

REQUESTS FOR PROPOSAL POLICY

I. **Guidelines:**

San Andreas Regional Center (San Andreas) opens a Request For Proposal (RFP) cycle in response to one of the following two scenarios:

- Start-up funding is available for an identified, needed service, and / or
- The vendorization process has revealed that the service being vendored will result in a rate that exceeds \$100,000 annually.

Current and potential service providers are encouraged to utilize the RFP process to submit applications for services and supports that reflect the description of current needs for people served by San Andreas Regional Center.

Equity and Diversity Section Included in the RFP

An RFP prepared by San Andreas to develop or provide client services and supports shall include a section on issues of equity and diversity. The section on equity and diversity shall request, but not be limited to, all of the following information:

- A statement outlining the applicant's plan to serve diverse populations, including, but not limited to, culturally and linguistically diverse populations;
- Examples of the applicant's commitment to addressing the needs of those diverse populations; and
- Any additional information that the applicant deems relevant to issues of equity and diversity.

A RFP that applies only to specifically identified clients shall include a request for information on how the applicant plans to provide culturally and linguistically competent services and supports to those specific clients.

The above two paragraphs encompass the requirements set forth in the Welfare and Institutions Code (WIC) Section 4648.11.

- A. Development of RFP
RFP is developed by the Resource District Manager and San Andreas Directors or District Managers.
- B. Announcement of RFP
Interested service providers receive notification of RFP's by:
 - 1. Announcements received through the mail or
 - 2. Announcement on the Resource Services page of the San Andreas web site.
- C. Review of RFP
Proposals received by the Resource District Manger are initially screened by RFP Review Committee and judged by the criteria set forth in the RFP. Resource District Manager notifies RFP applicants that based upon the RFP's criteria:
 - 1. Service provider has been selected to be interviewed by the RFP Review Committee regarding service provider's proposal or
 - 2. Service provider's proposal will not move on to the interview phase.

If selected the service providers are interviewed by RFP Review Committee.

- D. Awarding of Contract to Selected Provider.
Resource District Manager notifies service providers interviewed by the RFP Review Committee that based upon the RFP's criteria:
 - 1. Service provider has been selected to be awarded the contract to develop the service outlined in the RFP or
 - 2. Service provider's proposal will not move on to the interview phase.

If selected the service provider signs contract and begins development of service.

II. **Procedure:**

Development of RFP.

San Andreas Resource District Manager will conduct the following activities:

1. Either alone, or in collaboration with San Andreas Directors or other San Andreas District Managers, develop the following sections of the RFP:
 - a. Service Description (Appendix A)
 - i. Problem/opportunity
 - ii. Goals / objectives
 - iii. Any additional information
 - b. Required Proposal Documents
 - i. Appendix A – Service Description
 - ii. Appendix B – Proposal Title Page with instructions to service provider regarding formatting of proposal.
 - iii. Appendix C – Financial Statement
 - iv. Appendix D – Resumes, Statements of Qualifications and References including Statement of Obligations
 - v. Appendix E – Estimated Cost Worksheet
 - vi. Appendix F – Program Design Checklist, if applicable
 - vii. Program Description, if applicable,
 - viii. Timeline Schedule
 - c. Estimated Service Duration
 - d. Assumptions and Agreements
 - e. Submission Information
 - f. Contact Persons for Additional Information or Clarification
 - g. Basis for Award of Contract (Criteria)
 - h. Anticipated Selection Schedule
 - i. RFP Orientation Session date, location, etc.
 - ii. Initial review period timeframe and announcement of those proposals moving to interview phase.

- iii. RFP Review Committee interviews dates, locations, etc.
 - iv. Notification of selected service provider
 - v. Date service(s) will begin
 - vi. Reserve rooms for above activities i-v.
2. Identify RFP Review Committee members and inform them of their timelines and obligations as members of the RFP Review Committee.
- a. San Andreas Director or Manager interested in developing an RFP will conduct the following activities:
 - 1. Request of copy of the RFP template from the Resource District Manager.
 - 2. In collaboration with the Resource District Manager, develop the following sections of the RFP:
 - a. Appendix A - Service Description
 - i. Problem/opportunity
 - ii. Goals / objectives
 - iii. Any additional information
 - b. Proposal Requirements
 - i. Appendix A – Service Description
 - ii. Appendix B – Proposal Title Page with instructions to service provider regarding formatting of proposal.
 - iii. Appendix C – Financial Statement
 - iv. Appendix D – Resumes, Statements of Qualifications and References including Statement of Obligations
 - v. Appendix E – Estimated Cost Worksheet
 - vi. Appendix F – Program Design Checklist, if applicable
 - vii. Program Description
 - viii. Timeline Schedule
 - c. Estimated Service Duration

- d. Assumptions and Agreements
- e. Submission Information
- f. Contact Persons for Additional Information or Clarification
- g. Basis for Award of Contract (Criteria)
- h. Anticipated Selection Schedule
 - i. RFP Orientation Session date, location, etc.
 - ii. Initial review period timeframe and announcement of those proposals moving to interview phase.
 - iii. RFP Review Committee interviews dates, locations, etc.
 - iv. Notification of selected service provider
 - v. Date service(s) will begin

Identify RFP Review Committee members.

A. Announcement of RFP

San Andreas Resource District Manager will conduct the following activities:

1. Submit RFP announcement and attachment appendixes A-F to the Information Systems Director or designee.
2. Inform Information Systems Director or designee of date RFP should be published to San Andreas' web site as well as date at which the RFP should be removed from San Andreas' web site.
3. Request that Resource Unit Secretary print mailing labels from the electronic address book of service providers wanting to be notified of RFP's.
4. Ensure that service providers on the above list receive the RFP announcement by the same date that the announcement is published to the San Andreas web site.

San Andreas Information Systems Director or designee will conduct the following activities:

1. Publish the RFP announcement and appendixes to the San Andreas web site on the date specified by the Resource District Manager.
2. Ensure the ongoing functionality of the electronic address book of service providers wanting to be notified of RFP's.

B. Review of RFP

San Andreas Resource District Manager will conduct the following activities:

1. In accordance with criteria stated in RFP, produce RFP Review Committee initial review evaluation forms as well as interview evaluation forms.
2. Supply RFP Review Committee members with copies of submitted proposals for their initial review.
3. Conduct the initial review meeting (if applicable) of the RFP Review Committee and provide scoring results from initial review to RFP Review Committee.
4. Notify service providers in writing of results of initial review, i.e. which service providers will move onto the interview phase (if applicable).
5. Conduct the interview meetings (if applicable) of the RFP Review Committee and provide scoring results from interviews to RFP Review Committee.

San Andreas RFP Review Committee will conduct the following activities:

1. Review proposals received from Resource District Manager.
2. Attend initial review meeting (if applicable) of the RFP Review Committee.
3. Submit initial review evaluation forms to the Resource District Manager.
4. Attend service provider interviews (if applicable)

5. Submit interview evaluation forms to the Resource District Manager.

C. Awarding of Contract to Selected Provider.

San Andreas Resource District Manager will conduct the following activities:

1. Notify service providers in writing of results of interviews, i.e. which service provider(s) is awarded contract.
2. Write contract(s) (if applicable) and execute contract(s) to encumber monies.
3. Write POS requests (if applicable).
4. Request check(s) for initial grant as well as for subsequent reimbursements (if applicable).

Adopted 12/21/2015