



MONTEREY COUNTY BEHAVIORAL HEALTH

Avanzando Juntos Forward Together

RESIDENTIAL CARE FACILITY INCUBATOR INNOVATIONS REPORT FY2022-2023

Prepared by:

EVALCORP
Measuring What MattersSM

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Introduction

This is the Second Annual Innovation Project Report for the Monterey County Innovation Project titled “Residential Care Facility Incubator” (RCFI). On November 1, 2021, the Mental Health Services Oversight and Accountability Commissions (MHSOAC) approved the use of Mental Health Services Act Innovation Component funding for Monterey County Behavioral Health (MCBH) to implement RCFI. This report pertains to activities that took place during FY 2022/2023.

Project Overview

The RCFI project aims to promote interagency and community collaboration regarding mental health services and supports by changing an existing practice in the field. Specifically, the RCFI project will increase the availability of residential care facilities for adults experiencing serious mental illness (SMI) in Monterey County and support those facilities in becoming culturally and linguistically responsive. To do this, MCBH will both seek out existing facility operators and engage new property owners that are interested in providing more culturally and linguistically responsive services. Across two phases, the project will develop and deliver the training and support needed to equip property owners to execute and maintain such services successfully.

The Problem

The RCFI project was developed in response to community and consumer feedback citing a need for (a) programming that embraces individuals’ cultures and experiences, (b) expanded access and quality care in local communities, especially for homeless adults experiencing SMI, and (c) systems-level change to address the housing crisis. In addition to this feedback from community members, an internal review of local resources showed insufficient beds for adults with SMI and a lack of culturally and linguistically responsive residential care services.

In recent years, at least three residential care facilities in Monterey County have closed, resulting in a loss of over 50 beds for adults experiencing SMI. When individuals experiencing SMI are released from higher levels of care but do not have suitable housing, this often leads to another mental health crisis and a return to high-level care, institutionalization, or homelessness. Common barriers to opening and maintaining adult residential care facilities include insufficient finances, lack of community buy-in, and staffing challenges.

In addition, an internal review of residential care facilities for adults experiencing SMI in Monterey County determined that these programs were not designed to respond to their residents' cultural and linguistic needs. For example, while Latinos make up 78% of Medi-Cal beneficiaries, no residential care facilities provide services embracing common Latino cultural traditions. MCBH managers estimate that an additional 150 Adults System of Care consumers would benefit from culturally and linguistically responsive residential care facilities.

To address these issues, some counties have implemented programs that assist consumers in transitioning to a lower level of care or have directly addressed the problem of linking consumers to appropriate housing. However, no programs in California appear to have implemented culturally and linguistically relevant residential care facilities for adults experiencing SMI, and there is no readily available information on how to do so.

The Solution

To increase the availability of culturally and linguistically responsive residential care facilities for adults experiencing SMI, the RCFI project will repurpose residential and commercial properties to support residential care clients and rejuvenate existing facilities that are struggling to operate. The project has two phases:

Phase I: Research & Planning – Identify and develop the necessary training and supports to equip property owners to operate residential care facilities that are culturally and linguistically responsive to the needs of the local SMI population.

Phase II: Implementation – Educate property owners on how to integrate more culturally and linguistically responsive services into their facility. Provide property owners with training and technical assistance related to operating a small business.

Learning Goals

The RCFI project aims to establish culturally and linguistically responsive housing options for adults experiencing SMI in Monterey County. The current funding is for Phase I of the project; Phase I focuses on researching (a) the challenges facing residential care facility operators, and (b) the challenges facing individuals from particular cultural groups who are experiencing SMI. Results from this phase will inform materials and infrastructure to train and support property owners in operating successful culturally and linguistically responsive facilities (in Phase II). Learning goals for Phase I are described below.

1. Describe the attributes of and specific needs for culturally and linguistically responsive residential care facilities that serve the SMI population.
2. Ascertain barriers that prevent residential care facilities from being developed and remaining sustainable.
3. Determine the supports necessary to assist property owners who are already integrated into the community and are interested in turning their property into a residential care facility.
4. Outline the support needed to ensure residential care facilities are financially sustainable for property owners.

- Identify what materials and technical assistance will be required to support implementation in Phase II.

Resources

The RCFI project plan indicates the following personnel will be used to execute Phase I of the project (see section “Project Updates and Changes in FY2022/23” for updates on current resources):

Job Title	Responsibilities
Management Analyst II	Function as Innovation Coordinator to provide/support project management, service coordination, communications and outreach, vendor procurement, evaluation, and reporting activities.
Public Health Epidemiologist I	Participate and collaborate with vendor(s) and stakeholders in Phase I to develop an evaluation plan for Phase II implementation.
Behavioral Health Services Manager II	Monitor and approve vendor deliverables and provide technical assistance on service coordination and other matters as needed.
Behavioral Health Aide	Function as peer specialists to ensure Phase I and Phase II activities will be culturally competent and consumer-driven.
Consultant(s)	Provide subject matter expertise in residential care facility certification and management, supportive housing services, cultural and linguistic competency, marketing, and communications. Research and design a compelling and actionable Phase II implementation plan.

Timeline

The complete timeline for this project will not exceed five years, as required by Title 9 California Code of Regulations (9 CCR § 3910.010). Phase I will occur over a period of 2 years:

- *3-6 Months:* Acquire the necessary consultant(s) and/or vendor(s) through a Request for Proposal (RFP) process.
- *12-18 Months:* Consultant(s) and/or vendor(s) will evaluate opportunities and barriers for implementation and create an actionable implementation plan (i.e., Phase II plan) for incubating cultural and linguistically responsive residential care facilities to mitigate housing instability concerns among the SMI population and positively impact mental health outcomes. Activities to be performed will generally include:
 - Identifying cultural/linguistic needs of the population of focus and identifying/informing corresponding tools and training for residential care facility providers to adequately respond to cultural/linguistic needs of the population of focus that may improve retention and outcomes
 - Investigating known and currently unknown challenges experienced by residential care facility operators in Monterey County and California that negatively impact their sustainability, and identifying solutions via technical assistance, training and/or policy change
 - Identifying and recruiting interested property owners
 - Planning with MCBH to establish a strategy for providing client placements and care coordination

Budget

Phase I of the RCFI project has a total approved budget of \$792,130, allocated as follows:

Budget Category	Year 1	Year 2	Total
Personnel Salaries	\$193,078	\$193,078	\$386,155
Direct Costs	\$171,921	\$171,921	\$343,842
Indirect Costs	\$31,066	\$31,066	\$62,133
Total	\$396,065	\$696,065	\$792,130

Project Updates and Changes in FY 2022/23

After a delay in releasing the Request for Proposal (RFP) due to limited staff capacity within MCBH and the Monterey County Purchasing Department during FY 2021/22, RFP #10889 was

released on February 2, 2023 (Appendix A). In December 2022, a no-cost extension of 18 months was awarded, extending funding through May 1, 2025 (Appendix B).

Housing Tools was selected, and their contract initiated on May 1, 2023. The remainder of FY 2022/23 focused on Project Setup, including:

- Facilitating a Kick-off Meeting with County staff to set scope of work, schedule, assignments, and coordination.
- Initiating the development of a Community Engagement Plan, including community stakeholders list and outreach strategies, and plans to involve existing residential care facility operators and local groups advocating for underrepresented populations.

There have also been changes to the Resources that will be utilized during Phase I. There will no longer be involvement of a Public Health Epidemiologist I or a Behavioral Health Aide. The project will now have support from a Management Analyst III, Deputy Director of Behavioral Health, and Assistant Bureau Chief.

Job Title	Responsibilities
Assistant Bureau Chief	Provide guidance and technical assistance on service coordination and other matters as needed.
Deputy Director of Behavioral Health	Monitor and approve vendor deliverables and provide technical assistance on service coordination and other matters as needed.
Management Analyst III	Function as MHSA Coordinator to provide/support project management, evaluation, and reporting activities.
Management Analyst II	Function as Innovation Coordinator to provide/support project management, service coordination, communications and outreach, vendor procurement, evaluation, and reporting activities.
Consultant(s)	Provide subject matter expertise in residential care facility certification and management, supportive housing services, cultural and linguistic competency, marketing, and communications. Research and design a compelling and actionable Phase II implementation plan.

Evaluation Data

No individuals were engaged in this project, and no activities were conducted during FY 2022/23. Therefore, no evaluation data is available for this period.

Future evaluation data may examine:

- Specific needs of individuals experiencing SMI in Monterey County.
- The efficacy of the proposed model of culturally and linguistically responsive residential care facilities.
- The number and characteristics of property owners interested in participating in the project, and their identified needs.
- Consumers' experience and satisfaction as it relates to cultural and linguistic responsiveness of facilities
- Consumer improvement as identified by the number of homeless days, incarceration rates, emergency room visits, symptom management, substance use, interest in education, and other indicators.

Appendix A – Request for Proposal



**COUNTY OF MONTEREY
CONTRACTS/PURCHASING DIVISION
1488 SCHILLING PLACE
SALINAS, CA 93901
(831) 755-4990**

**REQUEST FOR PROPOSALS
#10889**

**For
Residential Care Facility Incubator Innovation Project
for the County of Monterey**

Proposals are due by 3:00 pm (PST) on March 6, 2023

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SOLICITATION DETAILS SECTION

1.0 INTENT

- 1.1 The County of Monterey Health Department – Behavioral Health Bureau, hereinafter referred to as “County”, is soliciting proposals from qualified organizations, hereinafter referred to as “CONTRACTOR”, to provide research, evaluation and program planning services for the creations and/or sustainability of residential care facilities supporting seriously mentally ill populations.
- 1.2 This solicitation is not intended to create an exclusive service AGREEMENT. Multiple agreement awards may be made as the discretion of the County. County retains the ability, at its sole discretion, to add qualified CONTRACTORS at any time.

2.0 BACKGROUND

- 2.1 The County of Monterey is located on the Central Coast of California, approximately 120 miles south of San Francisco. The County is approximately 3,350 square miles. There are approximately 75 locations throughout Monterey County at which services may be required. Locations include but are not limited to Pajaro, Castroville, Royal Oaks, Salinas, Monterey, Carmel Valley, Marina, Seaside, Prunedale, Aromas, Soledad, King City, and as far South as the San Luis Obispo County border.
- 2.2 Monterey County Behavioral Health Bureau (MCBH) has been awarded funding through the California Mental Health Services Act (MHSA) Innovations component to support the development of an implementation plan to foster the creation and/or sustainability of culturally and linguistically responsive residential care facilities for the unhoused severely mentally ill population within Monterey County. Under the MHSA Innovations component, California counties are encouraged to pilot novel projects capable of improving local mental health systems. The Innovation Project Plan that was awarded funding to support this RFP opportunity seeks to increase interagency collaboration to deliver improved mental health outcomes for adults experiencing serious mental illness (SMI) who are homeless or at-risk of homelessness.
- 2.3 In Monterey County, as with most of California counties, there is declining number of residential care facilities for adults experiencing serious mental illness (SMI), including Board and Care Homes (B&Cs) and Adult Residential Facilities (ARFs). This dwindling stock of supportive housing options for adults with SMI presents a significant challenge and burden on both the client and system as inadequate housing options for people experiencing SMI is linked to a “revolving door scenario” where individuals are released from higher levels of care, but then are unable to find suitable residential care or housing. This often leads to another mental health crisis and a return to high-level crisis programs, facilities, hospitals, jails/prisons, or homelessness. In recent years, 3 B&Cs in Monterey County have closed, resulting in the loss of over 50 beds for adults with SMI. There remains 13 B&Cs in Monterey County to offer a combined 169 total beds for adults experiencing SMI, which is insufficiently low for meeting the needs in the community.

The MCBH Adults System of Care (ASOC), which delivers a spectrum of intensive wrap-around care services to adult SMI populations across Monterey County, currently has an estimated 100 clients under its care who are homeless and additional 50 clients housed in challenging situations who may be interested in and benefit from additional housing resources.

- 2.4 In addition to the need for supporting new and existing residential care facilities, during the community planning process to establish the approved Innovation Project Plan, MCBH community stakeholders also expressed an interest and desire to support residential care facilities that are culturally and linguistically responsive to the needs of Monterey County residents. MCBH stakeholders believed that placing an emphasis on the enhancement of cultural and linguistic responsiveness in residential care facilities will improve the consumer's experience and therefore lead to improved recovery outcomes. Additionally, property owners may be more inclined to open or continue operating a residential care facility for the SMI population if they are encouraged to embrace their cultural and linguistic identity when doing so, in addition to being offered logistical aids and supports via MCBH. Populations that may benefit from culturally and linguistically responsive residential care facilities include various racial and ethnic groups, gender specific groups, LGBTQ groups, transition age youth 18 -25, older adults, and adults with physical disabilities. Notably, while Latinos make up 78% of Medi-Cal beneficiaries, 59.4% of the overall population and 37% of the homeless population in Monterey County, there are no Latino owned and operated residential care facilities, or ones that provide services that embrace common Latino cultural traditions. This represents a major gap in the current viable housing options for Latino adults experiencing SMI.
- 2.5 To achieve the goal of supporting new and existing residential care facilities in Monterey County, and support their ability to be culturally and linguistically responsive to the diverse community members in need, MCBH proposed a two-phased project that will seek out motivated residential care facility operators interested in providing more culturally and linguistically responsive services, as well as engage new property owners interested in establishing new culturally and linguistically responsive residential care facilities. As a result of this project, MCBH hopes to increase the availability of culturally and linguistically appropriate housing for the adult SMI population by repurposing residential and commercial properties to support residential care clients. In addition, existing residential care facilities that are struggling to operate and provide adequate services will be rejuvenated. The two-phases of this Innovation project are:
- 2.5.1 Phase I: Research and Planning – Contractor will research, evaluate and provide program planning services for the creation and/or sustainability of residential care facilities supporting seriously mentally ill populations. This will include identifying the training and supports needed to equip property owners to operate a licensed or unlicensed residential care facility that is culturally and linguistically responsive to the local SMI population will be identified and developed.
- 2.5.2 Phase II: Implementation – Consultants, including peer providers, will educate and train property owners about how to integrate more culturally and linguistically responsive services into their facility. Property owners will also

receive training and technical assistance related to operating a small business. Once established, eligible MCBH ASOC consumers will be referred to these facilities while continuing to receive services through MCBH to achieve their Reaching Recovery® goals.

- 2.6 MCBH currently possesses approval for the use of Innovation funds for Phase I only. Phase I will include in-depth research to better understand the housing challenges facing people with SMI within specific cultural groups in our community, as well as the challenges facing residential care facility operators. Results from the Phase I research will be used to develop the infrastructure and materials to support participating property owners in operating successful culturally and linguistically responsive residential care facilities during the implementation in Phase II

3.0 CALENDAR OF EVENTS

- 3.1 Issue RFP February 2, 2023
- 3.2 Deadline for Written Questions 3:00 p.m., PT, February 16, 2023
- 3.4 Proposal Submittal Deadline 3:00 p.m., PT, March 6, 2023
- 3.5 Notifications of Finalist March 2023
- 3.6 Estimated Notification of Selection March 2023
- 3.7 Estimated AGREEMENT Date April 28, 2023

This schedule is subject to change as necessary.

- 3.8 **FUTURE ADDENDA:** CONTRACTORS, who received notification of this solicitation by means other than through a County of Monterey mailing shall contact the person designated in the COUNTY POINTS OF CONTACT herein to request to be added to the mailing list. Inclusion on the mailing list is the only way to ensure timely notification of any addenda and/or information that may be issued prior to the solicitation submittal date. **IT IS EACH CONTRACTOR’S SOLE RESPONSIBILITY TO ENSURE THAT THEY RECEIVE ANY AND ALL ADDENDA FOR THIS RFP** by either informing the County of their mailing information or by regularly checking the County’s Solicitation Center web page at <https://www.co.monterey.ca.us/government/departments-administrative-office/contracts-purchasing/solicitation-center>. Addenda will be posted on the website the day they are released.

4.0 COUNTY POINTS OF CONTACT

4.1 Questions and correspondence regarding this solicitation shall be directed to:

Primary Contact for the County **Angelica Ruelas**
 Deputy Purchasing Agent
 1488 Schilling Place
 Salinas, CA 93901
 PHONE: (831) 796-3035
 FAX: (831) 755-4969
 Email: ruelasa@co.monterey.ca.us

4.2 All questions regarding this solicitation shall be submitted in writing (E-mail or FAX is acceptable). The questions will be researched, and the answers will be communicated to all known interested CONTRACTORS after the deadline for receipt of questions.

4.3 The deadline for submitting written questions regarding this solicitation is indicated in the **CALENDAR OF EVENTS herein**. Questions submitted after the deadline will not be answered.

4.4 Only answers to questions communicated by formal written addenda will be binding.

4.5 Prospective CONTRACTOR shall not contact County officers or employees with questions or suggestions regarding this solicitation except through the primary contact person listed above. **Any unauthorized contact may be considered undue pressure and cause for disqualification of CONTRACTOR.**

4.6 OPTIONAL - Because of COVID-19, the County of Monterey allows electronic submissions as follows :

4.6.1 County has joined Negometrix, an e-procurement platform, to enhance the safety of our bidders and staff. Please submit your bids electronically at the following link: <https://app.negometrix.com/buyer/585/tenders>

4.6.2 **PLEASE NOTE:** To use this option, CONTRACTORS are required to set up a free account prior to uploading proposals. This will take a few moments; therefore, set up your account at least 24 hours in advance of the bid deadline.

5.0 SCOPE OF WORK

5.1 Contractor Minimum Work Performance Percentage: CONTRACTOR shall perform with its own organization contract work amounting to not less than 50 percent of the original total contract price. However, any designated “Specialty Items” may be performed by subcontract and the amount of any such “Specialty Items” so performed may be deducted from the original total AGREEMENT price before computing the amount of work required to be performed by CONTRACTOR with its organization.

5.2 The Scope of Work includes, but is not limited to the following:

Monterey is seeking one or more qualified consultants to assist in the development of an implementation plan for incubating culturally and linguistically responsive residential care facilities for adults experiencing serious mental illness (SMI) in Monterey County who are currently homeless or at-risk of homelessness.

MCBH will utilize one or more consultants, including peer providers, with expertise in residential care facilities, cultural competency, and small business operations, to research, define and make recommendations on the following elements (with preliminary research questions included in the bullets):

5.2.1 Attributes of a culturally and linguistically responsive residential care facility for the target population

5.2.1.1 What are the staffing requirements (how many bilingual/bicultural staff, etc.)?

5.2.1.2 How can programming respond to specific cultural and linguistic needs of various populations?

5.2.1.3 What cultural and linguistic attributes are missing in existing facilities?

5.2.1.4 What information is available through the California Reducing Disparities Project (CRDP) that may help identify these attributes?

5.3.1 Policies, protocols, and trainings for providing culturally and linguistically responsive residential care facility services to people with SMI in specific population groups.

5.3.1.1 What evidence-based approaches, including those identified by the CRDP or other studies, can be used to respond to the cultural and linguistic needs of specific population groups including Latinos, African Americans, Asian Americans, LGTBQ, Veterans, formerly institutionalized, formerly incarcerated, etc.?

5.4.1 Marketing and recruitment strategy to enroll qualifying property owners.

5.4.1.1 What is the current housing inventory for individuals with SMI relying on SSI?

5.4.1.2 Are there enough interested and willing property owners in Monterey County to enroll in this project and offer a residential care service, to warrant the pursuit of Innovation funds for Phase II?

5.4.1.2.1 Where are these properties located?

- 5.4.1.2.2 Why are owners interested? What is their cultural background and capacity?
- 5.4.1.2.3 What incentives are available to create interest? How will this be communicated?
- 5.4.1.2.4 How can MCBH advertise and reach interested property owners?
- 5.5.1 Establishing and/or operating a licensed or unlicensed residential care facility manual.
 - 5.5.1.1 What are the requirements, barriers, and solutions to the barriers for implementation, including:
 - 5.5.1.1.1 Planning and building ordinances
 - 5.5.1.1.2 Health and human safety
 - 5.5.1.1.3 Security
 - 5.5.1.1.4 Disability rights
 - 5.5.1.1.5 Licensure requirements
 - 5.5.1.1.6 Insurance requirements
 - 5.5.1.1.7 Personnel management
 - 5.5.1.1.8 Supply and logistics
 - 5.5.1.1.9 Provision of care
 - 5.5.1.1.10 Financial (both start-up and ongoing)
 - 5.5.1.1.11 Addressing potential “not in my backyard” issues from neighbors
- 5.6.1 Policies, protocols and trainings relevant to operating a residential care facility and promoting interagency collaboration in the provision of referrals and services.
 - 5.6.1.1 What supports are needed related to the consumer’s ability to pay or otherwise support the property owner to receive reimbursement for the provision of services?
 - 5.6.1.1.1 How will clients know where and how to access SSI?
 - 5.6.1.1.2 How will property owners be reimbursed or receive payment?

5.6.1.2 What are the eligibility criteria for consumers and what is the referral process?

5.6.1.2.1 How can the process ensure consumers are matched to an appropriate residential care facility?

- 5.7 The completion of the above research and analysis will determine if and how implementation will be feasible, community-informed, and efficient.
- 5.8 Engagement and inclusion of community stakeholders in investigating and making recommendations on the above elements will be required.

6.0 CONTRACT TERM

- 6.1 The term of the AGREEMENT(s) will be for a period of 18 months.
- 6.2 If the AGREEMENT includes options for renewal or extension, CONTRACTOR must commence negotiations for any desired rate changes a minimum of 90 days prior to the expiration of the AGREEMENT.
 - 6.2.1 Both parties must agree upon rate extension(s) or changes in writing.
- 6.3 The AGREEMENT shall contain a clause that provides that County reserves the right to cancel the AGREEMENT, or any extension of the AGREEMENT, without cause, with a 30-day written notice, or immediately with cause.

7.0 LICENSING/SECURITY REQUIREMENTS

- 7.1 CONTRACTOR shall ensure that all services, costs, and materials must, at minimum, meet the specifications for State of California and CAL/OSHA regulations, as applicable.
- 7.2 CONTRACTOR is to ensure that insurance and required licenses under both state and local jurisdictions are current during the full term of the AGREEMENT.
 - 7.2.1 You may reference our [Insurance Requirements](#) for additional clarification and samples of required endorsements.
- 7.3 CONTRACTOR will be required to submit appropriate State level criminal background clearance(s) for all personnel required to work within County facilities that are deemed restricted or high security (if applicable).

- 7.3.1 CONTRACTOR shall ensure that a California licensed investigator performed the required State level criminal background check(s) for all staff recommended to the County and must provide proof of such to County prior to the personnel being allowed to work within such County facilities. CONTRACTOR shall be responsible for the cost of these background checks unless otherwise agreed upon in writing by County.
- 7.3.2 A California licensed Investigator must perform the required State level criminal background check(s), which must then be submitted to the County prior to the personnel being allowed to work within such County facilities.

8.0 PROPOSAL PACKAGE REQUIREMENTS

8.1 CONTENT AND LAYOUT:

8.1.1 CONTRACTOR should provide the information as requested and as applicable to the proposed goods and services. The proposal package shall be organized as per the table below; headings and section numbering utilized in the proposal package shall be the same as those identified in the table. Proposal packages shall include, at a minimum, but not be limited to, the following information in the format indicated:

<u>Proposal Package Layout;</u> Organize and Number Sections as Follows:	
Section 1	COVER LETTER (INCLUDING CONTACT INFO)
	SIGNATURE PAGE
	RECEIPT OF SIGNED ADDENDA (IF ANY)
	TABLE OF CONTENTS
Section 2	PROPOSED APPROACH FOR PERFORMING THE SERVICES DESCRIBED IN SECTION 5.0 SCOPE OF WORK
Section 3	PRE-QUALIFICATIONS / LICENSING REQUIREMENTS
Section 4	PROJECT EXPERIENCE AND REFERENCES (Attachment A)
Section 5	PRICING (Attachment B)
Section 6	EXCEPTIONS
Section 7	APPENDIX

Section 1, Requirements:

Cover Letter: All proposals must be accompanied by a cover letter not exceeding two pages that provides the CONTRACTOR’S firm information and contact information as follows:

Contact Info: The name, address, telephone number, and fax number of CONTRACTOR’S primary contact person during the solicitation process through to potential contract award.

Firm Info: Description of the type of organization (e.g. corporation, partnership, including joint venture teams and subcontractors) and its age.

Signed Signature Page and Signed Addenda (if any addenda were released for this solicitation). Any proposal packages submitted without this page will be deemed non-responsive. All signatures must be manual and in BLUE ink. All prices and notations must be typed or written in BLUE ink. Errors may be crossed out and corrections printed in ink or typed adjacent, and must be initialed in BLUE ink by the person signing the proposal.

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Section 2, Proposed Approach for Performing the Services Described in Section 5.0 **Scope of Services:**

- 2.1 CONTRACTOR shall provide detailed description of prior outcomes and successes with similar implementations including:
 - 2.1.1 Examples or demonstrated experience in familiarity with residential care facilities
 - 2.1.2 Housing constraints experienced by severely mentally ill homeless population
- 2.2 CONTRACTOR shall provide detailed outcome and success stories of prior work providing supports services to housing of mentally ill patients.
 - 2.2.1 Performing meaningful research to support decision making on large-scale projects
 - 2.2.2 Engaging community stakeholders, via in-person or virtually
 - 2.2.3 Familiarity with cultural competency components
 - 2.2.4 Ability to deliver project plan document

Section 3, Pre-Qualifications/Licensing Requirements:

- 3.1 CONTRACTOR must acknowledge in writing that it meets all the pre-qualifications and licensing requirements as set forth in Section 7.0 herein.

Section 4, Project Experience & References (Attachment A):

Key Staff Persons: CONTRACTOR shall identify key staff and their qualifications and experience proposed for the service identified herein.

Experience & References: CONTRACTOR shall describe at least 2 similar projects for which it provided services like the scope of work described herein. Please include phone number and email address if possible as the County will conduct reference checks using this information.

Section 5, Pricing (Attachment B):

CONTRACTOR shall complete and submit pricing as per ATTACHMENT B – PRICING SCHEDULE attached hereto.

Warranty: CONTRACTOR shall specify the warranty period for the materials and guarantee the workmanship of all items proposed. After the award, the CONTRACTOR shall promptly remedy all defects without cost to the County that may appear within this period. CONTRACTOR shall also specify if extended warranty is available and submit the extended warranty term period and associated cost.

Section 6, Exceptions:

Submit all exceptions to this solicitation on separate pages, and clearly identify the top of each page with “EXCEPTION TO MONTEREY COUNTY SOLICITATION #10889” (indicate the applicable solicitation number). Each Exception shall reference the page number and section number, as appropriate. CONTRACTOR should note that the submittal of an Exception does not obligate the County to revise the terms of the RFP or AGREEMENT.

Section 7, Appendix:

Appendices: CONTRACTOR may provide any additional information that it believes to be applicable to this proposal package and include such information in an Appendix section.

8.2 **ADDITIONAL REQUIREMENTS:** To be considered “responsive,” submitted proposal packages shall adhere to one of the two following options:

Option 1

Hardcopy and one electronic version of the proposal package:

- 8.2.1 Four sets of the proposal package (one original proposal marked “Original” plus three marked “copy”) shall be submitted in response to this solicitation. Each copy shall include a cover indicating the company name submitting, and reference to “RFP #10889”. **In addition**, submit one electronic version of the entire proposal package on a USB memory stick. Additional copies may be requested by the County at its discretion.
- 8.2.2 Proposal packages shall be prepared on 8-1/2” x 11” paper, preferably duplex printed bound with front and back covers. Fold out charts, tables, spreadsheets, brochures, pamphlets, and other pertinent information or work product examples may be included as Appendices.
- 8.2.3 Reproductions of the Monterey County Seal shall not be used in any documents submitted in response to this solicitation except for the Signature Page.

- 8.2.4 CONTRACTOR shall not use white-out or a similar correction product to make late changes to their proposal package but may instead line out and initial in BLUE ink any item which no longer is applicable or accurate.
- 8.2.5 To validate your proposal package, **submit the SIGNATURE PAGE** (contained herein) **with your proposal**. Proposals packages submitted without that page will be deemed non-responsive. Proposal signature must be manual, in BLUE ink, and included with the original copy of the proposal. Photocopies of the Signature Page may be inserted into the remaining proposal copies. All prices and notations must be typed or written in BLUE ink in the original proposal copy as well. Errors may be crossed out and corrections printed in BLUE ink or typed adjacent, and must be initialed in BLUE ink by the person signing the proposal.

Option 2

OPTIONAL - Electronic Submission Package:

- 8.2.6 The County of Monterey has joined **Negometrix**, an e-procurement platform, to enhance the safety of our bidders and staff during the height of COVID-19.
- 8.2.6.1 Proposals may be submitted electronically using the following link:
<https://app.negometrix.com/buyer/585/tenders>
- 8.2.6.2 **PLEASE NOTE:** To use this option, CONTRACTORS and are required to set up a free account prior to uploading proposals. This will take a few moments; therefore, set up your account at least 24 hours in advance of the bid deadline.
- 8.3 **CONFIDENTIAL OR PROPRIETARY CONTENT:** Qualifications Packages submitted in response to this RFQ are not to be marked, in whole or in part, as confidential or proprietary and must not constitute or contain information that is confidential, proprietary, or trade secret, or subject to any other claim that it is not subject to public disclosure under applicable law. The County may refuse to consider any Qualifications Package so marked. Qualifications Package s submitted in response to this RFQ will become subject to public disclosure per the requirements of applicable law, including but not limited to the California Public Records Act, Government Code Section 6250 et seq, and the Ralph M. Brown Act, Government Code Section 54950 et seq. Please be advised that all information and documents submitted to County by CONSULTANT shall become non-confidential, non-proprietary, non-trade secret, public records without exception and subject to public disclosure by the County at any time without prior notice to CONSULTANT, whether pursuant to a request for disclosure or otherwise, including but not limited to disclosure in the course of County's normal procedures to post on the internet or otherwise make available to the general public documents of interest to the public. All interested CONSULTANTS are advised to consider, when deciding what information to include in their submitted Qualifications Package, that such inclusion will result in the information becoming a fully disclosable public record. The County shall not be liable in any way for disclosure of any such records or part thereof related to this RFQ or any Qualifications Package, including, but not limited to, evaluations, proposals, or any other information or records. In submitting the information and documents, the CONSULTANT is agreeing to the County's release of such information and documents under the Public Records Act or the Brown Act,

without further notice to the CONSULTANT, and is agreeing to release, indemnify, and hold harmless the County from any harm that may result to the Proposer or any third party for release of such information and documents. This release and promise to defend and indemnify is given regardless of whether any exemption from disclosure may be available or might have been claimed under applicable law, and CONSULTANT's responding to this RFQ acknowledge that the decision whether to assert any such exemption will be made in the COUNTY'S sole discretion. Submission by an interested CONSULTANT constitutes a complete waiver of any claims whatsoever against the COUNTY, and/or its agents, officers, or employees, that the COUNTY has violated a vendor's right to privacy, disclosed trade secrets, or caused any damage by allowing the Proposal to be inspected.

Additionally, all Qualifications Packages received by COUNTY in response to this RFQ shall become the exclusive property of the COUNTY. The COUNTY reserves the right, without limitation, to make use of any information or ideas contained in the Proposals submitted. By submitting information and documents to the COUNTY as part of this RFQ, CONSULTANTS acknowledge and agree to the terms of this Section 15.1.

9.0 SUBMITTAL INSTRUCTIONS & CONDITIONS

- 9.1 Submittal Identification Requirements: ALL SUBMITTALS MAILED OR DELIVERED CONTAINING PROPOSAL OR QUOTATION PACKAGES MUST BE SEALED AND BEAR ON THE OUTSIDE, PROMINENTLY DISPLAYED IN THE LOWER LEFT CORNER: **THE SOLICITATION NUMBER RFP #10889 and CONTRACTOR'S COMPANY NAME.**
- 9.2 Mailing Address: Proposal packages shall be mailed to County at the mailing address indicated on the **Signature Page** of this solicitation.
- 9.3 Due Date: Proposal packages must be received by County ON OR BEFORE the time and date specified, at the location and to the person specified on the **Signature Page** of this solicitation. It is the sole responsibility of the CONTRACTOR to ensure that the proposal package is received at or before the specified time. Postmarks and facsimiles are not acceptable. Proposals received after the deadline shall be rejected and returned unopened.
- 9.4 Shipping Costs: Unless stated otherwise, the F.O.B. for receivables shall be destination. Charges for transportation, containers, packaging, and other related shipping costs shall be borne by the shipper.
- 9.5 Acceptance: Proposals are subject to acceptance at any time within 90 days after opening. Monterey County reserves the right to reject any and all proposal packages, or part of any proposal package, to postpone the scheduled deadline date(s), to make an award in its own best interest, and to waive any formalities or technicalities that do not significantly affect or alter the substance of an otherwise responsible proposal package and that would not affect a CONTRACTOR'S ability to perform the work adequately as specified.
- 9.6 Ownership: All submittals in response to this solicitation become the property of the County of Monterey. If a CONTRACTOR does not wish to submit a proposal package

but wishes to acknowledge the receipt of the request, the reply envelope shall be marked “No Bid”.

- 9.7 **Compliance:** Proposal packages that do not follow the format, content and submittal requirements as described herein, or fail to provide the required documentation, may receive lower evaluation scores, or be deemed non-responsive.
- 9.8 **CAL-OSHA:** The items proposed shall conform to all applicable requirements of the California Occupational Safety and Health Administration Act of 1973 (CAL-OSHA).
- 9.9 The award(s) resulting from this RFP will be made to the CONTRACTOR(s) that submit a response that, in the sole opinion of the county, best serves the overall interest of the County.

10.0 SELECTION CRITERIA

- 10.1 The selection of CONTRACTOR and subsequent contract award(s) will be based on the criteria contained in this Solicitation, as demonstrated in the submitted proposal. CONTRACTOR should submit information sufficient for the County to easily evaluate proposals with respect to the selection criteria. The absence of required information may cause the Proposal to be deemed non-responsive and may be cause for rejection.
- 10.2 The selection criteria include the following: **(100 points total)**.

SCORING CRITERIA	Possible Points
Demonstrated experience in conducting research to support projects with a community-wide impact.	10
Provided a detailed research plan or approach for performing the necessary research to deliver a final implementation plan for this project.	20
Demonstrated familiarity or expertise with mental health services system(s), service delivery and/or program planning.	10
Demonstrated familiarity or expertise with Adult Residential Facilities for adults with serious mental illness in California	15
Demonstrated familiarity or experience with cultural and linguistic sensitivity and responsiveness	10
Description and/or examples of approach for communicating with clients	5
Description and/or examples of approach for communicating community stakeholders and/or public agencies	5
Description and/or examples of final project plan formatting	5
Pricing	20
TOTAL	100

- 10.3 **AGREEMENT** award(s) will not be based on cost alone.

- 10.4 The award resulting from this RFP will be made to the CONTRACTOR that submits a response that, in the sole opinion of the County, best serves the overall interest of the County.
- 10.5 The award made from this RFP may be subject to approval by the County Board of Supervisors.

11.0 PRICING

- 11.1 CONTRACTOR(s) will complete **Attachment B – Pricing Schedule** for the provision of services as outlined within this RFP.
- 11.2 CONTRACTOR prices stated in **Attachment B – Pricing Schedule** shall be effective from the date the proposal is submitted to the day the AGREEMENT is awarded and through the initial term of the AGREEMENT.
- 11.3 Prior to the start of each project, the County department and CONTRACTOR(s) will mutually agree upon the budget for the project.
 - 11.3.1 County will provide a defined scope
 - 11.3.2 Pricing may be based upon an hourly rate or by the project, based upon the direction of the user department.
- 11.4 Prices quoted for work assignments must remain in effect for a minimum of thirty (30) days.
- 11.5 Invoicing by CONTRACTOR(s) will clearly itemize but is not limited to the following:
 - 11.5.1 County Department receiving services,
 - 11.5.2 Purchase order number under which the invoice is to be charged,
 - 11.5.3 Services provided,
 - 11.5.4 Dates of services,
- 11.6 Proposals should include any early discounts and/or incentives offered.
- 11.7 Travel/Mileage
 - 11.7.1 Any travel/mileage must be agreed upon and approved by the County in writing prior to services being performed.
 - 11.7.2 Travel/mileage must adhere to the current rate per mile at the time of service as provide by the US General Services Administration. Rates are listed at: <https://www.gsa.gov/travel/plan-book/transportation-airfare-pov-etc/privately-owned-vehicle-pov-mileage-reimbursement-rates>
 - 11.7.3 Travel/mileage fees must be listed as a line-item within the corresponding invoice for associated services.
 - 11.7.3.1 Travel/mileage fees more than the US GSA rate at the time services are provided will not be processed. CONTRACTOR must correct the

invoice containing the incorrect fee to adhere to the current GSA rates at the time of service prior to processing of invoice.

12.0 PREFERENCE FOR LOCAL CONTRACTORS

- 12.1. General Requirements: Each local supplier funded in whole or in part by County funds, or funds which County expends or administers, shall be eligible for a local preference as provided in this section.
- 12.2. Rights of First Refusal: Each local supplier who is within five percent (5%) of the lowest responsible bid and who is otherwise responsive and responsible to the call for bids shall be provided the opportunity to reduce the local supplier's bid to the amount equal to the amount of the lowest responsible bid, if the lowest responsible bid is submitted by other than a local supplier. The opportunity to reduce the amount of the bid shall be provided first to the lowest eligible local supplier and, if not accepted by such local supplier within five (5) business days of the opening of bids, who is within five percent (5%) of the lowest responsible bid. In the event an eligible local supplier reduces the bid to the amount of the lowest responsible bid, the eligible local supplier shall be deemed to have provided the lowest responsible bid and shall be awarded the AGREEMENT.
- 12.3. The foregoing provisions apply only to competitive bids that require that contracts be awarded to the lowest responsible bidder. For contracts awarded pursuant to RFQs or requests for quotations, the awarding authority may consider, as one (1) of the factors in determining the most suitable proposal or quotation, whether or not a local supplier submits the proposal or quotation.
- 12.4. Definitions: For the purpose of this section, the following terms have the meanings indicated:
- 12.4.1. "Area" means Monterey County, San Benito County, and Santa Cruz County.
- 12.4.2. "Bid" includes any competitive bid, whether formal or informal.
- 12.4.3. "Local Supplier" shall mean a supplier doing business in the Area for not less than the past five (5) consecutive years.
- 12.4.4. "Supplier" shall mean a business or resident providing goods, supplies, or professional services.
- 12.4.5. "Local Vendor" means a Vendor for which all of the following criteria apply:
- 12.4.5.1. Vendor either owns, leases, rents or otherwise occupies a fixed office or other commercial building, or portion thereof, having a street address within the Area. Vendor possesses a valid and verifiable business license, if required, issued by a city within the Area or by one of the three counties within the Area when the address is located in an unincorporated area within one of the three counties as defined as "Area"; and

12.4.5.2. Vendor employs at least one full time employee within the “Area”, or if the business has no employees, the business shall be at least fifty percent (50%) owned by one or more persons whose primary residence(s) is located within the “Area”; and

12.4.5.3. Vendor’s business must have been in existence, in Vendor’s name, within the “Area” for at least two (2) years immediately prior to the issuance of either a request for competitive bids or request for qualifications for the County; and

12.4.5.4. Newly established businesses which are owned by an individual(s) formerly employed by a Local Vendor for at least two (2) years also qualifies for the preference; and

12.4.5.5. If applicable vendor must possess a valid resale license from the California Department of Tax and Fee Administration showing vendor’s local address within the “Area” and evidencing that payment of the local share of the sales tax goes to either a city within the “Area” or to one of the three counties within the defined “Area”.

12.5. Link to County’s Local Preference Policy:

<https://www.co.monterey.ca.us/home/showdocument?id=22313>

13.0 INSURANCE REQUIREMENTS

13.1 Evidence of Coverage:

13.1.1 Prior to commencement of an AGREEMENT, CONTRACTOR shall provide a “Certificate of Insurance” certifying that coverage as required herein has been obtained. Individual endorsements executed by the insurance carrier shall accompany the certificate. In addition, CONTRACTOR upon request shall provide a certified copy of the policy or policies.

13.1.2 This verification of coverage shall be sent to the County’s Contracts/Purchasing Department, unless otherwise directed. The CONTRACTOR shall not receive a “Notice to Proceed” with the work under this Agreement until it has obtained all insurance required and the County has approved such insurance. This approval of insurance shall neither relieve nor decrease the liability of CONTRACTOR.

13.2 Qualifying Insurers: All coverages, except surety, shall be issued by companies that hold a current policy holder’s alphabetic and financial size category rating of not less than A-VII, according to the current Best’s Key Rating Guide, or a company of equal financial stability that is approved by the County’s Purchasing Manager.

13.3 Insurance Coverage Requirements:

12.3.1 Without limiting CONTRACTOR’S duty to indemnify, CONTRACTOR shall maintain in effect throughout the term of an AGREEMENT a policy or policies of insurance with the following minimum limits of liability:

- (i) Commercial general liability insurance including but not limited to premises and operations, including coverage for Bodily Injury and

Property Damage, Personal Injury, Contractual Liability, Broad form Property Damage, Independent Contractors, Products and Completed Operations, with a combined single limit for Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence.

Note: any proposed modifications to these general liability insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.

(ii) Automobile Insurance Threshold:

Agreement **Under \$100,000** Business Automobile Liability Insurance: covering all motor vehicles, including owned, leased, non-owned, and hired vehicles, used in providing services under this Agreement, with a combined single limit for Bodily Injury and Property Damage of not less than \$500,000 per occurrence.

OR

Agreement **Over \$100,000** Business Automobile Liability Insurance: covering all motor vehicles, including owned, leased, non-owned, and hired vehicles, used in providing services under this Agreement, with a combined single limit for Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence.

Note: any proposed modifications to these general liability insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.

(iii) Workers' Compensation Insurance, if CONTRACTOR employs others in the performance of this Agreement, in accordance with California Labor Code section 3700 and with Employer's Liability limits not less than \$1,000,000 each person, \$1,000,000 each accident and \$1,000,000 each disease.

Note: any proposed modifications to these workers' compensation insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.

(iv) Professional Liability Insurance: if required for the professional services being provided, (e.g., those persons authorized by a license to engage in a business or profession regulated by the California Business and Professions Code), in the amount of not less than \$1,000,000 per claim and \$2,000,000 in the aggregate, to cover liability for malpractice or errors or omissions made while rendering professional services. If professional liability insurance is written on a "claims-made" basis rather than an occurrence basis, the CONTRACTOR

shall, upon the expiration or earlier termination of this Agreement, obtain extended reporting coverage (tail coverage) with the same liability limits. Any such tail coverage shall continue for at least three years following the expiration or earlier termination of this Agreement.

Note: any proposed modifications to these insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.

13.4 Other Insurance Requirements:

- 13.4.1 All insurance required by an AGREEMENT shall be with a company acceptable to County and issued and executed by an admitted insurer authorized to transact insurance business in the State of California. Unless otherwise specified by an AGREEMENT, all such insurance shall be written on an occurrence basis, or, if the policy is not written on an occurrence basis, such policy with the coverage required herein shall continue in effect for a period of three years following the date CONTRACTOR completes its performance of services under an AGREEMENT.
- 13.4.2 Each liability policy shall provide that County shall be given notice in writing at least thirty days in advance of any endorsed reduction in coverage or limit, cancellation, or intended non-renewal thereof. Each policy shall provide coverage for CONTRACTOR and additional insureds with respect to claims arising from each subcontractor, if any, performing work under an AGREEMENT, or be accompanied by a certificate of insurance from each subcontractor showing each subcontractor has identical insurance coverage to the above requirements.
- 13.4.3 **Commercial general liability and automobile liability policies shall provide an endorsement naming the County of Monterey, its officers, agents, and employees as Additional Insureds** with respect to liability arising out of the CONTRACTOR'S work, including ongoing and completed operations, **and shall further provide that such insurance is primary insurance to any insurance or self-insurance maintained by the County and that the insurance of the Additional Insureds shall not be called upon to contribute to a loss covered by the CONTRACTOR'S insurance.** The required endorsement form for Commercial General Liability Additional Insured is ISO Form CG 20 10 11-85 or CG 20 10 10 01 in tandem with CG 20 37 10 01 (2000). The required endorsement form for Automobile Additional Insured endorsement is ISO Form CA 20 48 02 99.
- 13.4.4 Prior to the execution of an AGREEMENT by County, CONTRACTOR shall file certificates of insurance with County's contract administrator and County's Contracts/Purchasing Division, showing that CONTRACTOR has in effect the insurance required by an AGREEMENT. CONTRACTOR shall file a new or amended certificate of insurance within five calendar days after any change is made in any insurance policy, which would alter the information on the certificate then on file. Acceptance or approval of insurance shall in no way modify or

change the indemnification clause in an AGREEMENT, which shall continue in full force and effect.

- 13.4.5 CONTRACTOR shall always during the term of an AGREEMENT maintain in force the insurance coverage required under an AGREEMENT and shall send, without demand by County, annual certificates to County's Contract Administrator and County's Contracts/Purchasing Division. If the certificate is not received by the expiration date, County shall notify CONTRACTOR and CONTRACTOR shall have five calendar days to send in the certificate, evidencing no lapse in coverage during the interim. Failure by CONTRACTOR to maintain such insurance is a default of an AGREEMENT, which entitles County, at its sole discretion, to terminate an AGREEMENT immediately.

You may reference our [Insurance Requirements](#) for additional clarification and samples of required endorsements.

14.0 CONTRACT AWARDS

- 14.1 No Guaranteed Value: County does not guarantee a minimum or maximum dollar value for any AGREEMENT(S) resulting from this solicitation.
- 14.2 Board of Supervisors: The award(s) made from this solicitation may be subject to approval by the County Board of Supervisors.
- 14.3 Interview: County reserves the right to interview selected CONTRACTOR before a contract is awarded. The costs of attending any interview are the CONTRACTOR'S responsibility.
- 14.4 Incurred Costs: County is not liable for any cost incurred by CONTRACTOR in response to this solicitation.
- 14.5 Notification: All CONTRACTORs who have submitted a Proposal Package will be notified of the final decision as soon as it has been determined.
- 14.6 In County's Best Interest: The award(s) resulting from this solicitation will be made to the CONTRACTOR that submit(s) a response that, in the sole opinion of County, best serves the overall interest of County.

15.0 SEQUENTIAL CONTRACT NEGOTIATION

County will pursue contract negotiations with the CONTRACTOR that submit(s) the best Proposal or is deemed the most qualified in the sole opinion of County, and which is in accordance with the criteria as described within this solicitation. If the contract negotiations are unsuccessful, in the opinion of either County or CONTRACTOR, County may pursue contract negotiations with the entity that submitted a Proposal that County deems to be the next best

qualified to provide the services, or County may issue a new solicitation or take any other action which it deems to be in its best interest.

16.0 AGREEMENT TO TERMS AND CONDITIONS

CONTRACTOR selected through the solicitation process will be expected to execute a formal AGREEMENT with County for the provision of the requested service. The AGREEMENT shall be written by County in a standard format approved by County Counsel, similar to the <https://www.co.monterey.ca.us/home/showdocument?id=81980>. Submission of a signed bid/proposal and the **SIGNATURE PAGE** will be interpreted to mean CONTRACTOR HAS AGREED TO ALL THE TERMS AND CONDITIONS set forth in the pages of this solicitation and the standard provisions included in the **SAMPLE AGREEMENT** Section herein. County may but is not required to consider including language from the CONTRACTOR'S proposed AGREEMENT, and any such submission shall be included in the EXCEPTIONS section of CONTRACTOR'S proposal.

17.0 COLLUSION

CONTRACTOR shall not conspire, attempt to conspire, or commit any other act of collusion with any other interested party for the purpose of secretly, or otherwise, establishing an understanding regarding rates or conditions to the solicitation that would bring about any unfair conditions.

SAMPLE AGREEMENT SECTION

The COUNTY OF MONTEREY STANDARD AGREEMENTS with all terms and conditions (which are hereby incorporated by reference as though set forth entirely herein) may be viewed at: <https://www.co.monterey.ca.us/home/showdocument?id=81980>

-- End of Sample Agreement Section --

ATTACHMENT A: PROJECT EXPERIENCE AND REFERENCES

Please provide at least two references as listed within section 2.

Business Name _____ Contact: _____

City: _____ Phone Number _____

Date of Service: _____

Business Name _____ Contact: _____

City: _____ Phone Number _____

Date of Service: _____

Business Name _____ Contact: _____

City: _____ Phone Number _____

Date of Service: _____

Business Name _____ Contact: _____

City: _____ Phone Number _____

Installation Date of Service: _____

-- End of Attachment A --

ATTACHMENT B: PRICING SCHEDULE

Enter applicable pricing table/fee schedule here.

-- End of Attachment B --

ATTACHMENT C: LOCAL BUSINESS DECLARATION FORM

COUNTY OF MONTEREY LOCAL BUSINESS DECLARATION FORM

If a business entity is claiming to be a “Local Vendor” as defined by the “Monterey County Local Preference Policy,” adopted by the Monterey County Board of Supervisors on August 29, 2012, it must certify it meets the definition of “Local Vendor” as defined and in accordance with the adopted policy. Any business entity claiming to be a local business as defined by the policy, shall so certify, in writing herein, that it meets all of the criteria listed within the policy, which can be accessed online at the following link:
<https://www.co.monterey.ca.us/home/showdocument?id=22313>.

“Local Vendor” is defined as follows:

1. Vendor either owns, leases, rents or otherwise occupies a fixed office or other commercial building, or portion thereof, having a street address within the Area. Vendor possesses a valid and verifiable business license, if required, issued by a city within the Area or by one of the three counties within the Area when the address is located in an unincorporated area within one of the three counties as defined as "Area"; **and**
2. Vendor employs at least one full time employee within the "Area", or if the business has no employees, the business shall be at least fifty percent (50%) owned by one or more persons whose primary residence(s) is located within the "Area"; **and**
3. Vendor's business must have been in existence, in Vendor's name, within the "Area" for at least two (2) years immediately prior to the issuance of either a request for competitive bids or request for qualifications for the County; **and**
4. Newly established businesses which are owned by an individual(s) formerly employed by a Local Vendor for at least two (2) years also qualifies for the preference; **and**
5. If applicable vendor must possess a valid resale license from the State Franchise Tax Board showing vendor's local address within the "Area" and evidencing that payment of the local share of the sales tax goes to either a city within the "Area" or to one of the three counties within the defined "Area".

County shall not be responsible or required to verify the accuracy or any such certifications and shall have sole discretion to determine if a bidder meets the definition of "local vendor" as provided herein.

Any business which falsely claims a preference pursuant to Monterey County Local Preference Policy shall be ineligible to bid on County purchases or contracts for a period of three (3) years from the date of discovery of the false certification(s).

Any business eligible for the local preference who desires to have the preference applied during the award selection process shall return this completed Local Business Preference Declaration form with its proposal or qualifications package response. Upon request, bidder agrees to provide additional information to substantiate this certification.

As per the policy: "Area" shall mean Monterey County, San Benito County, and Santa Cruz County.

Note: If applicable your organization must possess a valid resale license from the California Department of Tax and Fee Administration showing its local address within the "Area" and evidencing that payment of the local share of the sales tax goes to either a city within the "Area" or to one (1) of the three (3) counties within the defined "Area."

On behalf of my business entity (i.e., organization) I certify under penalty of perjury that I have both read and confirm that my business entity meets the requirements as outlined within the County's Local Preference Policy for the procurement in question.

Business Legal Name (and dba name if any): _____

Business Address: _____

City: _____ ***State:*** _____ ***Zip Code:*** _____

Signature of Authorized Representative: _____ *Date:* _____

Title of Authorized Representative: _____

Telephone Number: (____) _____ *E-Mail:* _____

This form must be submitted within a bidder’s proposal or qualifications package in order for the County to apply the applicable local preference.

Bidders who do not qualify as a local business as per the policy should not submit this form.

-- End of Attachment C --

SIGNATURE PAGE

COUNTY OF MONTEREY
CONTRACTS/PURCHASING DIVISION

RFP # **10889**
ISSUE DATE: February 2, 2023



RFP TITLE: RESIDENTIAL CARE FACILITY INCUBATOR INNOVATION PROJECT

PROPOSALS ARE DUE IN THE OFFICE OF THE CONTRACTS/PURCHASING OFFICER BY
3:00 P.M., LOCAL TIME, ON March 6, 2023

MAILING ADDRESS:
COUNTY OF MONTEREY
CONTRACTS/PURCHASING OFFICE
1488 SCHILLING PLACE
SALINAS, CA 93901

QUESTIONS ABOUT THIS RFP SHOULD BE DIRECTED TO
RUELASA@CO.MONTEREY.CA.US, (831) 796- 3035

CONTRACTOR MUST INCLUDE THE FOLLOWING IN EACH PROPOSAL (1 original plus 3 copies):

ALL REQUIRED CONTENT AS DEFINED PER SECTION 8.1 HEREIN

This Signature Page must be included with your submittal to validate your proposal.
Proposals submitted without this page will be deemed non-responsive.

CHECK HERE IF YOU HAVE ANY EXCEPTIONS TO THIS SOLICITATION.

CONTRACTOR MUST COMPLETE THE FOLLOWING TO VALIDATE PROPOSAL

I hereby agree to furnish the articles and/or services stipulated in my proposal at the price quoted, subject to the instructions and conditions in the Request for Proposal package. I further attest that I am an official officer representing my firm and authorized with signatory authority to present this proposal package.

Company Name: _____ Date _____

Signature: _____ Printed Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: () _____ Fax: () _____ Email: _____

License No. (If applicable): _____

License Classification (If applicable): _____

Appendix B – No-Cost Extension



STATE OF CALIFORNIA
GAVIN NEWSOM, Governor

MARA MADRIGAL-WEISS
Chair
MAYRA E. ALVAREZ
Vice Chair
TOBY EWING
Executive Director

December 21, 2022

Katy Eckert
Director-Monterey County
1270 Natividad Road
Salinas, CA 93906

Dear Ms. Eckert,

Thank you for your notification dated December 20, 2022, for the time extension of 18 months for Monterey County's **Residential Care Facility Incubator**, which was originally approved on November 1, 2021, for \$792,130 in Innovation funding for two (2) years.

Per your letter, you have informed us that the start date for this project was on November 21, 2021. With this time extension of 18 months the end date for this project will be no later than May 1, 2025, for a total period of three (3) years and six (6) months. No additional funding was requested.

On behalf of the Commission, I would like to thank you for all the work you do in your community.

If you have additional questions or need further assistance, feel free to contact me sharmil.shah@mhsoac.ca.gov or your county liaison vicque.kimmel@mhsoac.ca.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read "Sharmil Shah", with a long horizontal line extending to the right.

Sharmil Shah, Psy.D
Chief-Program Operations

Cc: Wesley Schweikhard, Innovation Coordinator
Shannon Castro, MHSA Coordinator