

**COUNTY OF MARIN**



**Department of Health and Human Services  
Aging and Adult Services**

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**REQUEST FOR PROPOSAL (RFP)**

**DIGNITY AT HOME FALL PREVENTION PROGRAM**

**RFP-HHS-2020-14**

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**DATE ISSUED:** Monday, October 12, 2020

**DEADLINE FOR SUBMISSIONS:** Tuesday, November 10, 2020 at 12:00 p.m.

The County 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, or military or veteran status in employment or in its educational programs and activities. Auxiliary aids and services are available upon request to individuals with disabilities. Alternative formats will be available upon request.

**COUNTY OF MARIN, AGING AND ADULT SERVICES  
REQUEST FOR PROPOSAL (RFP) TIMELINE  
DIGNITY AT HOME FALL PREVENTION PROGRAM  
Control # RFP-HHS-2020-14**

RFP date of issuance	Monday, October 12, 2020
Bidder's conference	Wednesday, October 21, 2020, 10 a.m. – 11 a.m. Link to Join: <a href="#">Zoom Video Conference</a> Meeting ID: 852 9486 5169 Passcode: 240511 Dial by your location +1 669 900 6833
RFP Q & A (online submission only)	Thursday, October 22, 2020 through Wednesday, November 4, 2020 <a href="https://www.marinhhs.org/rfp/2020-14">https://www.marinhhs.org/rfp/2020-14</a>
RFP response submission deadline	<b>Tuesday, November 10, 2020 - 12:00 p.m. PST</b>
Applicant award notification	Monday, November 23, 2020
Protest submission deadline	Wednesday, December 2, 2020
Public Announcement at Commission on Aging meeting	Thursday, January 7, 2021, 11:15 a.m.
Board of Supervisors contract approval*	January 2021
Initiation of services**	January 16, 2021

\*Date subject to Board of Supervisors schedule and County budget and contract processes.

\*\*Contract start date is contingent upon the approval of the Board of Supervisors.

**REQUEST FOR PROPOSAL  
TO PROVIDE DIGNITY AT HOME FALL PREVENTION PROGRAM  
FROM JANUARY 16, 2021 THROUGH JUNE 30, 2021**

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 private, nonprofit, or government entity providers for the provision of the Dignity at Home Fall Prevention Program. The Dignity at Home Fall Prevention Program 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 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 of the within the Marin County Department of Health and Human Services (HHS). AAS administers the Area Agency on Aging (AAA) and works closely with the Commission on Aging (COA), a 23-member advisory council representing supervisorial districts, towns and cities of Marin, and the California Senior Legislature. In partnership with the COA, 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**

Falling can have a widespread and significant impact on one's health and can often result in high medical costs. One out of four older adults falls each year and falls are the leading cause of fatal and non-fatal injuries for this age group, according to the [National Council on Aging](#).

A data brief of the [2019 National Survey of the Area Agencies on Aging](#) shows that most older adults want to live at home and in the community for as long as possible, making home modifications and repairs increasingly important as the older population rises to historic levels. By making changes that adapt or convert features of a home to meet the needs of the older adults who live in them, home modifications help support independent living, caregiving and the prevention of falls. Examples of home modifications include changes that increase accessibility, such as widening doorways, or changes that reduce falls and related injuries, such as securing rugs to the floor, improving lighting or installing grab bars and a walk-in shower in the bathroom. More complex changes include renovations to make everyday tasks easier, such as lowering kitchen counters and adjusting cabinets to heights accessible for individuals who use wheelchairs. Some homes may need repairs before they can be modified to meet the needs of the older adults who live in them (e.g., fixing a leaky pipe before making a bathtub or shower accessible).

In Marin County, falling is a frequently cited concern among older adults. The Marin AAA's 2019 [Older Adults Needs Assessment](#) revealed 9 percent of older adults say they are concerned about falling either when at or away from home. About one third of older adults in Marin reported falling in the past year. Of these older adults, 7 percent called 911 and 20 percent went to the emergency room after an incident of falling.

The Dignity at Home Fall Prevention Program will help to address this important health issue among older adults and adults with disabilities in Marin County.

The County of Marin Aging and Adult Services (AAS) seeks one or more private, nonprofit, or government entity organizations to provide services including injury prevention information, education and referral services; and injury prevention assessments and home modifications including injury prevention equipment, materials and labor costs. Bids that provide a range of educational and referral services along with home modifications will be highly desirable.

**A. Enabling Legislation**

Assembly Bill No. 74 (A.B. 74) of the State of California Budget Act of 2019, Chapter 23, Appropriation 4170-101-0001, Schedule 2, Provision 4, is the enabling legislation for the Dignity at Home Fall Prevention Program.

**B. Eligible Service Population**

Services will be provided to older adults who are 60 and older or have disabilities, who are at risk of falling or institutionalization, and whose adjusted household income does not exceed 80 percent of Marin County’s median family income based on the number of persons in the family.

FY 2020 Income Limit Category	Persons in Family							
	1	2	3	4	5	6	7	8
Low (80%) Income Limits (\$)	97,600	111,550	125,500	<b>139,400</b>	150,600	161,750	172,900	184,050
<b>Explanation</b>								

**C. Priority Populations**

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 at least 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.*

Persons over the age of 60 currently comprise 29% of the total population, making Marin County one of the oldest counties in the Bay Area. <sup>1</sup> Statewide, persons over 60 account for 19% of the population. <sup>2</sup> A majority of Marin County’s older adults age 50 and older are White (90.1%), a rate higher than California as a whole, which is 70% white. <sup>3</sup> Some 10% are persons of color. In Marin, Black/African Americans age 60 and older comprise 1.5% of the population, Asians 4.9%, American Indian/Alaska Natives 0.2%, Native Hawaiian and Other Pacific Islanders 0.2%, Other 1.6% and Two or More Races 1.5%. Five percent of the older adult population identify as being Hispanic or Latino. <sup>4</sup>

<sup>1</sup> American Community Survey 5-year Estimates (2013-2018). Population 60 Years and over in the United States, Marin County. Available at: data.census.gov.

<sup>2</sup> American Community Survey 5-year Estimates (2013-2018). Population 60 Years and over in California.

<sup>3</sup> American Community Survey 5-year Estimates (2013-2018). Population 60 Years and over in the United States, Marin County. Available at: data.census.gov.

<sup>4</sup> Ibid.

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.

The percentage of older adults in Marin will proportionally continue to increase until 2030, when this segment of the population is estimated to account for 38% of residents.

**D. Service Categories**

Service categories include injury prevention information, education, referral services, injury prevention equipment, and injury prevention assessments, services, materials and labor costs.

The following table describes these services. Applicants must describe which of the allowable services they propose along with the number of associated units that will be provided during the contract period and the cost per unit. Applicants may propose to provide one or more services, however, collaborative bids that propose a coordinated approach among agencies are highly desirable. To ensure there is no service duplication, AAS will not generally fund the same unit of service to multiple agencies.

Category	Service	Definition
<b>PROGRAMMATIC SERVICES</b>  Unit Measure: Proposal should specify Cost Per Unit: Proposal should specify	Injury Prevention Community Education	Information and education about injury prevention to older adults and persons with disabilities.
	Information and Referrals	Referrals and provision of fall and injury prevention resources in eligible individuals’ local communities.
	In-Home Assessment	In-home environmental assessments.
	Injury Prevention Instruction and Training	Instruction on behavioral, physical and environmental aspects of injury prevention.
<b>HOME MODIFICATION</b>  Unit Measure: Proposal should specify Cost Per Unit: Proposal should specify	Home Modification	Grab bars, nonskid surfaces, toilet seat risers, shower seats, and transfer benches. Indoor and outdoor handrails and threshold modifications.
	Home Reconfiguration	Reconfiguration of furniture and other elements of the physical home environment to reduce hazards.
	Medication Management	Medication management items (e.g. pill organizers).
	Licensed Electrician Services	Licensed electrician services (i.e., electrical outlets installed by a licensed electrician when necessary to properly place wires that present a trip hazard).

	Home Repair	Unsafe flooring repair (e.g. fixing broken/uneven steps or replacing worn carpet/tread).
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### **III. AVAILABLE FUNDING**

Funding is administered by the California Department of Aging (CDA) and is a one-time total allocation in the amount of **\$143,750**.

Proposal narratives must be accompanied by a clear, concise and reasonable budget for the grant period January 16, 2021 to June 30, 2021 using the budget form provided in this RFP. See section VII for the link to the budget template.

### **IV. MINIMUM QUALIFICATIONS**

Any private, nonprofit, or government entity shall possess a minimum of two years serving the target population.

### **V. 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 January 16, 2021 through June 30, 2021. All contract requirements noted herein and all contract provisions in the standard contract (see section XVI iv) shall apply. By submitting a proposal, 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. Program Materials**

All publications and written materials -- including websites and through other electronic means - developed by the program must include the following statement: “Funding for this program, at

least in part, is made available by the Older Americans Act (OAA), administered locally by the Marin Department of Health and Human Services, Aging and Adult Services.”

### **C. Reporting and Monitoring Requirements**

The following tasks must be performed to ensure the integrity of the Dignity at Home Fall Prevention Program:

- Conduct an intake with each potential program participant to determine eligibility for purchased fall prevention services.
- Collect and maintain program data for reporting (e.g. number of completed assessments, number of clients served, fall prevention equipment purchased, number of in-home assessments performed and other forms of programmatic data.)
- Administer program evaluation and quality assurance tools, which may include but are not limited to, client satisfaction surveys and questionnaires.
- Conduct outreach to ensure the maximum number of eligible individuals participate in the program.
- Generate monthly expenditure reports and quarterly programmatic reports are required by the State.
- 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 contract allocation will not be reimbursed.
- Collect and track demographic information including date of birth, zip code, race, ethnicity and Sexual Orientation and Gender Identity (SOGI) questions.

### **VI. APPLICATION PROCEDURE**

Grant applications may be downloaded from the [Aging and Adult website](#).

Grant applications will also be available for **pick up** starting **Monday, October 12, 2020 between 8:30 a.m. and 4:30 p.m.** at the following office:

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



Questions regarding the RFP may be directed at the online Bidder's Conference, scheduled for **October 21, 2020, Time 10:00 a.m. – 11:00 p.m.** via [Zoom video conference](#). 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 Aging and Adult Services (AAS) website within 48 business hours. Subsequent questions from bidders may also be sent via internet to [Department of HHS RFP website](#) until **Wednesday, November 4, 2020 at 4:00 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 Commission on Aging 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 must be received by 12 p.m. on Tuesday, November 10, 2020. Deliver response packages, as described in the next section, to Aging and Adult Services office at 10 North San Pedro Road, Reception, Attn.: Mandy Reyes.** 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.

## **VII. CONTENT OF THE RESPONSE PACKAGE**

A complete request for proposal application package must include an original, four copies, and an electronic copy saved on a USB device. 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.

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.

All proposals 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.

The proposal on the USB device must contain all contents of the proposal in one attachment.

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 the Dignity at Home Fall Prevention Program and successfully fulfill its requirements and deliver the services. Narrative responses should be provided directly on the Narrative Response Form and must not exceed 10 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 (Attachment C)**

Using the [Sample 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.

**D. Blank Scoring Sheet (Attachment D)**

This sheet is for your information. The panel reviewers will base the review of all proposals around these questions and your answers to the questions.

**E. 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 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 **Monday, November 23, 2020**. 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. PST on Wednesday, December 2, 2020 by email to [lpullen@marincounty.org](mailto: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) or via e-mail 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 deniable 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 10<sup>th</sup> 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. Attachment C: [Sample Budget Template](#)
- iv. Attachment D: Blank Scoring Sheet
- v. [Contract Template](#) Note: If your organization has not previously entered into a contractual relationship with the County of Marin, please have your legal representative review this standard County contract. Any questions regarding verbiage can submitted during the RFP Q&A period from October 22 – November 4, 2020.
- vi. [Sanction and Appeals Policy](#)



# ATTACHMENT A: 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 (**January 16, 2021 – June 30, 2021**): \$ \_\_\_\_\_

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

- Cover letter
- Completed Application Face Sheet (Attachment A)
- Narrative Response (Attachment B)
- Program Budget (Attachment C)
- Blank Scoring Sheet (Attachment D)
- Letters of Support
- 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 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 these program services to older adults 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 fall prevention to older adults 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 **Service Categories** (see section II D of this RFP) proposed, along with the **number of units** for each service planned and the **cost per unit**.
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 while following current public health recommendations.
5. Describe the organization's ability to provide cash match and in-kind support.
6. Using the program budget form linked in section XVI and comprehensive narrative, describe the proposed program budget.

**ATTACHMENT D:  
Dignity at Home Fall Prevention Program  
Request for Proposal 2020 Scoring Sheet**

<b>I. ORGANIZATIONAL CAPACITY (3 pages maximum)</b>			
<b>Evaluation Criteria</b>	<b>Comments</b>	<b>Max Pts.</b>	<b>Score</b>
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 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	The applicant clearly demonstrates recognition of the importance of coordinating with local service programs within the County.	5	

<p>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).</p>	<p>Response clearly describes how the partnership has led to better coordination of services and improved access to local resources for clients. Letters of support (minimum of 2) are provided.</p>		
<p>6. Describe the organization's experience in providing these program services to older adults in Marin County. Explain how this service is clearly distinguished from other services provided by the organization.</p>	<p>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.</p>	<p>6</p>	
<p><b>Subtotal</b></p>		<p><b>25</b></p>	

**Comments: Please reference item #:**

**NAME OF REVIEWER:**

(Please print)

**SIGNATURE:**

<b>II. PROGRAM DESIGN &amp; APPROACH (6 pages maximum)</b>			
<b>Question</b>	<b>Evaluation Criteria</b>	<b>Max Pts</b>	<b>Score</b>
1. Provide a summary of the proposed program and describe how it will enhance and strengthen fall prevention to older adults 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 <b>goals</b> of the proposed program. Describe specific measurable outcome-based <b>objectives</b> , 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 fall prevention program service to older adult's needs, service priorities, priority populations and communities of color.	10	
3. Identify the <b>Service Categories</b> (see section II D of this RFP) proposed, along with the <b>number of units</b> for each service planned and the <b>cost per unit</b> .	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 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.	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	
<b>Subtotal</b>		<b>55</b>	

**Comments: Please reference item #**

**NAME OF REVIEWER:**  
(Please print)

**SIGNATURE:**

<b>III. ADMINISTRATIVE &amp; FISCAL QUALIFICATIONS (3pages maximum)</b>			
<b>Question</b>	<b>Evaluation Criteria</b>	<b>Max Pts</b>	<b>Score</b>
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.	3	
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 description should include the	The applicant has a plan to continue service during a disaster/emergency/shelter-in-place and has exercised that plan recently.	3	

ability to provide relevant services while following current public health recommendations.			
5. 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	
6. 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.	5	
<b>Subtotal</b>		<b>20</b>	
<b>TOTAL OF ALL SECTIONS</b>		<b>100</b>	
<b>PASSING GRADE TO BE CONSIDERED FOR FUNDING</b>		<b>70</b>	

**Comments: Please reference item #**

**NAME OF REVIEWER:**  
(Please print)

**SIGNATURE:**