Person: _____ Phone: _____ E-Mail: _____

Total Grant Request (November 1, 2021 – June 30, 2022): \$ _____

This application package includes the following (check all items included in Applicant's response package):

- Cover letter
- Completed Application Face Sheet (Attachment A)
- Blank Scoring Sheet (Attachment B)
- Narrative Response (Attachment C)
- Program Budget (Attachment D)
- Letters of Support
- If submitting a hardcopy, one original, four copies, and one electronic copy on a USB device

I, the undersigned am an official authorized to bind the Applicant to this Response to the Request for Proposal. I understand that the Department of HHS, AAS reserves the right to modify the specifics of this application at the time of funding and/or during the contract negotiation; that no officer, employee or agent of AAS, exercising any function or responsibility in connection with the proposed services contract or with planning or carrying out any agreement relative to this proposal has any personal financial interest, direct or indirect, in the operation of the Applicant; that a contract may be negotiated for a portion of the amount requested; and that there is not contract until a written contract has been signed by both parties and approved by all applicable County agencies and agents.

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

ATTACHMENT B: NARRATIVE RESPONSE FORM

Please provide complete and concise responses to the following questions. Limit your responses to no more than 12 pages total, including this Narrative Response Form.

ORGANIZATIONAL CAPACITY (3 PAGES MAXIMUM); AVAILABLE POINTS: 25

1. Describe your organization's history, purpose, and mission statement.
2. Provide a summary of your organization's experience implementing a service relevant to the service described in this RFP for which you are seeking funding.
3. Describe your organization's experience in reaching the targeted populations, including LGBT older adults, considered priority groups and areas described in this RFP.
4. Describe the organization's experience reaching and serving persons of color (non-Caucasian or White individuals), especially older adult persons of color, in Marin County. Explain how outreach was conducted and how specific services were provided. Include the organization's experience working or partnering with community partners that serve communities of color. Describe how the organization plans to serve older adult persons of color in proportion to the racial/ethnic makeup of Marin County's older adult population. Persons of color currently represent 10 percent of the County's older adult population age 60 and older.
5. Describe the organization's experience in coordinating with local and regional community services to integrate the service delivery system in Marin County. Provide specific examples of how these efforts have led to increased opportunities for older adults to access services. If submitting a collaborative proposal, describe the nature and roles of relationship(s) with other organization(s).
6. Describe the organization's experience in providing the selected supportive service/s to older adults in Marin County. Document the number and characteristics of individuals being served by type of services in Marin County. Explain how this service is clearly distinguished from other services provided by the organization.

PROGRAM DESIGN AND APPROACH (6 PAGES MAXIMUM); AVAILABLE POINTS: 55

1. Provide a summary of the proposed program and describe how it will enhance and strengthen the supportive service/s in Marin County. Identify and explain the appropriateness of planned services and how they fit the program goals.
2. Identify overall **goals** of the proposed program. Describe specific measurable outcome-based **objectives**, with timelines, that will support the fulfillment of the established

program goals.

3. Identify the **Priority Areas and Service Categories** (see section III of this RFP) proposed, along with the **number of units** and the associated funding requested for each service planned.
4. Describe methods for which the effectiveness of the program will be evaluated. Identify ways the service will have an impact on the health/well-being, skills, knowledge, and other factors that support older adults. Identify strategies the agency plans to continuously improve the quality of the program.
5. Describe the outreach/marketing methods the organization intends to employ to generate participation in the program. Identify strategies to reach older adults who have not previously been served by the program.

ADMINISTRATIVE AND FISCAL QUALIFICATIONS (3 PAGES MAXIMUM);
AVAILABLE POINTS: 20

1. Describe the organizational structure and proposed job descriptions and duties of paid staff and volunteers in the program.
2. Discuss how the organization will comply with data and fiscal reporting requirements.
3. Describe the organization's current accounting system, including the following: areas and frequency of accounting for receivables and payables; payroll processing; financial statement preparation and internal/external auditing.
4. Describe a plan for maintaining service delivery during a disaster/emergency/shelter-in-place. The description should include the ability to provide relevant services in alternative formats, such as webinars, video conferences or phone conferences.
5. Describe the system for collecting voluntary contributions for services. Describe how program income will be distributed.
6. Describe the organization's ability to provide cash match and in-kind support.
7. Using the program budget form linked in section XVI and comprehensive narrative, describe the proposed program budget.

Title III B LGBT Supportive Services Request for Proposal Scoring Sheet

I. ORGANIZATIONAL CAPACITY (3 pages maximum)			
Evaluation Criteria	Comments	Max Pts.	Score
1. Describe your organization’s history, purpose, and mission statement.	The applicant has a well-established history of serving Marin County older adult residents. Applicant’s mission, purpose, and goals are aligned with the priorities set forth in this RFP.	3	
2. Provide a summary of your organization’s experience implementing a service relevant to the service described in this RFP for which you are seeking funding.	The applicant demonstrates prior experience delivering the service proposed. Applicant shows successful implementation of the service sought in this RFP or a comparable program.	3	
3. Describe your organization’s experience in reaching the targeted populations, including LGBT older adults, considered priority groups and areas described in this RFP.	Applicant has a clear understanding of the priority group(s) or communities identified in the RFP. Applicant demonstrates experience reaching and serving the priority group(s) and/or target geographic area described in the RFP.	4	
4. Describe the organization’s experience reaching and serving persons of color (non-Caucasian or White individuals), especially older adult persons of color, in Marin County. Explain how outreach was conducted and how specific services were provided. Include the organization’s experience working or partnering with community partners that serve communities of color. Describe how the organization plans to serve older adult persons of color in proportion to the racial/ethnic makeup of Marin County’s older adult population. Persons of color currently represent 10 percent of the County’s older adult population age 60 and older.	The applicant demonstrates past and current experience in providing services to persons of color, particularly older adult persons of color, in Marin. The applicant clearly explains how they conducted outreach to connect with individuals of color, what services they provided and how they provided such services. The applicant describes its experience working with or partnering with community partners that serve communities of color.	4	
5. Describe the organization’s experience in coordinating with local and regional community services to integrate the service delivery system in Marin County. Provide specific examples of how these efforts have	The applicant clearly demonstrates recognition of the importance of coordinating with local service programs within the County. Response clearly describes how the	5	

led to increased opportunities for older adults to access services. If submitting a collaborative proposal, describe the nature and roles of relationship(s) with other organization(s).	partnership has led to better coordination of services and improved access to local resources for clients. Letters of support (minimum of 2) are provided.		
6. Describe the organization’s experience in providing the selected supportive service/s to older adults in Marin County. Document the number and characteristics of individuals being served by type of services in Marin County. Explain how this service is clearly distinguished from other services provided by the organization.	The applicant demonstrates past and current experience in providing community based services to older adults in Marin County. The applicant has a clearly delineated program for the service and has had success in reaching older adults new to the agency.	6	
Subtotal		25	

Comments: Please reference item #:

NAME OF REVIEWER:
(Please print)

SIGNATURE:

II. PROGRAM DESIGN & APPROACH (6 pages maximum)

Question	Evaluation Criteria	Max Pts	Score
1. Provide a summary of the proposed program and describe how it will enhance and strengthen the supportive service/s in Marin County. Identify and explain the appropriateness of planned services and how they fit the program goals.	The proposed program directly addresses the needs of older adults and will strengthen and enhance services to these older adults in Marin County. Proposed services are appropriate and clearly fit the program goals.	15	
2. Identify overall goals of the proposed program. Describe specific measurable outcome-based objectives , with timelines, that will support the fulfillment of the established program goals. This section should include goals and objectives for serving priority populations and persons of color.	The applicant has clearly articulated goals with measurable objectives that address the identified supportive service to older adult's needs, service priorities, priority populations and communities of color.	10	
3. Identify the Priority Areas and Service Categories (see section III of this RFP) proposed, along with the number of units for each service planned on both a 12-mo and 9-mo. basis.	Proposal addresses service priority areas identified by the Older Adult Needs Assessment. Program activities and service unit plan are meaningful and can be reasonably accomplished in the stated timeframe.	10	
4. Describe methods for which the effectiveness of the program will be evaluated. Identify ways the agency will measure the impact of services on the health/well-being, skills, knowledge, and other factors that support caregivers. Identify strategies the agency plans to use to continuously improve the quality of the program.	The applicant has designed a system for evaluating the quality of internal operations and processes as well as service delivery, including client satisfaction and a system for measuring program outcomes.	10	
5. Describe the outreach/marketing methods the organization intends to employ to generate participation in the program. Identify strategies to reach older adults who have not previously been served by the program, including priority populations and persons of color.	The applicant has developed a systematic process of reaching older adults that are new to the organization that allows the program to reach maximum client capacity, including specific methods of outreach to older adults, including those in priority populations and communities of color.	10	
Subtotal		55	

Comments: Please reference item #

NAME OF REVIEWER:

(Please print)

SIGNATURE:

III. ADMINISTRATIVE & FISCAL QUALIFICATIONS (3 pages maximum)

Question	Evaluation Criteria	Max Pts	Score
1. Describe the organizational structure and proposed job descriptions and duties of paid staff and volunteers in the program.	The organization’s structure and staff are adequate to support the administration of the program and for meeting program standards and requirements. The proposed reporting relationships are clear and assure good communication with staff at all levels. The proposed salary and benefit structure are fair and consistent with similar organizations.	2	
2. Discuss how the organization will comply with data and fiscal reporting requirements.	The organization can comply with reporting requirements. For current or previous DAAS contractors, records indicate accurate and timely submission of data and fiscal reports.	3	
3. Describe the organization’s current accounting system, including the following: areas and frequency of accounting for receivables and payables; payroll processing; financial statement preparation, and internal/external auditing.	The organization has in place accounting procedures that will assure effective control and accountability, and which meet state and federal standards.	3	
4. Describe a plan for maintaining service delivery during a disaster/emergency/shelter-in-place.	The applicant has a plan to continue service during a disaster/emergency/shelter-in-place and has exercised that plan recently.	3	

The description should include the ability to provide relevant services in alternative formats, such as webinars, video conferences or phone conferences.			
5. Describe the system for collecting voluntary contributions for services. Describe how program income will be distributed.	The organization has a clear method for collecting program income and a mechanism for supporting those who cannot afford to make donations.	3	
6. Describe the organization's ability to provide cash match and in-kind support.	The organization has sufficient resources to assure successful operation of the program.	3	
7. Using the enclosed budget format and comprehensive narrative, describe the proposed program budget.	The proposed budget is appropriate, cost effective, accurate, and includes a clear, comprehensive narrative.	3	
Subtotal		20	
TOTAL OF ALL SECTIONS		100	
PASSING SCORE TO BE CONSIDERED FOR FUNDING		70	

Comments: Please reference item #

NAME OF REVIEWER:

(Please print)

SIGNATURE: