

COUNTY OF MARIN



DEPARTMENT OF HEALTH AND HUMAN SERVICES  
AGING AND ADULT SERVICES

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REQUEST FOR PROPOSAL (RFP)

FUNDING FOR THE OLDER AMERICANS ACT (OAA)

- 1. Title IIIB Supportive Services
- 2. Title IIIC Senior Nutrition Services
- 3. Title IIID Health Promotion Evidence-Based
- 4. Title IIIE Family Caregiver Support Program

RFP-HHS-2024-17

<https://www.marinhhs.org/rfp/2024-17>

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DATE ISSUED:

Monday, July 29, 2024

DEADLINE FOR SUBMISSIONS:

Monday, August 26, 2024, 12 p.m. PST

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 or 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](mailto:disabilityaccess@marincounty.org).

REQUEST FOR PROPOSAL

TO PROVIDE TITLE III B Supportive Services; IIIC-2 Nutrition Services; IIID Health Promotion Services; IIIE Family Caregiver Support Program  
FROM October 1, 2024 THROUGH June 30, 2025 and July 1, 2025 THROUGH June 30, 2030

All applicants are hereby advised of the following schedule and will be expected to adhere to the applicant- related deadlines below:

RFP Advertised	Monday, July 29, 2024
Bidder's conference	<p>Thursday, August 8, 2024 Time: 10:30 a.m. – 12 p.m.</p> <p>Location: Zoom Teleconference (click link to join) – <a href="#">Zoom Bidders Conference</a></p> <p>Meeting ID: 891 2027 6317 Passcode: 670162</p> <p>Call-in: 669-219-2599</p> <p>One tap mobile +16692192599,,89120276317#,,,,*670162# US</p>
RFP Question/Answer Period (online submission only)	Friday, August 9 –Monday, August 19, 2024 at 3 p.m. Access at: <a href="https://www.marinhhs.org/rfp/2024-17">https://www.marinhhs.org/rfp/2024-17</a>
RFP response submission deadline	<b>Monday, August 26, 2024, 12 p.m. PST</b>
Notification of Intent to Award	Monday, September 9, 2024
Protest submission deadline	Friday, September 13, 2024, 4 p.m.
Public Announcement at Commission on Aging meeting	Monday, October 14, 2024, 1:30 p.m.
Contract Start Date*	Tuesday, October 1, 2024

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

**REQUEST FOR PROPOSAL**  
**TO PROVIDE OAA funded TITLE III B Supportive Services; IIIC-2 Nutrition Services; IIID Health Promotion Services; IIIE Family Caregiver Program**  
**FROM October 1, 2024 THROUGH June 30, 2025 and July 1, 2025 THROUGH June 30, 2030.**

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 federally funded Older Americans Act (OAA) Title III B Supportive Services, Title III C Nutrition Services, Title III D Health Promotion, Title III E Family Caregiver Support Program. Funds for the OAA are contingent upon the availability of federal, state, and local funds. The OAA 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 for each service category. Collaborative proposals that show a strong inter-agency partnership between a lead agency and one or more other agencies to develop a robust program that does not lead to duplicative or fragmented services are highly desirable. Each proposal must also identify strategies to reach underserved populations including lesbian, gay, bisexual, transgender (LGBT) individuals, people of color, low-income and rural residents, 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, and make sure that all procedures and requirements of the RFP are accurately followed and addressed.
- Review answers to questions posted by bidders (Bidders' Conference and/or questions and answers from website), as noticed in this document.
- 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. BACKGROUND**

### **A. BOARD OF SUPERVISORS**

The Marin County Board of Supervisors launched a [Race Equity Action Plan \(REAP\)](#) in 2022. The Race Equity Planning Committee identified three critical focus areas—economic opportunity, housing, and mental health—as high-leverage opportunities to catalyze racial equity in Marin. REAP reflects research from the Government Alliance on Race and Equity, which notes that while it is critical to address all areas of marginalization, by leading with the goal to eliminate racial inequity, state and local governments will be better equipped to transform systems and institutions impacting other marginalized groups. Among the Marin County Board of Supervisors' actions around the REAP was its adoption in 2022 of "Racism as a Public Health Crisis" resolution.

### **B. DEPARTMENT OF HEALTH AND HUMAN SERVICES STRATEGIC PLAN TO ACHIEVE HEALTH AND WELLNESS EQUITY**

In 2018, Marin County Health and Human Services (HHS) launched a strategic plan to achieve health and wellness equity in Marin. While income, education, and other socioeconomic and cultural factors play key roles in shaping outcomes in our communities, the direct effects of racism – whether covert or overt, intentional or unintentional, systemic or individual – must be acknowledged and addressed to achieve equity.

Research demonstrates independent associations of racial discrimination on driving inequities, including downward mobility.

Central to our efforts on leading with race to achieve equity is treating clients respectfully and with cultural humility. HHS commits to systematically expanding this work throughout the Department and to supporting contracted service providers to do the same. By deepening our understanding of how individuals experience accessing and receiving services and understanding how services result in outcomes by race and ethnicity, HHS and contracted service providers can identify opportunities to improve service delivery.

HHS recognizes that leading with race to achieve health and wellness equity requires working with our partners in new ways. These collaborations will amplify efforts on leading with race to advance health and wellness equity by aligning and coordinating work, accomplishing more than HHS or any other single organization could do alone.

To achieve these goals, we must work differently across sectors. New and non-traditional partnerships can help remove barriers to opportunity and direct resources toward evidence-based efforts that address historic inequities.

This RFP seeks bids that demonstrate efforts to promote racial equity in providing the proposed services. To learn more about the HHS Strategic Plan to Achieve Health and Wellness Equity, visit: [Marin Equity Progress Report](#).

#### C. 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 federally mandated advisory council representing supervisorial districts, towns and cities of Marin, and the California Senior Legislature. As such, 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 and operates the Long-Term Care Ombudsman, Adult Protective Services, and In-Home Support Services programs.

#### D. 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. PROJECT DESCRIPTION AND EXPECTATIONS

#### A. PROJECT PERIOD

Contract awards will be made on a competitive bid basis. The anticipated contract period is from October 1, 2024 to June 30, 2025 and July 1, 2024 to June 30, 2030 as delineated in Section B below. The County reserves the right to: increase or decrease the contract amount, fund the proposed service in whole or in part, and/or terminate or extend the program/contract based on funding availability.

The contract award is for nine months starting October 1, 2024 and ending on June 30, 2025. There will be opportunities for renewal for each of the next three years following the period specified in this announcement which will end on June 30, 2030. Funds for Title III C-2 are contingent upon the availability of federal, state and

local funds. AAS reserves the right to make multiple or partial awards of contracts through this RFP, or to award none.

## B. AVAILABLE FUNDING AND PRIORITY AREAS

### **Older Americans Act**

The federal Older Americans Act funding is administered through the California Department of Aging through allocations to the Area Agency on Aging Planning and Service Areas. Older Americans Act titles contain specific service categories and requirements. Activities funded through the OAA contribute to providing support to the age 60+ population. Definitions are outlined in the [Data Dictionary](#) provided by the California Department of Aging

**OAA** funds are available for the nine-month period of October 1, 2024 through June 30, 2025, with an opportunity for renewal for each of the next three years. Service areas and amounts are delineated in **Appendix 1**.

For each proposed service a full proposal packet must be submitted giving the proposer the opportunity to highlight different aspects of their qualifications and background. Proposal narratives must be accompanied by clear, concise and reasonable separate budgets for each proposed service category for the grant period of October 1, 2024 to June 30, 2030 using the budget form provided in this RFP. Each proposal must clearly delineate how many service units will be performed and how many estimated unduplicated clients or unduplicated will be served in the grant period, depending on whether services are categorized as non-registered or registered services (see Service Definitions below). For registered services requiring unduplicated client counts, an unduplicated client may only be counted once during each fiscal year for each program area.

### **Funding Priority Areas**

Marin County AAS is seeking qualified home- and community-based nonprofit or public agencies to provide programs that will respond to the identified needs of older adults in Marin County. Results of the quantitative 2023 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 or in home to help make services accessible to more individuals.

The County may choose to award two or more high-scoring applicants' part of the total allocated funding in each category listed in Section E: Project Description.

### **Service Definitions:<sup>1</sup>**

This RFP seeks services as defined by the California Department of Aging (CDA) in accordance with the Older Americans Act (OAA). Applicants should carefully review the following service descriptions, including the units of service and data requirements, then review the combination of services this RFP seeks in the Project Description section. Proposed services must adhere to the following service descriptions, rather than offering different or modified services, to be considered for funding.

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<sup>1</sup> California Department of Aging Data Dictionary. Available at:  
<https://www.aging.ca.gov/download.ashx?IE0rcNUV0zYVluwocgk52g%3D%3D>

All services are categorized as non-registered or registered services which determine the type of data winning bidders will be required to collect and report.

- **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.

CDA's defined services are grouped into three areas called Priority Access Services, Priority In-Home Services and Other services. This RFP seeks services in all areas. Services will be considered at the same level of importance. The California Department of Aging Data Dictionary can be accessed here: [CDA Data Dictionary July 2024 \(ca.gov\)](#).

### C. ELIGIBLE SERVICE POPULATION

Services must target older adults aged 60 years and above living in Marin County, with attention to low-income older individuals, 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. The Older Americans Act stipulates services must be provided to individuals regardless of income. Additionally, winning bidders may not charge any eligible individual to participate in any AAA-funded service. Program participants are required to be provided the opportunity to voluntarily contribute to the cost of the service and informed there is no obligation to contribute. Class, membership, registration or other fees or other charges are prohibited.

### D. TARGET POPULATION

The 2023 [Older Adults Needs Assessment](#) that informed the [AAA 2024-2028 Area Plan](#) 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.

In 2023, Marin was ranked as the healthiest county in the state of California by the Robert Wood Johnson foundation.<sup>2</sup> Marin County has a total population of approximately 260,485 people and has a substantial number of older adult residents. Persons over the age of 60 currently comprise 30% of the total population, compared to 20% statewide. Marin's older adults mostly identify as Caucasian at 87%. The percentage identifying as Asian is 5.5% and 1.5% as Black or African American with 6% percent identifying as Hispanic or Latino ethnicity.<sup>3</sup> There is no baseline Census measure to determine the percentage of those who are LGBT. Using the randomized AAA *Older Adult Needs Assessment*, 4% of Marin's older adults identify as being Bisexual, Gay, Lesbian, or Same Gender Loving and less than 1% identifying as non-binary.

While ranked as the healthiest county in California, life expectancy among African American residents in Marin County is 78.3 years, a difference of nearly seven years from the countywide average. There are also other racial disparities that continue to drive the gap in life expectancy, including disparities in income, housing, health care, and education. Thus, aligning with the Marin County HHS Department's Strategic Plan to Achieve Health and Wellness Equity ([Marin Equity Progress Report](#)), the AAA seeks proposals that will demonstrate how applicants will make special efforts to reach older adult persons of color. The HHS Equity Plan is built upon the Marin

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<sup>2</sup> County Health Ranking. Available at: <https://www.countyhealthrankings.org/>. Accessed 3/6/24.

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.

Other key concerns of older adults that relate to the services being sought are described in the following four paragraphs of this section.

Nearly 25% of all Marin's older adults fell at or below the Elder Economic Security Level, (\$43,740 for one person and \$59,160 for a couple) needing to make monthly decisions as to whether to pay for rent, electricity, food, medications, and other essential expenses. This is a concern of older adults as revealed in the [2023 Older Adult Needs Assessment](#).

Eighteen percent of older adults surveyed are classified as food insecure. Food Insecurity has increased by 8% since 2019 among older adults in Marin County. Worries about food running out before being able to buy more food were reflected by 16% of the survey respondents. Additionally, 13% of older adults reported their food didn't last until they had sufficient funds to buy more food. People who are lonely are more likely to be food insecure. Women are twice as likely as men to be food insecure. Additionally non-Caucasians are twice as likely as Caucasians to be food insecure. Among the differing age brackets, people 60-64 years old are significantly more likely to be food insecure as compared to those aged 75 and older.

Housing affordability struggles are more pronounced among women, those who are low-income, Hispanic, Black, and between the ages of 60-64. Of note, the age bracket most likely to be food insecure, report high levels of financial insecurity, and worry about affording rent/mortgage was the youngest cohort of 60-64, who happen to be the youngest of the Baby Boomers.

Social Isolation is a significant issue for older adults in Marin County. Social isolation factors include being excluded or devaluated because of age as well as lacking companionship, feeling left out and isolated from others. Women report being three times as likely as men to have felt excluded or devaluated because of their age. Half of the women surveyed report they lack companionship at least some of the time. Those who are food insecure and low-income report being twice as likely as the general population to feel they often lack companionship. LGBTQ individuals are 2-3 times more likely to express higher levels of feeling isolated or left out. Of note, women are three times more likely to always eat alone as compared to men.

In the U.S., one in four older adults experiences a fall every year, but less than half tell their doctor. In Marin that number is even higher, with almost one third of older adults reporting at least one fall in the previous year. One third of those sought out medical attention as a result of their fall. Among those age 65 and older, falls are the leading cause of injury related deaths and the age-adjusted rate of fall death is increasing.<sup>4</sup> Falling once doubles your chances of falling again. One out of five falls causes a serious injury such as a broken bone or a head injury.<sup>5</sup> Many people who fall, even if they're not injured, become afraid of falling. Injuries that result from falls and an increased fear of falling can prevent older adults from participating in daily activities such as cooking, cleaning and even going for walks. As a result, some older adults develop sedentary behavior, depression and ultimately a decreased quality of life.<sup>6</sup> Among the recommendation from the CDC to reduce the risk of falling are doing strength and balance exercises and making one's home safer.

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Centers for Disease Control: Facts About Falls. Available at: [Facts About Falls | Fall Prevention | Injury Center | CDC](#). Accessed 3/1/24.

<sup>5</sup> Ibid.

<sup>6</sup> Vellas BJ, Wayne SJ, Romero LJ, Baumgartner RN, Garry PJ. Fear of falling and restriction of mobility in elderly fallers. *Age and Ageing* 1997; 26:189–193.

The burden of family caregiving is significant. The needs assessment showed unpaid caregivers are three times more likely to report physical stress, Caregivers are twice as likely to report emotional stress and twice as likely to report financial stress. Unpaid caregivers are significantly more likely to say they are unaware of support services and/or how to access them. One fifth of older adults need help to find or access services. Caregivers represent over 40% of the needs assessment respondents as needing help to find resources. For those caregivers that are low income, over 75 years old, and are female, the need for assistance is exponentially greater.

#### E. PROJECT DESCRIPTION: SEE APPENDIXES

This RFP seeks proposals in four classifications as defined by CDA: **Supportive Services; Senior Nutrition (Home-Delivered); Health Promotion Evidence-Based; Family Caregiver Support Program**. The service classifications are described in Appendixes 2, 3, 4, 5 as the singular services or service combinations sought.

This RFP seeks proposals that will provide services to older adults throughout Marin County, including the rural areas of West Marin. Collaborative proposals that bring together a lead agency and other organizations to serve all geographic areas of the county and maximize service delivery are highly encouraged.

#### F. 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 staff providing registered services must complete the California Department of Aging Security Awareness Training within two months of the start of a contract and complete every fiscal year thereafter. Documentation of completion must be sent to AAA staff accordingly. All individuals with access to individual client data must complete a background check with documentation to be reviewed by the AAA.

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 policies and procedures, review satisfaction survey results, 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 may 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.

#### G. MAINTENANCE OF PERFORMANCE LEVELS

For all services funded by AAS 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 that could include a corrective action plan that could lead to contract termination.

#### H. AUDIT REQUIREMENTS



An annual audit by a Certified Public Accountant must be delivered to AAS within 120 days after the end of an 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.

### III. REQUIREMENTS AND EXPECTATIONS FOR GRANTEEES

If you are an organization that does not meet these requirements independently, consider partnering with an organization that does.

#### A. SUMMARY OF CONTRACT TERMS, CONDITIONS AND REQUIREMENTS

The contractor shall be required to comply with the Americans With Disabilities Act of 1990, Sections 504 and 508 of the Rehabilitation Act of 1973 as amended, and all other applicable Federal and State accessibility laws and regulations; this Request for Application [RFP-HHS-2024-17](#); and the terms and conditions required by the original funding source for the programs and services described by this RFP and the terms and conditions of the County of Marin's Professional Services Contract. The County's Professional Services Contract contains specific provisions, including but not limited to nondiscrimination in hiring and in the provision of services, program evaluation, record keeping, payments, limitations and obligations, conflict of interest, indemnification and insurance, assignment, and HIPAA. By submitting an application, the applicant agrees to be bound by all terms and conditions of the County's Standard Professional Services Contract.

#### B. INSURANCE

The County requires that contractors carry \$1,000,000 in liability insurance (\$2,000,000 aggregate). The County must be named as an 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, attached hereto as Attachment D. Prior to submitting an application, it is strongly suggested that applying entities be certain of the ability to secure this insurance and the additional insured endorsement if they are awarded the contract.

Insurance can be waived in some instances by submitting Exhibit C – attached to a Professional Services Contract. Some valid reasons for waiving insurance include:

- No employees/ sole contractor – Workers Comp can be waived
- Not driving on county business or on county property – Auto Insurance can be waived
- Not a certified/ licensed "professional" – certain professional liability can be waived

#### C. ADMINISTRATIVE AND LEGAL REQUIREMENTS

1. Contractors will be paid on a monthly basis, following the submission of an invoice for services performed to the County's satisfaction. Specific instructions will be provided to the contractor upon award of a contract. Services will be reimbursed 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 allocation will not be reimbursed.
2. This RFP and any resulting agreement, contract, and purchase order shall be governed by all applicable federal, state and local laws, codes, ordinances and regulations, including but not limited to, those promulgated by CAL-OSHA, FED-OSHA, EPA, EEOC, DFEH, the California State Department of Health Services, and the County of Marin. All matters and subsequent contract shall be governed by, and in accordance with, the substantive and procedural laws of the State of California. The applicant agrees that all disputes arising out of or in connection with the Professional Services Contract and the procurement

process shall be construed in accordance with the laws of the State of California and that the venue shall be in Marin County, California.

3. Nuclear Free Zone: The County is a nuclear free zone, in which work on nuclear weapons or the storage or transportation of weapons-related components and nuclear material is prohibited or appropriately restricted. The County is prohibited or restricted from contracting for services or products with, or investing County funds in, any nuclear weapons contractor.
4. Non-Appropriations: The County's performance arising from this RFP process is contingent upon the availability of funds. Should funds not be appropriated or otherwise made available to the County, any contract entered into pursuant to this RFP will be terminated with respect to any payments for which such funds are not available.
5. 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.
6. 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, if applicable.
  - 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, national origin, age, disability, citizenship, political affiliation or belief.
  - d. Complies with the 1990 ADA, the Americans with Disabilities Act, Sections 504 and 508 of the Rehabilitation Act of 1973 as amended, and all other applicable Federal and State accessibility laws and regulations.
7. Applicants must have proven fiscal capacity including capacity for fund accounting.
8. Applicants must have access to non-County funds sufficient to cover any disallowed costs that may be identified through the audit process.
9. 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.
10. Applicants must be eligible to receive Federal funds.
11. Contractors must comply with all reporting requirements set forth by the Marin Department of Health and Human Services and the State Department of Health Care Services.
12. Applicants must have the demonstrated ability to collect outcome data, which measures performance to plan.
13. 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.

14. Contractor agrees to administer/utilize any and all survey instruments as directed by the County Department of Health and Human Services, including outcomes and satisfaction measurements if applicable. Contractors must also comply with all reporting requirements set forth by the Department of Health and Human Services and the State Department of Health Care Services, including, but not limited to, completion of cost reports, annual provider self-audits and site visits.
15. Cultural Competency: It is recommended (but not required) that all program staff receive at least four hours of in-service training per year on some aspect of providing culturally and linguistically appropriate services. Should staff participate in this recommended training, contractor shall provide County with record of training and a list of participants at each such training.

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

#### **IV. APPLICATION INSTRUCTIONS**

In responding to the RFP (the submission is hereinafter referred to as “Application” or “Letter(s) of Interest”), use the outline as it appears below and label your responses accordingly. If the total number of pages exceeds the parameters stated below, the additional pages will be discarded and will not be reviewed by the Application Review Committee. A non-response will result in disqualification of the Application. Ensure that all applicable fields are completed and that the cover page is signed.

A complete request for proposal application package must be included when submitted. 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. For each program proposed, bidder should complete and submit a separate application.

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.

Upload all required documents here: <https://www.marinhhs.org/rfp/2024-17>

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

1. 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.

2. Narrative Response (Attachment B)

Using the Narrative Response Form of this RFP, respond to the questions and information requested to describe the Applicant's capacity to administer proposed Services and successfully fulfill its requirements and deliver the services. Narrative responses should be provided directly on the Narrative Response Form and must be in 12 pt. or higher font and 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. One narrative response is required for each proposed category of service.

### 3. Program Budget

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. One budget must be submitted for each individually defined service category. Separate budgets must be completed for each grant period in this RFP.

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 IIIB Supportive and IIIC Nutrition Services is 10%. There is no specific match required for the IIID Health Promotion programs. The required minimum program matching contributions for IIIE Family Caregiver Support is 25%.

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.).

### 4. Letters of Support

Include two letters of support from other organizations highlighting knowledge of your organization's capabilities and experience that are relevant to your proposal. Letters should not be from other organizations with which you are partnering on your proposal(s).

## V. APPLICATION SUBMISSION REQUIREMENTS

### A. GENERAL POLICIES

1. The County assumes no obligation for any of the costs associated with responding to this RFP including, but not limited to, development, preparation, and submission of applications.
2. This RFP is in no way an agreement, obligation, or contract between County and any applicant.
3. The applications will become the property of the County upon submission and may be subject to the terms of the California Public Records Act ("PRA"), as required by law.
4. By submitting an application, applicants acknowledge and agree as follows: that the County is a public agency subject to the disclosure requirements of the PRA; that applicants must clearly identify all proprietary information that is contained in the application submitted to the County, if applicant claims that such information falls within one or more PRA exemptions; that applicants must mark said proprietary information as "CONFIDENTIAL AND PROPRIETARY" and must identify the specific lines containing the information; that the County will make reasonable efforts to provide notice to the applicants prior to such disclosure in the event of a PRA request; that applicants are required to obtain a protective order, injunctive relief, or other appropriate remedy from the Marin County Superior Court, before the County's deadline for responding to the PRA request; that if an applicant fails to obtain such remedy within County's deadline for responding to the PRA request, County may disclose the requested information without penalty or liability; and that applicants shall defend, indemnify, and hold County harmless against any claims, action, or litigation, including but not limited to all judgments, costs, fees, and attorney fees that may result from denial by County of a PRA request for information arising from any representation or any action (or inaction), by the applicants.
5. 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.
6. The County reserves the right to make an award without further discussion of the applications received. Therefore, it is important that the application be submitted initially on the most favorable terms from both a

technical and cost standpoint.

7. While it is the intention to award the contract to one applicant, the County reserves the right to split the award in any manner deemed most advantageous to the County. The County also reserves the right to increase or decrease the award amount.
8. 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.
9. 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 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 provisions award with the stipulation that special terms and conditions regarding the areas of concern will be a part of the contract.
10. An application may be **immediately** rejected and disqualified for any of the following reasons:
  - a. The application is not received at the time and place specified in the RFP;
  - b. The application does not adhere to the required material elements of format and guidelines or substantive requirements set forth in this RFP;
  - c. Evidence indicates that the applicant, applicant's staff or consultants have in any way attempted to influence the confidential nature of the review through contact with Marin County staff or members of the selection review committee.

## B. APPLICATION PROCEDURE

The RFP includes four funding categories and corresponding services. Applicants should indicate which area or areas are being proposed on the application cover sheet.

Grant applications will be available online and in person starting Monday, July 29, 2024. Applications may be downloaded here: <https://www.marinhhs.org/rfp/2024-17>

Applications may be picked up between July 29 - August 25, 2024, 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

## C. 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.

## D. SUBMISSION DEADLINE AND FORMAT

Please upload a PDF version of your application for each program including all attachments **no later than 12pm PST on Monday, August 26, 2024**. No verbal applications will be considered. To submit your application, visit <https://www.marinhhs.org/rfp/2024-17>.

1. Proposals must be received by the date and time recited above. It is up to the applicant to ensure that the application was received by the date and time recited above. Proposals, modifications, or corrections received after the deadline specified will not be considered, except if such modifications or corrections were at the County's request.

2. Only Applications submitted in the format described within this RFP will be considered. Applications must be submitted via website upload in PDF format on standard 8-1/2" x 11", typed, in no less than 12-point typeface, with 1" margins and pages numbered consecutively. The narrative response (Attachment B Narrative Response form) portion may not exceed 12 pages total, including the form itself. If the total number of pages for the narrative response exceeds the parameters stated herein, the additional pages will be discarded and will not be reviewed. One narrative response is required for each proposed category of service. The application must be in accessible format. The complete RFP application submission may exceed 12 pages and should include a cover letter, budget, letters of support, etc.
3. An Application may be rejected if incomplete, if it contains any alterations of form, or if it contains other irregularities of sufficient magnitude or quantity to warrant a finding of being substantially non-compliant.
4. The County may in its discretion accept or reject in whole or in part any or all Applications, may cancel, amend or reissue the RFP at any time prior to contract approval and may waive any immaterial defect in an application. The County's waiver of an immaterial defect shall in no way modify the application requirements or excuse the applicant grantee from full compliance with the objective if awarded the contract.

#### E. CONTACT BETWEEN APPLICANT AND COUNTY

- (1) **County staff contact:** During the period from issuance of this RFP and the award of the contract to a successful applicant, contact regarding the specific subject of this RFP between potential or actual applicant 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.
- (2) **Questions regarding the RFP:** To maintain a fair and impartial process, all questions regarding this RFP must be submitted in writing via the County's website and contain a contact name and address. All questions and responses will be available on the County's website Friday, August 9 –Monday August 19, 2024 at 4 p.m. No telephone consultation will be provided. **Questions must be submitted via the County website at <https://www.marinhhs.org/rfp/2024-17>.** Answers will be posted within two business days.
- (3) **Pre-Proposal Bidder's Conference:** There will be a non-mandatory pre-proposal bidder's conference at the date and time listed below. Attendance is optional and not a pre-requisite for submission of a proposal. All questions asked and answers given will be posted via the County website at: <https://www.marinhhs.org/rfp/2024-17>
  - Thursday, August 8, 2024
  - Time: 10:30 a.m. – 12 p.m.
  - Location: Zoom Teleconference (click link to join) – [Zoom Bidders Conference](#)
  - Meeting ID: 891 2027 6317
  - Passcode: 670162
  - Call-in: 669-219-2599
  - One tap mobile: +16692192599,,89120276317#,,,,\*670162#

### VII. APPLICATION REVIEW AND SELECTION PROCESS

#### A. APPLICATION REVIEW AND SELECTION

HHS staff will conduct an initial technical review to ensure that the format requirements outlined in this RFP have been fulfilled. If any of the material format or substantive requirements is missing or incorrect, the application may be disqualified.

All applications that pass the initial technical review will be submitted to an Application review committee that shall evaluate and rank the applications. The committee will be comprised of parties knowledgeable about the services sought by this RFP from diverse backgrounds, **including persons with lived experience from the target population of this RFP**, representatives from other county departments, representatives from local advisory boards or community-based organizations, and/or any other individuals that HHS deems capable and appropriate for the selection of potential providers. The committee shall not include any AAA staff or any potential contractors, and no committee member may apply or assist others in applying for this contract.

The purpose of the evaluation is to determine which applicants demonstrate the skills, expertise and experience to successfully perform the tasks specified in the RFP. Each committee member will independently read and score each application using a standardized scoring instrument. The scoring instrument will reflect the requirements of the RFP. A copy of the scoring instrument that will be used can be found in [Attachment C](#). The County reserves the right to seek clarifying or additional information from applicants, potentially including site visits or agency interviews. Proposals must receive a minimum score of 70 points out of 100 possible points to be considered for funding.

The committee will make award recommendations to the Director of Aging and Adult Services or the Director of Health and Human Services, or designee, who will make the final recommendation to the Marin County Board of Supervisors or County Administrator.

Prior to making an award, the County may choose to conduct interviews with applicants. The purpose of the interviews would be to ask follow-up questions that may arise from the review committee and collect any additional information not gleaned from the Applications. The County may also request additional information necessary to determine the applicant's financial stability, ability to perform on schedule or willingness to incorporate additional features in the application, and any other relevant information necessary to make the award.

Once a decision is made, a Notice of Intent to Award will be emailed to all applicants evaluated by the committee.

## B. 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 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.

Delivery of Protest:

All protests must be submitted in writing and received by 4 p.m. PST on Friday, September 13, 2024 to Jenay Cottrell 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: Jenay Cottrell, Director, Aging and Adult Services

The protest must be postmarked within five calendar days of the notice issuance. The Applicant bears the risk of non-delivery.

The protest will be forwarded, through the appropriate administrative channels, to the Director of the Marin County Department of Health and Human Services, or designee. The Department Director or designee may review the original RFP Application(s), the public notice, the Request for Application document, and the scoring instruments of the Application review committee, and any other document deemed appropriate. The Department Director or designee will provide a written response to the protest, including any action that will be taken, if applicable. The decision of the Department Director or designee shall be final.

### C. POST AWARD

Once the Notice of Intent to Award has been issued, the provider selected will be contacted to execute the [County Professional Services Contract](#). At that time, the selected provider and the County may discuss adjustments to the budget and the scope of work. **No other provisions of the County's Standard Professional Services Contract will be negotiated.**

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

For the duration of the contract period, contract renewals are contingent upon the demonstration of progress in achieving measurable results to the County's satisfaction and compliance with all contract requirements, as well as the continued availability of contract project funding.

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