

Request for Proposals # 816

Community Living Fund (CLF) Program



Date issued:

OCTOBER 12, 2018

Pre-proposal conference:

OCTOBER 22, 2018; 10:00 AM (PST)

Proposal due:

NOVEMBER 13, 2018; 5:00 PM (PST)

Request for Proposals # 816 for Community Living Fund

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I. Introduction and Schedule

A. General

The San Francisco Human Services Agency (HSA) Department of Aging and Adult Services (DAAS) is seeking non-profit agencies and other organizations to provide services to older adults and adults with disabilities through the Community Living Fund (CLF) Program. The intent of the CLF Program is to reduce unnecessary institutionalization by providing older adults and younger adults with disabilities with options for where and how they receive assistance, care and support, through case management and other services. No individual willing and able to live in the community should be institutionalized because of a lack of community-based long-term care and supportive services. The CLF Program funds services, or a combination of goods and services, that will help individuals who are currently in or at imminent risk of being institutionalized. The CLF Program is consistent with the goals of the Community Living Fund which are to:

- Enable older adults and adults with disabilities who are eligible to remain living safely in their own homes and communities as long as possible.
- Provide financial support for home and community-based long-term care and supportive services beyond what is currently available.
- Offer flexible funding to create “wrap-around” services that provide essential community-based assistance, care and support
- Facilitate the development of service delivery models that strengthen the community-based long-term care systems and work force.
- Expand, not supplant, existing funding, in order to fill funding gaps until new sources of financial support for community-based long-term care services can be secured through federal Medicaid waivers and other means.

The CLF Program is fully operational under a current grant agreement that will sunset June 30, 2019. This contract shall have an original term of five (5) years effective from July 1, 2019 to June 30, 2024. These services will be supported through funding from the City and County of San Francisco and Federal grants and is estimated to be \$4,600,000 annually. It is anticipated that grant award will be made to a single Agency working in collaboration with other agencies or community-based organizations through subcontracts to provide the necessary variety of expertise and skills in order to: (1) provide the case management services, staff, and organizational infrastructure; and (2) manage the CLF Program dollars to provide needed goods, services, equipment and other resources not available through other means. Expertise in a variety of areas is essential to the effective management of the CLF Program. These may include, but are not limited to the older adults, adults with disabilities, mental health and substance abuse services, and housing.

B. Schedule

The schedule for this RFP is:

<u>Proposal Phase</u>	<u>Date</u>
RFP is issued by the City	<u>OCTOBER 12, 2018</u>
Pre-proposal conference	<u>OCTOBER 22, 2018; 10:00 AM (PST)</u>
Deadline for submission of written questions or requests for clarification	<u>OCTOBER 24, 2018; 5:00 PM (PST)</u>
Proposals due	<u>NOVEMBER 13, 2018; 5:00 PM (PST)</u>

Dates and times subject to change

C. Definitions

ADL	Activities of Daily Living: eating, dressing, transfer, bathing, toileting, and grooming
Adults with Disabilities	An individual who is 59 years of age or younger with a disability.
BAA	Business Associate Agreement
CARBON	Contracts Administration, Reporting and Billing On Line System
Case Management	Case management is a formal strategy that coordinates and facilitates access to a variety of services in a timely manner for people who need assistance in organizing and managing their care and/or supportive services. It includes a standardized process of client intake, assessment, care planning, care plan implementation, monitoring, reassessment and discharge/termination. This includes intensive case management services which may require frequent visits and follow up depending on care needs. Case management is an integral component of long-term care service delivery and is central to accessing additional services through the CLF Program.
Community Living Fund	The Community Living Fund (CLF), or “the Fund”, was created in the San Francisco Administrative Code Section 10.100-12 to support aging in place and community placement alternatives for individuals who may otherwise require care within an institution. DAAS oversees the administration of the Fund.

Community Living Fund Program	Funded by CLF, the CLF Program provides for home- and community-based services, or a combination of equipment and services, that will help those who are currently, or at risk of being, institutionalized to continue living independently in their homes, or to return to community living. This program, using a two-pronged approach of coordinated case management and purchased services, provides the needed resources, not available through any other mechanism, to vulnerable older adults and adults with disabilities.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: <ol style="list-style-type: none"> 1. Self-Care - Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); 2. Capacity for independent living and self-direction; 3. Cognitive functioning and emotional adjustment.
HIPAA	Health Insurance Portability and Accountability Act
HSA	Human Services Agency of the City and County of San Francisco
Imminent Risk of Institutionalization	The circumstances in which an individual is no longer able to live on their own, even with supportive services, and needs placement in a licensed residential care facility. An individual must have, at a minimum, one of the following: <ul style="list-style-type: none"> -functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or -a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or -be unable to manage his/her own affairs due to emotional and/or cognitive impairment.
MOU	Memorandum of understanding: describes a bilateral or multilateral agreement between two or more parties.
Older Adult	An individual who is 60 years of age or older

SOGI Data Collection	Sexual Orientation and Gender Identity data collection is a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
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D. Target Population

The CLF Program prioritizes eligible individuals who are transitioning from residential care facilities to community settings. The CLF Program also serves eligible individuals living in the community who are at imminent risk of institutionalization.

CLF Eligibility: In order to obtain services, an individual must, at a minimum, be:

- 18 years or older;
- Institutionalized or deemed, at assessment, to be at imminent risk of being institutionalized;
- A resident of San Francisco;
- Willing and able to live in the community with appropriate supports; and
- At an income level of 300% of federal poverty or less plus assets up to \$6000.

Further, an individual must have a demonstrated need for a service and/or resource that will serve to prevent institutionalization or enable community living. Specific conditions or situations such as substance abuse or chronic mental illness shall not be a deterrent to services if the eligibility criteria are met. As a fund of last resort, all viable options must be considered and exhausted.

Target Population: The following groups of people will be served:

- The first priority will be patients of Laguna Honda Hospital and San Francisco General Hospital who are willing and able to be discharged to community living.
- Patients at other San Francisco acute care hospitals and skilled nursing facilities.
- Nursing home eligible individuals on the Laguna Honda Hospital waiting list (some of whom are at San Francisco General Hospital and other hospitals) who are willing and able to remain living in the community.
- Individuals who are at imminent risk for nursing home or institutional placement, willing and able to remain living in the community with appropriate support.

Imminent Risk of Institutionalization: In order to be considered “at imminent risk of institutionalization”, an individual must have, at a minimum, one of the following:

- functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or
- a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or be unable to manage his/her own affairs due to emotional and/or cognitive impairment.

II. Scope of Work

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Respondents should use this description when designing their proposed programs. However, respondents may suggest modifications and/or additions that will, in their estimation, make the program more feasible or effective. The description below outlines the key program elements and services the selected vendor(s) will provide.

A. Description of Services

Program infrastructure must include, at a minimum:

- Administrative capabilities including but not limited to: data entry, database maintenance, invoice processing, and vendor payment.
- Purchased service vendor contracts and procurement policies.
- Clinical supervision across all sub-contracted agencies.
- Standard accounting practices and reporting functions.
- A dedicated database to capture care planning, case management, client information tracking, purchased services and dollars spent to help older adults and younger adults with disabilities remain living in the community. Documentation is coordinated between all sub-contracted agencies to ensure that necessary data is reported consistently. The CLF Program database communicates with the DAAS databases, including Integrated Intake and Integrated Housing database, which access data from multiple City programs and departments.

Case Management Component

Respondent will demonstrate experience and capacity to provide different levels of case management services including intensive case management service, moderate to minimal assistance, as well as access to one-time resources and services. These levels of case management allow flexibility to tailor to individual needs to ensure stabilization and to avoid premature hospitalization and/or institutionalization.

Purchase of Services Component

Respondent will demonstrate experience and capacity to manage purchased goods and services for clients, including those of their sub-contractors. The CLF Program will support a menu of service options and level of assistance, care, and support, and a range of housing, and supportive services. These services must be deemed necessary by a CLF case manager and the funds are only used as a last resort, when all other payment options for that service have been exhausted. The CLF Program will access and leverage state and federal funds whenever possible, and incorporate processes in CLF policies and procedures. Purchased services will supplement other available resources to ensure that each client receives the comprehensive array of appropriate services that are necessary to allow for community living.

In addition, respondent will demonstrate the ability to comply with and/or have experience to meet following requirements under this procurement:

Respondent will:

- Work with the DAAS Benefits and Resources Hub. All referrals to the CLF Program come through the DAAS Benefits and Resources Hub, which is the initial entry point for accessing the fund. This Hub is the “central door” of the “No Wrong Door” model of improved access to services. While community-based long-term care services can be accessed in many ways, CLF is the fund of last resort and all requests for support from the CLF Program must come through this Hub. DAAS Benefits and Resources Hub completes an initial screening and refers those presumed eligible for the fund to the CLF Grantee.
- Manage a waitlist with strategic decision making with DAAS for financial considerations, prioritizations, and trends.
- Coordinate all case management services through clinical supervision; including collaboration between multidisciplinary staff, across all sub-contracted organizations, through weekly scheduled case conferencing. There must be strong collaboration to share expertise.
- Work collaboratively with other community organizations presently working with the client and additional ones who can provide specific expertise. When working in collaboration with other agencies or community-based organizations through sub-contracts or MOUs/BAAAs, respondent will assure that they will have staffing and experience in the appropriate areas.
- Ensure that the purchase of all proposed goods and services is reasonable, prudent and properly procured following clearly written internal fiscal policies and procedures.
- Work collaboratively with DAAS Long Term Care Director to strategize program direction. .
- Develop and maintain collaborations with both City departments and community programs in order to reach the target population that is eligible for the services supported by the CLF program.
- Conduct multidisciplinary meetings with stakeholders and partners monthly or as needed for the purposes of transitioning clients to the community and/or forwarding the mission of CLF.
- Support a CLF Advisory Council to provide a forum for consumer and community feedback. Members should include current and former program participants, representatives from community agencies, as well as a population representative of San Francisco.
- Conduct activities that measure program impact such as participant improvements and outcomes in their quality of life as a result of program participation. These activities are conducted annually (at a minimum) to gather additional input from participants regarding their direct experience in an anonymous format.
- Work closely with HSA Planning Unit staff to ensure appropriate and accurate collection of data for evaluation and program design analysis as well as with DAAS in an ongoing evaluation of the program.
- Utilize the CLF dedicated database--developed with RTZ Associates Inc. for the CLF program that tracks client information, assessments, care plans, progress notes, service authorizations and purchased services.

- Able to manage complex billing with strong fiscal management, including the ability to leverage state and federal funding available through programs such as the Community Services Block Grant (CSBG) Program, Community Care Transitions (CCT), In-Home Operations (IHO), and the Home and Community-Based Alternatives (HCBA) Waiver. .
- Conduct Client and Provider Impact Surveys detailing program impacts such as improvements in participant health outcomes and/or quality of life as a result of program participation.

The Community Living Fund Annual Plan for FY 18/19 is provided to assist interested vendors in better understanding the function of the CLF Program as well as define the target populations served. Please note: Grantees entering into agreements with HSA must commit to fulfilling the reporting requirements that correspond with the applicable state, federal, and/or grant funding the contract. In the event the Grantee fails to fulfill these requirements, HSA will direct the Grantee to reduce its budget accordingly and/or terminate the contract. The funding available for a given contract can vary for multiple reasons including those outside of HSA and Grantee's control, including reduction of participant funding at the state or federal level for contracted activities. Regardless of the reason, HSA may need to instruct the Grantee to adjust its budget. These adjustments, if needed, would occur on an annual or semi-annual basis (depending on magnitude of change and service impact). Grantees receiving payment from HSA to provide the services under this RFP will be required to track staff time expended through a time study web application to identify time spent on claimable activities. All costs that are for direct client services must be separately invoiced or separately identified and paid against separate index code from Community Services Block Grant (CSBG) claimable costs.

B. Objectives

Respondents should state in measurable, quantifiable terms the service and outcome objectives they will achieve in providing these services. The major purpose of objectives is to measure quantity, quality, and impact of services. In measuring these areas, a balance should be created between the value of the information and the time/effort required to collect the information. The objectives stated in the proposal may be incorporated as part of the program's evaluation plan. The objectives should be specified in the proposals to match the services to be provided.

Service Objectives

As part of the proposal, the respondent will be required to develop specific service objectives that measure the quantity and other aspects of services. The objectives should state the target quantities and match the program services as proposed.

Examples of performance measures may include the following:

On an annual basis, Grantee will meet the following service objectives:

Objective 1: Number of unduplicated consumers receiving intensive case management and/or purchased services. **Target = 425.**

Objective 2: Number of clients newly enrolled in CLF. **Target = 175.**

Outcome Objectives

As part of the proposal, the respondent will be required to develop specific outcome objectives that demonstrate and measure the impact, outcomes, or results of services. Both quantitative and qualitative analysis shall be applied to measure program efficiency and effectiveness. The outcome objectives specified below will be required for each contract.

DAAS is committed to measuring the impact of its investments in community services. Examples of outcome measures may include the following. On an annual basis and as needed, Grantee will report progress towards meeting the following outcome Objectives:

- Objective 1:** Successfully support community living for a period of at least six months for at least 80% of CLF clients who are being discharged from LHH at the time of enrollment. Identify reasons for re-institutionalization when it occurs.
- Objective 2:** 80% of care plan problems resolved, on average, after one year of enrollment in CLF (excluding clients with ongoing purchases).
- Objective 3:** 80% of respondents believe that CLF services helped maintain or improve their ability for successful community living.

C. Reporting requirements

Grantee will provide various reports during the term of the grant agreement.

1. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as outlined in the negotiated Scope of Services. This report will also include accomplishments and challenges encountered by the Grantee. This report is due 45 days after the completion of the program year.
2. Per program documentation best practices but no later than on a monthly basis, Grantee will enter all required data on the CLF GetCare and comply with reporting timelines such as for CLF reporting requirements, including the CLF 6-Month Report.
3. On an annual basis, Grantee will provide results of the Client and Provider Impact Surveys which details the program impacts such as improvements in participant health outcomes and/or quality of life as a result of program participation. This may or may not be provided at the same time as the annual report.
4. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
5. Quarterly and Annual Reports will be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system.

6. Grantee shall develop and deliver ad hoc reports as requested by HSA.
7. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
9. Grantee will become a DAAS Business Associate and able to sign and comply with the Business Associate Agreement.
10. Apart from the on-line reporting via CLF GetCare and CARBON, all other reports should be sent to the following addresses:

Carrie Wong, Program Manager
Long-Term Care Operations
Department of Aging and Adult Services
PO Box 7988
San Francisco, CA 94120
Carrie.Wong@sfgov.org

David Kashani, Contract Manager
Office of Contracts Management
Human Services Agency
PO Box 7988
San Francisco, CA 94120
David.Kashani@sfgov.org

III. Submission Requirements

A. Time and Place for Submission of Proposals

Proposers shall submit one (1) electronic pdf copy of the proposal to HSARFP@sfgov.org or David.Kashani@sfgov.org. Electronic file title should include RFP number, agency name, number of files submitted i.e. 1 of 4. Proposals must be received by **5:00 p.m.**, on **November 13, 2018**. Late submissions will not be considered. Supplemental documents or revisions after the deadline will not be accepted.

Department staff will confirm receipt of all Respondent submissions within one (1) working day after the deadline for receipt noted above.

B. Format

For word processing documents, text should be single or double spacing, unjustified (i.e.,

with a ragged-right margin) using a 12 point serif font (e.g., Times Roman, and not Arial), and page margins should be at least 1” on all sides (excluding headers and footers). Submissions may be either single or double sided, but note that counted pages are considered by page number, therefore double sided submissions are considered two (2) pages.

C. Content

Organizations interested in responding to this RFP must submit the following information, in the order specified below. All proposals for funding must be developed using the format below. This is necessary so that all proposals can receive fair and equal evaluation. Proposals not following the required format will not be considered for funding. Information must be at a level of detail that enables effective evaluation and comparison between proposals by the Proposal Evaluation Panel. The Agency must ensure that the proposal addresses the Selection Criteria.

1. **Table of Contents**

Each proposal package should contain a complete table of contents showing page numbers. All pages in the package must be numbered consecutively, and major sections must be indexed.

2. **RFP Cover Page – (use form provided in Section X)**

Submit the cover page signed by a person authorized to obligate the organization to perform the commitments contained in the proposal. Submission of this document will constitute a representation by the organization that the organization is willing and able to perform the commitments contained in the proposal.

3. **Minimum Qualifications –up to 3 pages**

All agencies submitting proposals for funding must provide a *Minimum Qualifications Narrative* describing in detail how the proposing agency meets each of the Minimum Qualifications. Any proposals failing to demonstrate these qualifications will be considered non-responsive and will not be eligible for proposal review or award of grant. (refer to section IV, Item A)

4. **Contracts (both public and private) –up to 2 pages**

Agencies should submit a statement listing relevant contracts with a description of the services which have been completed during the last three (3) years. The statement must also list any failure or refusal to complete a contract, including details and dates. Provide disclosure of any litigation including Respondent, subcontracts, or any principal officers thereof in connection with any contract or grant.

5. **Organizational Capacity –up to 7 pages (not including resumes, job descriptions, and letters of reference)** Description of your agency’s ability to deliver the services proposed in this RFP.

In addition, please address the following:

- a) Staffing Plan – Describe organizational structure and staffing patterns needed to provide the proposed services including program supervision and management. Attach job descriptions and resume of key program staff and clearly identify which staff position they occupy and provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City’s prior approval.

- Clearly identify whether services will be performed by existing staff or by proposed staff.
- b) Description of agency experience and staff skills related to working with the identified target population and program design.
 - c) Description, including examples, of the agency's experience related to collaboration on projects that demonstrate collaborative success including achievement of goals.
 - d) Service Site Plan – Describe the plan for location and hours of services and how target caseload capacity will be accommodated.
 - e) Description of staff training plans to ensure services are provided in an efficient manner and service and outcome objectives are being achieved.
 - f) Description of agency's ability to comply with requirements to provide time certifications for staff involved in service delivery and service support activities.
 - g) Letters of reference (minimum of two required). Letters must be on agency letterhead and include, at minimum, the name, title, telephone number and e-mail address of the individual providing the reference. References from HSA staff and/or clients of services are not permitted.

6. **Program Approach –up to 12 pages**

Description of your agency's specific program approach to deliver the services proposed in this RFP.

In addition, please address the following:

- a) Description of your agency's specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives).
- b) Identify the proposed site that will be made available for the target population.
- c) Identify any subcontractors and describe their responsibilities in the delivery of services/shelter space.
- d) List and explain the specific service and outcome objectives to be accomplished through the proposal.
- e) Describe methods for data collection, documentation, and reporting service and outcome data. Describe the method(s) by which service and outcome objectives will be evaluated.
- f) Describe the linkages that will link clients to services.
- g) Describe the proposed model for clients to offer input regarding program operations.
- h) Describe the ability to be flexible with and responsive to DAAS with regard to programming or policy priorities in managing local, state, and federal initiatives.

7. **Fiscal Capacity (Budget) –up to 4 pages (excluding justification, cost allocation plan and audited financial statement)**

Please refer to the instructions outlined in Section XII and use only HSA approved budget forms. Provide Cost Allocation Plan and current audited financial statements. The SF Human Services Agency intends to award this grant to respondents that it considers will provide the best overall program services at a reasonable pricing structure. The SF Human Services Agency reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Using the budget forms, please provide the direct expenses for all proposed costs to be supported through this grant for a two-year term. Respondents must also provide a budget narrative that clearly explains the basis for each expense listed on the budget forms.

Discuss planned leveraging of other resources (i.e., fund raising, in-kind contributions, etc.), if any, to support the program approach proposed. Identify external resources committed to this program, including in-kind resources designated solely for this program. Assign a dollar value for all external resources.

8. **Completed Page Number Form (refer to Section XI)**

IV. Evaluation and Selection Criteria

A. Minimum Qualifications

In order to be considered for this RFP, respondents must possess the following minimum qualifications listed below.

- A minimum of three (3) years of same or similar services to those requested in this RFP.
- A minimum of three (3) years serving the target population. These populations may include, but are not limited to: older adults, younger adults with disabilities, those with mental health and substance use issues and housing needs.
- Demonstrated ability to provide cultural and linguistically appropriate services to the target population.
- Must be willing and able to comply with the City contracting requirements set forth in Section VII of this RFP
- Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.
- Able to become a Business Associate of DAAS, and sign a Business Associate Agreement and adhere to all privacy laws and have HIPAA-compliant practices.

Any response that does not demonstrate that the respondent meets these minimum qualifications by the deadline for submittal of Proposals will be considered non-responsive and will not be eligible for award of the contract.

Please note: Respondents submitting proposals that have previously been contracted by the City and County of San Francisco to provide goods and/or services must successfully demonstrate compliance with performance/monitoring requirements specified in previous grants/contracts (corrective actions) in order to be considered responsive to this RFP. **Documented failure to correct performance/monitoring deficiencies identified in past City and County grants/contracts may result in Agency disqualification to participate in this RFP.**

B. Selection Criteria

The proposals will be evaluated by a selection committee comprised of parties with expertise in the service areas identified in this RFP. The City intends to evaluate the proposals generally in accordance with the criteria itemized below.

Total Possible Points: 100

Organizational Capacity (35 points)

Demonstrate expertise of the organization necessary to complete the tasks, including quality of recently completed projects that meet the requirements and adhere to schedules. Demonstrate appropriate experience, professional qualifications and education of staff assigned to the project, a realistic description of the tasks to be performed by each staff person, reasonable workload and work schedule, staff availability, and accessibility.

Description of your agency's ability to deliver the services proposed in this RFP. In addition, please address the following:

1. Staffing Plan – Describe organizational structure and staffing patterns needed to provide the proposed services including program supervision and management. Attach job descriptions and resume of key program staff and clearly identify which staff position they occupy and provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval. (10 Points)
2. Service Site Plan – Describe the plan for location and hours of services and how target caseload capacity will be accommodated. (5 Points)
3. Description of staff training plans to ensure services are provided in an efficient manner and service and outcome objectives are being achieved. (10 points)
4. Description of agency experience and staff skills related to successful collaboration and management of complex data. (5 points)
5. Complete the Disability Checklist. (5 points)

Program Approach (40 points)

Description of your agency's specific program approach to deliver the services proposed in this RFP. In addition, please address the following:

1. Description of your agency's specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives).(10 Points)
2. Description of your agency's experience and ability to manage complex fiscal operations, specifically for the purchases of service component as well as time-studies, and local/state/federal reimbursements. (10 Points)

3. List and explain the specific service and outcome objectives to be accomplished through the proposal. (5 Points)
4. The proposal demonstrates the capacity to partner and collaborate with both the public entities and private partners demonstrated through existing partnerships, diversity of board governance, policy and practice through technology, communication, shared services and/or governance structure. (5 points)
5. Describe methods for data collection, documentation, and reporting service and outcome data. Describe the method(s) by which service and outcome objectives will be evaluated. (5 Points)
6. Describe the proposed model for clients to offer feedback and input regarding services. (5 Points)

Fiscal Capacity (25 points)

1. The budget provided is clear and easy to understand. The budget reflects sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate). The budget supports the services proposed and is competitive with other proposals. Costs are reasonable, justified, and competitive. Cost Allocation Plan is reasonable. (20 points)
2. Respondent's ability to leverage other resources for this program, either from in-kind, and/or external resources. The proposal reflects the effective use of organizational resources/external resources, including leveraged funds, designated exclusively for this program. (5 points)

V. Pre-proposal conference and Contract award

A. Pre-Proposal Conference

Proposers are encouraged to attend a pre-proposal conference on **October 22, 2018, at 10 a.m.** to be held at 1650 Mission Street Suite #300, Contracts Conference Room. All questions will be addressed at this conference and any available new information will be provided at that time. If you have further questions regarding the RFP, please contact the individual designated in Section VI.

B. Contract Award

The Human Services Agency will select a proposer with whom Agency staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the City of all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time the Human Services Agency, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin contract negotiations with the next highest ranked proposer.

C. Written Questions

Proposers are encouraged to submit written questions before the due date stated in Section I.B. to the individual designated in Section VI.B. All questions will be addressed and any available new

information will be provided in writing via email to proposers. All written questions must be submitted on or prior to October 24, 2018 @ 5:00pm to HSARFP@sfgov.org or David.Kashani@sfgov.org.

VI. Terms and Conditions for Receipt of Proposals

A. Errors and Omissions in RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the Department, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the Department promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

B. Inquiries Regarding RFP

Inquiries regarding the RFP and all oral notifications of intent to request written modification or clarification of the RFP, must be directed to:

David Kashani, GB13
Office of Contract Management
San Francisco Human Services Agency
1650 Mission Street, Suite 300
San Francisco, CA 94103
contract.manager@sfgov.org

C. Objections to RFP Terms

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

D. Change Notices

The Department may modify the RFP, prior to the proposal due date, by issuing Change Notices, which will be posted on the website. The proposer shall be responsible for ensuring that its proposal reflects any and all Change Notices issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the proposer consult the website frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Change Notices.

E. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

F. Revision of Proposal

A proposer may revise a proposal on the proposer's own initiative at any time **before the deadline** for submission of proposals. The proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.

At any time during the proposal evaluation process, the Department may require a proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

G. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

H. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the City and may be used by the City in any way deemed appropriate.

I. Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the proposer is prohibited from making contributions to:

- the officer's re-election campaign

- a candidate for that officer's office
- a committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

1. **Criminal.** Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. **Civil.** Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. **Administrative.** Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

J. Sunshine Ordinance

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

K. Public Access to Meetings and Records

If a proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the proposer must comply with Chapter 12L. The proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L

provisions regarding public access to proposer's meetings and records, and (2) a summary of all complaints concerning the proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

L. Reservations of Rights by the City

The issuance of this RFP does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFP by any other means; or
6. Determine that no project will be pursued.

M. No Waiver

No waiver by the City of any provision of this RFP shall be implied from any failure by the City to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

N. Local Business Enterprise Goals and Outreach

Due to county, federal and state funding for these services, LBE bid discounts will not be used in this RFP

VII. Contract Requirements

A. Standard Contract Provisions

The successful proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

Proposers are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits; the Minimum Compensation Ordinance; the Health Care Accountability Ordinance; the First Source Hiring Program; and applicable conflict of interest laws, as set forth in paragraphs B, C, D, E and F below.

B. Nondiscrimination in Contracts and Benefits

The successful proposer will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available on the CMD's website at www.sfCMD.org.

C. Minimum Compensation Ordinance (MCO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in S.F. Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements.

For the amount of hourly gross compensation currently required under the MCO, see www.sfgov.org/olse/mco. Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract. Additional information regarding the MCO is available on the web at www.sfgov.org/olse/mco.

D. Health Care Accountability Ordinance (HCAO)

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Health Care Accountability Ordinance (HCAO), as set forth in S.F. Administrative Code Chapter 12Q. Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the HCAO is available on the web at www.sfgov.org/olse/hcao.

E. First Source Hiring Program (FSHP)

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at <http://www.workforcedevelopmentsf.org/> and from the First Source Hiring Administrator, (415) 401-4960.

F. Conflicts of Interest

The successful proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful proposer that the City has selected the proposer.

VIII. Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Contract Award

Within ten calendar days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the tenth calendar day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure

or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

C. Delivery of Protests

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

Executive Director
Human Services Agency
P.O. Box 7988
San Francisco, CA 94120

IX. Standard Forms

Before the City can award any contract to a contractor, that contractor must file three standard City forms (items 1-3 on the chart). Because many contractors have already completed these forms, and because some informational forms are rarely revised, the City has not included them in the RFP package. Instead, this Appendix describes the forms, where to find them on the Internet (see bottom of page 2), and where to file them. If a contractor cannot get the documents off the Internet, the contractor should call (415) 554-6248 or e-mail Purchasing (purchasing@sfgov.org) and Purchasing will fax, mail or e-mail them to the contractor.

If a contractor has already filled out items 1-3 (see note under item 3) on the chart, **the contractor should not do so again unless the contractor's answers have changed.** To find out whether these forms have been submitted, the contractor should call Vendor File Support in the Controller's Office at (415) 554-6702.

If a contractor would like to apply to be certified as a local business enterprise, it must submit item 4. To find out about item 4 and certification, the contractor should call Contract Monitoring Division at (415) 252-2500.

Item	Form name and Internet location	Form	Description	Return the form to; For more info
1.	Request for Taxpayer Identification Number and Certification http://sfgsa.org/index.aspx?page=4762 www.irs.gov/pub/irs-fill/fw9.pdf	W-9	The City needs the contractor's taxpayer ID number on this form. If a contractor has already done business with the City, this form is not necessary because the City already has the number.	Controller's Office Vendor File Support City Hall, Room 484 San Francisco, CA 94102 (415) 554-6702
2.	Business Tax Declaration http://sfgsa.org/index.aspx?page=4762	P-25	All contractors must sign this form to determine if they must register with the Tax Collector, even if not located in San Francisco. All businesses that qualify as "conducting business in San Francisco" must register with the Tax Collector	Controller's Office Vendor File Support City Hall, Room 484 San Francisco, CA 94102 (415) 554-6702
3.	S.F. Administrative Code Chapters 12B & 12C Declaration: Nondiscrimination in Contracts and Benefits	CMD-12B-101	Contractors tell the City if their personnel policies meet the City's requirements for nondiscrimination against protected classes of people, and in the provision of benefits between employees with	Human Rights Comm. 25 Van Ness, #800 San Francisco, CA 94102-6059 (415) 252-2500

Item	Form name and Internet location	Form	Description	Return the form to; For more info
	http://sfgsa.org/index.aspx?page=4762 In Vendor Profile Application		spouses and employees with domestic partners. Form submission is not complete if it does not include the additional documentation asked for on the form. Other forms may be required, depending on the answers on this form. Contract-by-Contract Compliance status vendors must fill out an additional form for each contract.	
4.	CMD LBE Certification Application http://www.sfgsa.org/index.aspx?page=6058 In Vendor Profile Application		Local businesses complete this form to be certified by CMD as LBEs. Certified LBEs receive a rating bonus pursuant to Chapter 14B when bidding on City contracts if applicable. To receive the bid discount, you must be certified by CMD by the proposal due date.	Contract Monitoring Unit 30 Van Ness Avenue, Suite 200 San Francisco, CA 94102 Phone: (415) 581-2310

Where the forms are on the Internet

Office of Contract Administration

Homepage: www.sfgov.org/oca/
 Purchasing forms: Click on “Required Vendor Forms” under the “Information for Vendors and Contractors” banner.

Contract Monitoring Division

CMD’s homepage: <http://sfgsa.org/index.aspx?page=5365>
 Equal Benefits forms: <http://sfgsa.org/index.aspx?page=5359>
 LBE certification form: <http://sfgsa.org/index.aspx?page=5364#Section%20V>

X. San Francisco Human Services Agency RFP Cover Page

NAME OF ORGANIZATION(S): _____

ADDRESS: _____

DIRECTOR: _____

PHONE/FAX#: _____

EMAIL: _____

FEDERAL EMPLOYER #: _____

ANNUAL AMOUNT(s) REQUESTED: \$ _____

I understand that the San Francisco Human Services Agency (SFHSA) reserves the right to modify the specifics of this application at the time of funding and/or during the contract negotiation; that a contract may be negotiated for a portion of the amount requested; and that there is no contract until a written contract has been signed by both parties and approved by all applicable City Agencies. Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity

Signature of authorized representative(s):

Name: _____ Title: _____

Signature: _____ Date: _____

Name: _____ Title: _____

Signature: _____ Date: _____

Submit an electronic copy to **David.Kashani@sfgov.org**.

XI. San Francisco Human Services Agency Page Number Form

This form is to assist the review panel in finding the information in the Proposal that corresponds to the evaluation criteria. For each item listed below, please list the page number(s) where the reviewer may find the answer(s) to the criteria.

Evaluation and Selection Criteria		
	Minimum Qualifications	Page Number(s)
1.	A minimum of three (3) years of same or similar services to those requested in this RFP	
2.	A minimum of three (3) years serving the target population. These populations may include, but are not limited to: older adults, younger adults with disabilities, those with mental health and substance use issues and housing needs.	
3.	Demonstrated ability to provide cultural and linguistically appropriate services to the target population.	
4.	Must be willing and able to comply with the City contracting requirements set forth in Section VII of this RFP	
5.	Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within ten (10) days of notice of award.	
6.	Able to become a Business Associate of DAAS, and sign a Business Associate Agreement and adhere to all privacy laws and have HIPAA-compliant practices.	
Organizational Capacity (35 points)		
1.	Staffing Plan – Describe organizational structure and staffing patterns needed to provide the proposed services including program supervision and management. Attach job descriptions and resume of key program staff and clearly identify which staff position they occupy and provide written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City’s prior approval. (10 Points)	
2.	Service Site Plan – Describe the plan for location and hours of services and how target caseload capacity will be accommodated. (10 Points)	
3.	Description of staff training plans to ensure services are provided in an efficient manner and service and outcome objectives are being achieved. (5 points)	

4.	Description of agency experience and staff skills related to successful collaboration and management of complex data. (5 points)	
5.	Completed Disability Checklist (5 points)	
Program Approach (40 points)		
1.	Description of your agency’s specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives).(10 Points)	
2.	Description of your agency’s experience and ability to manage complex fiscal operations, specifically for the purchases of service component as well as time-studies, and local/state/federal reimbursements. (10 Points)	
3.	List and explain the specific service and outcome objectives to be accomplished through the proposal. (5 Points)	
4.	The proposal demonstrates the capacity to partner and collaborate with both the public entities and private partners demonstrated through existing partnerships, diversity of board governance, policy and practice through technology, communication, shared services and/or governance structure. (5 points)	
5.	Describe methods for data collection, documentation, and reporting service and outcome data. Describe the method(s) by which service and outcome objectives will be evaluated. (5 Points)	
6.	Describe the proposed model for clients to offer feedback and input regarding services. (5 Points)	
Fiscal Capacity (25 points)		
1.	The budget provided is clear and easy to understand. The budget reflects sound, adequate allocation of resources, matching the program components including staffing costs, operating costs and capital costs (as appropriate). The budget supports the services proposed and is competitive with other proposals. Costs are reasonable, justified, and competitive. Cost Allocation Plan is reasonable. (20 points)	
2.	Respondent’s ability to leverage other resources for this program, either from in-kind, and/or external resources. The proposal reflects the effective use of organizational resources/external resources, including leveraged funds, designated exclusively for this program. (5 points)	

XII. San Francisco Human Services Agency Budget Forms and Instructions

Budgets should be submitted in the standard HSA format. Forms are available at: <http://mission.sfgov.org/OCABidPublication/ReviewBids.aspx> and click on the “Consultants and Professional Services” link and then the link for this RFP.

The following spreadsheets are in Excel. There are 4 pages in the budget (in addition to the budget justification), as follows: Contract Budget Summary, Salaries and Benefits Detail, Operating Expense Detail, Capital Expenditure Detail.

Please note the Salaries and Benefits, Operating Expense and Capital Expenditure are direct costs and must be clearly and easily attributable to a specific program.

The Budget Justification is a narrative, which provides the detailed information and calculations supporting the amount allocated for each budget line item. There is no form provided for the Budget Justification. Please detail all mathematical computations for each line item. Show how the total dollar amount was derived, e.g., the annual salary for each position multiplied by the FTE, the number of square feet of office space to be utilized multiplied by the rate per square foot, the cost per month for insurance multiplied by the number of months in the contract term, etc. For the Salaries and Benefits section, list the position, a brief sentence of the position's responsibilities, the full-time equivalent (FTE), the percentage of FTE allocated to the activity, the salary per month, the salary per annum, and the mathematical computation used to arrive at the total dollar amount.

The Cost Allocation Plan is required. Respondents must follow the City's cost allocation guidelines for nonprofit contractors, which largely follow those described by Generally Accepted Accounting Principles (GAAP) and in Federal OMB Circular A-122. The plan should include how indirect costs were calculated.

If applicable, attach a separate detailed Subcontracting budget using the standard HSA format if there is a Subcontractor arrangement made under the terms of the contract. Provide a brief explanation of the subcontracting arrangement, as well as a budget breakdown. Please note, the total subcontractor budget amount should appear on the Operating Expense Detail sheet under the Subcontractor section.

Indirect rates are not allowable on subcontractor indirect expenditures, capital expenditures, aid payments, other direct voucher payments, or any stipend, subsidy or expense paid on behalf of a client (i.e., security deposit, rental payment assistance, transportation vouchers, etc.). These examples are not intended to be a comprehensive list. If an organization is uncertain whether indirect costs can be applied to a particular expense, it should consult with the HSA Contract Manager.

These guidelines provide general information. If further clarification or technical assistance is required, consult your HSA Office of Contract Management Contract Manager.