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*Director*

State of California—Health and Human Services Agency  
California Department of Public Health



ARNOLD SCHWARZENEGGER  
*Governor*

### Notice to Prospective Proposers

Prospective Proposers are invited to review and respond to the attached Request for Proposal (RFP) Number 08-85191 entitled, “Domestic Violence Primary Prevention Technical Assistance and Training Project (DVPPTAT)”. When preparing and submitting a proposal, compliance with the instructions found herein is imperative.

All agreements entered into with the State of California will include, by reference, General Terms and Conditions (GTC) and Contractor Certification Clauses (CCC) that may be viewed and downloaded at this Internet site: <http://www.ols.dgs.ca.gov/Standard+Language/default.htm>. If any prospective Proposer lacks Internet access, a hard copy can be obtained by contacting the person signing this letter.

If a discrepancy occurs between the information in the advertisement appearing in the California State Contracts Register and the information herein, the information in this notice and in the attached RFP shall take precedence.

#### I. Proposal Submission Deadline

Regardless of postmark or method of delivery, the California Department of Public Health Services' Contract Management Unit must receive proposal packages no later than **4:00 p.m.** on **May 7, 2008**. Refer to the attached RFP for detailed submission requirements.

#### II. Mandatory Non-Binding Letter of Intent

In this procurement, prospective Proposers are required to submit a non-binding Letter of Intent. See the RFP for detailed Letter of Intent submission instructions.

#### III. Disabled Veteran Business Enterprise (DVBE) participation requirements

California Law requires Disabled Veteran Business Enterprise (DVBE) participation and/or performance of a good faith effort (GFE) to meet these requirements. CDPH policies require DVBE participation on all contracts exceeding \$10,000. Prospective Proposers may need four weeks or more to complete this process; therefore it is advisable to begin this process promptly. Out-of-state firms must comply with California's DVBE participation requirements.

#### IV. Funding Limit

Funding for these services may be limited to the following amounts:

- A. \$380,000 for the budget period of 8/01/08 through 6/30/09.
- B. \$300,000 for the budget period of 7/01/09 through 6/30/10.

- C. \$300,000 for the budget period of 7/01/10 through 6/30/11.
- D. \$980,000 for the entire contract term.

Funding for each state fiscal year is subject to an annual appropriation by the State Legislature or Congress. If full funding does not become available, CDPH will either cancel the resulting agreement or amend it to reflect reduced funding and reduced activities. Continuation of services beyond the first state fiscal year is also subject to the contractor's successful performance. Without prior CDPH authorization, contractors may not expend funds set aside for one budget period in a subsequent budget period.

**V. Proposer Questions**

In the opinion of CDPH, this Request for Proposal is complete and without need of explanation. However, if questions arise or there is a need to obtain clarifying information, put all inquiries in writing and mail or fax them to CDPH according to the instructions in the RFP section entitled, "Proposer Questions".

Thank you for your interest in our Department's service needs.

Sincerely,

Jacquolyn Duerr, M.P.H., Acting Chief  
Epidemiology and Prevention for Injury Control Branch

Attachment



**Request for Proposal 08-85191**

**Domestic Violence Primary Prevention Technical Assistance and Training  
Project (DVPPTAT)**

California Department of Public Health  
EPIC Branch  
MS Code 7214  
1616 Capitol Avenue, Suite 74.660  
P. O. Box 997377  
Sacramento, CA 95899-7377

**[Do not submit proposals to the above address.]**

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Attachment 3	Business Information Sheet

<b>Attachment #</b>	<b>Attachment Name</b>
Attachment 4	Client References
Attachment 5	RFP Clause Certification
Attachment 6	CCC 307 – Certification
Attachment 7	Payee Data Record
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Attachment 22	Mandatory Non-Binding Letter of Intent
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S. Sample Contract Forms / Exhibits

<b>Exhibit #</b>	<b>Exhibit Name</b>
Exhibit A1	Standard Agreement

<b>Exhibit #</b>	<b>Exhibit Name</b>
Exhibit A	Scope of Work
Exhibit B	Budget Detail and Payment Provisions
Exhibit C – View on-line.	General Terms and Conditions (GTC 307). View or download at this Internet site <a href="http://www.ols.dgs.ca.gov/Standard+Language/default.htm">http://www.ols.dgs.ca.gov/Standard+Language/default.htm</a> .
Exhibit D(C)	Special Terms and Conditions
Exhibit E	Additional Provisions
Exhibit F	Contractor's Release
Exhibit G	Travel Reimbursement Information

## A. Purpose, Background and Description of Services

### 1. Purpose

The California Department of Public Health (CDPH), Epidemiology and Prevention for Injury Control Branch (EPIC), is soliciting proposals from firms that are able to develop, implement, and evaluate the *Domestic Violence Primary Prevention Technical Assistance and Training Project (DVPPTATP)*, focused on building the capacity of local organizations to provide comprehensive domestic violence (DV) primary prevention programs in communities across the state. Project activities include: convening a Project Advisory Team (PAT); compiling and tailoring DV prevention curricula and materials; developing and implementing an evaluation plan; providing extensive technical assistance and training (TAT) to CDPH/EPIC grantees on developing, implementing, and evaluating model primary prevention programs; providing regional training workshops statewide; and coordinating a statewide networking meeting. Proposals must address all of the services described in Exhibit A entitled, "Scope of Work".

CDPH/EPIC intends to make a single contract award to the most responsive and responsible firm earning the highest score. This procurement is open to all eligible firms and/or individuals that meet the qualification requirements, including commercial businesses, nonprofit organizations, State or public universities (including auxiliary organizations) and other entities.

For the purposes of this RFP, the following definitions apply:

Domestic Violence: Domestic violence is a spectrum and often a pattern of behaviors that includes physical, sexual, verbal, emotional, and psychological abuse and/or economic control used by adults or adolescents against their current or former intimate partners in an attempt to exercise power and authority, which has a destructive, harmful effect on individuals, the family and the community.

Domestic Violence Prevention: Population-based and/or environmental and system-level strategies, policies, and actions that prevent domestic violence from initially occurring. Such prevention efforts work to modify and/or entirely eliminate the events, conditions, situations, or exposure to influences (*risk factors*) that result in the initiation of domestic violence and associated injuries, disabilities, and deaths. Additionally, domestic violence prevention efforts address perpetration, victimization, and bystander attitudes and behaviors, and seek to identify and enhance *protective factors* that impede the initiation of domestic violence in at risk populations and in the community.

Categories of Prevention:

These categories assist in identifying the types of interventions to prevent domestic violence, including before it ever occurs (primary prevention) and those that take place after violence has already occurred (secondary and tertiary prevention). The focus of this RFP is on primary prevention.

- Primary Prevention: Approaches that take place before domestic violence has occurred to prevent initial perpetration or victimization.
- Secondary Prevention: Immediate responses after domestic violence has occurred to deal with the short-term consequences of violence, and to prevent the re-occurrence of violence or abuse.
- Tertiary Prevention: Long-term responses after domestic violence has occurred to deal with the lasting consequences of violence and batterer's treatment interventions.

Evidence-based and promising programs: Programs that have been rigorously evaluated and have been shown to have significant and positive evidence of efficacy in multiple settings can be defined as “evidence-based.” These programs are considered to be scientifically rigorous and to provide the strongest evidence of efficacy.

An innovative program that has field–based data showing positive outcomes for preventing domestic violence, but that may not yet have been studied under controlled research conditions can be defined as a “promising program” or a program that has “promising practices.”

Due to the limited number of evidence-based programs available for domestic violence, the DVPPTATP will review programs and practices that fit into both of these categories, and/or that meet the guidelines included in the “Nine Principles of Effective Prevention Programs” (**Attachment 23**).

## 2. Background

### The EPIC Branch

Since 1988, EPIC has served as the lead injury prevention program within CDPH, conducting statewide planning, research, surveillance, prevention, and control activities at the state level, and supporting local jurisdictions to conduct prevention programs in unintentional (accidental) and intentional (violent) injury control. EPIC works in coordination with other CDPH programs such as the Battered Women Shelter Program of the Maternal, Child, and Adolescent Health (MCAH) Branch, and the Office of Women’s Health, as well as with state agencies, and state and local organizations and programs.

EPIC’s Violence Prevention Unit (VPU) was established as part of the California 1994 Women’s Health Initiative. The mission of the VPU is to “provide leadership in the application of public health principles and practices to prevent violent (intentional) injuries”. The goal of the VPU is “to conduct epidemiological investigations and develop, implement, and evaluate violence prevention projects and policies.” The VPU seeks to address domestic violence through shifting cultural norms, policies, and practices to create a climate free from violence. Rather than focusing on individuals and victims, the VPU’s strength and imperative is in community and population-based prevention focusing on preventing violence before it is initiated, as opposed to an approach which concentrates on service provision after victimization has occurred. This primary prevention public health approach is a systematic process that promotes healthy behaviors and environments, and reduces the likelihood or frequency of domestic violence. Primary prevention is distinguished from secondary prevention because it explicitly focuses on action before there is a threat of violence.

VPU staff has a wealth of expertise in violence against women issues, and are responsible for the federally funded Rape Prevention Education Program, the Violence Against Women Statewide Prevention Project, and the administration of the Domestic Violence Training and Education Fund (batterer’s fines), which funds EPIC’s *Domestic Violence Training and Education Program*.

EPIC conceptualizes and implements the *Domestic Violence Training and Education Program* in response to strategic planning with the CDPH Statewide Domestic Violence Advisory Council, state agencies, statewide organizations, and constituencies partnering on violence prevention issues. VPU has implemented this program over the last decade, training a broad array of professionals who are instrumental in preventing domestic violence, including:

- Domestic Violence and The Court: Judges and Other Staff Training Project
- Probation Department Domestic Violence Training Project
- Domestic Violence Restraining Order Translation Project
- Domestic Violence and The Home Visitor Training Project
- Faith Leaders and Domestic Violence Training Project
- Faith in Violence Free Families: Domestic Violence Advocates and Faith Community Leaders Training Project
- Freedom From Violence: Preventing Violence Against Women with Disabilities Training Project

### **The Violence Against Women Statewide Prevention Project**

In 2003, VPU was awarded a one-year planning grant from the Centers for Disease Control and Prevention to establish and coordinate the *Violence Against Women Statewide Prevention Project (VAWSPP)*. VPU staff convened a multidisciplinary group of stakeholders to participate as partners in this project to identify changes in policy and institutional practice that would prevent all forms of violence against women. A report was published in April 2004 outlining priority policy recommendations for the prevention of violence against women entitled “*California Statewide Policy Recommendations for the Prevention of Violence Against Women*” (<http://www.cdph.ca.gov/HealthInfo/injviosaf/Documents/VAWSPP-EPIC.pdf> ).

Since that time, EPIC has continued the VAWSPP, working in partnership with key agencies and the major statewide coalitions and organizations necessary to the successful implementation of a comprehensive violence against women prevention effort. The VAWSPP has been integrated into the VPU, and recommendations from the statewide policy document guide the work of the VPU, and in providing direction for this RFP.

The Domestic Violence Primary Prevention Technical Assistance and Training Project (DVPPTATP) was designed to support the following priorities established by the VAWSPP:

- Support a long-term statewide campaign to change social norms so that violence against women is no longer tolerated in our society.
- Create uniform messages that articulate violence against women as a violation of human rights, a serious public health problem, and a threat to public safety.
- Establish new and/or sustainable sources of state-level funding for violence against women primary prevention programs.

### **Domestic Violence Primary Prevention Program (DVPPP)**

The intent of the overall *Domestic Violence Primary Prevention Program (DVPPP)* is to strengthen the capacity of local organizations to provide comprehensive primary prevention programs in communities across the state. The DVPPP includes two components: 1) the *DVPP Technical Assistance and Training Project (DVPPTATP)* and 2) the *DVPP Pilot Projects*. These two components will build upon and enhance existing primary prevention efforts in California, and contribute to building a stronger evidence base for future work by deepening understanding of strategies that can prevent first-time perpetration of relationship violence and abuse.

The DVPPTATP activities as outlined in this RFP include providing extensive technical assistance and training on developing, implementing, and evaluating model DVPP programs; and the development of tailored DVPP collateral materials for California.

CDPH/EPIC will fund approximately 8-10 DVPPP Pilot Projects in July 2009 in the form of small grants to administer and evaluate model programs that include the selected evidence-based or promising models for DVPP.

**B. Time Schedule**

Below is the tentative time schedule for this procurement.

<b>Event</b>	<b>Date</b>	<b>Time (If applicable)</b>
RFP Released	03/19/08	
Questions Due	04/02/08	4:00 p.m.
Voluntary Pre-Proposal Teleconference	04/09/08	10:00 a.m.
Mandatory Non-Binding Letter of Intent	04/14/08	4:00 p.m.
Proposal Due Date	05/07/08	4:00 p.m.
Notice of Intent to Award Posted	05/21/08	
Protest Deadline	05/28/08	5:00 p.m.
Contract Award Date	05/29/08	
Proposed Start Date of Agreement	08/01/08	

**C. Contract Term**

The term of the resulting agreement is expected to be 35 months and is anticipated to be effective from August 1, 2008 through June 30, 2011. The agreement term may change if CDPH makes an award earlier than expected or if CDPH cannot execute the agreement in a timely manner due to unforeseen delays. CDPH reserves the right to extend the term of the resulting agreement via an amendment as necessary to complete or continue the services. Contract extensions are subject to satisfactory performance, funding availability, and possibly approval by the Department of General Services.

The resulting contract will be of no force or effect until it is signed by both parties and approved by the Department of General Services, if required. The Contractor is hereby advised not to commence performance until all approvals have been obtained. Should performance commence before all approvals are obtained, said services may be considered to have been volunteered if all approvals have not been obtained.

## **D. Proposer Questions**

Immediately notify CDPH if clarification is needed regarding the services sought or questions arise about the RFP and/or its accompanying materials, instructions, or requirements. Put the inquiry in writing and transmit it to CDPH as instructed below. At its discretion, CDPH reserves the right to contact an inquirer to seek clarification of any inquiry received.

Proposers that fail to report a known or suspected problem with the RFP and/or its accompanying materials or fail to seek clarification and/or correction of the RFP and/or its accompanying materials shall submit a proposal at their own risk. In addition, if awarded the contract, the successful Proposer shall not be entitled to additional compensation for any additional work caused by such problem, including any ambiguity, conflict, discrepancy, omission, or error.

If an inquiry appears to be unique to a single firm or is marked "Confidential", CDPH will mail, email, or fax a response only to the inquirer if CDPH concurs with the Proposer's claim that the inquiry is sensitive or proprietary in nature. If CDPH does not concur, the inquiry will be answered in the manner described herein and the Proposer will be so notified. Inquiries and/or responses that CDPH agrees should be held in confidence shall be held in confidence only until the Notice of Intent to Award is posted.

To the extent practical, inquiries shall remain as submitted. However, CDPH may consolidate and/or paraphrase similar or related inquiries.

### **1. What to include in an inquiry**

- a. Inquirer's name, name of firm submitting the inquiry, mailing address, email address, area code and telephone number, and fax number.
- b. A description of the subject or issue in question or discrepancy found.
- c. RFP section, page number or other information useful in identifying the specific problem or issue in question.
- d. Remedy sought, if any.

A prospective Proposer that desires clarification about specific RFP requirements and/or whose inquiry relates to sensitive issues or proprietary aspects of a proposal may submit individual inquiries that are marked "Confidential". The Inquirer must include with its inquiry an explanation as to why it believes questions marked "Confidential" are sensitive or surround a proprietary issue.

### **2. Question deadline**

Proposers are encouraged to submit written inquiries about this RFP to CDPH no later than two (2) working days before the Pre-Proposal Conference date so answers can be prepared in advance. Notwithstanding the initial question submission deadline, CDPH will accept written or faxed inquiries received by the date and time stated for the Pre-Proposal Conference/teleconference in the section entitled, "Time Schedule." At its discretion, CDPH may contact an inquirer to seek clarification of any inquiry received.

Notwithstanding the initial question submission deadline, CDPH will accept questions or inquiries about the following issues if such inquiries are received prior to the proposal submission deadline.

- a. DVBE participation requirements and how to complete the DVBE attachments,
- b. The reporting of RFP errors or irregularities.

**3. How to submit questions**

Submit inquiries using one of the following methods.

Submit written inquiries to Nancy Bagnato by email to [nancy.bagnato@cdph.ca.gov](mailto:nancy.bagnato@cdph.ca.gov), or by fax to (916) 552-9810.

<p><b>U.S. Mail, Hand Delivery or Overnight Express:</b></p>	<p><b>Fax:</b></p>
<p><b>Questions RFP 08-85191</b>                  California Department of Public Health                  EPIC Branch, Violence Prevention Unit                  Nancy Bagnato                  MS 7214                  1616 Capitol Avenue, Suite 74.660                  P. O. Box 997377                  Sacramento, CA 95899-7377</p>	<p><b>Questions RFP 08-85191</b>                  California Department of Public Health                  EPIC Branch, Violence Prevention Unit                  Nancy Bagnato   <b>Fax:</b> (916) 552-9810</p>

Proposers submitting inquiries by fax are responsible for confirming the receipt of all faxed materials by the question deadline.

Call the EPIC Branch office at (916) 552-9800 to confirm faxed transmissions.

**4. Proposer warning**

- a. CDPH’s internal processing of U.S. mail may add 48 hours or more to the delivery time. If questions are mailed, consider using certified or registered mail and request a receipt upon delivery.
- b. For hand deliveries, allow sufficient time to locate on street metered parking and to sign-in at the security desk. If detained at the security desk, ask security personnel to call Nancy Bagnato at (916) 552-9846 to arrange for question pickup and receipt issuance by program staff.
- c. Courier service personnel must sign-in at the security station and must obtain an access key card. Couriers will then be able to access pre-determined areas. If detained at the security desk, ask security personnel to call Nancy Bagnato at (916) 552-9846 to collect the question envelope and to issue a receipt.

**5. Verbal questions**

Verbal inquiries are discouraged. CDPH reserves the right not to accept or respond to verbal inquiries. **Spontaneous verbal remarks provided in response to verbal inquiries are unofficial and are not binding on CDPH unless later confirmed in writing.**

Direct all verbal requests for DVBE assistance to CDPH’s DVBE Advocate at (916) 650-0228 up to the proposal deadline.

**E. Pre-Proposal Teleconference**

CDPH will conduct a voluntary Pre-Proposal Teleconference on the date and time stated in the section entitled, “Time Schedule.” To participate in the teleconference, use a touch-tone telephone to dial (916) 552-1508, and then enter the following access code 599051.

Prospective proposers that intend to submit a proposal are encouraged to participate in the voluntary Pre-Proposal Teleconference. It shall be each prospective proposer's responsibility to join the teleconference promptly at the time stated in the section entitled, "Time Schedule." CDPH reserves the right not to repeat information for participants that join the teleconference after it has begun.

If a potential prime contractor is unable to attend the voluntary Pre-Proposal Teleconference, an authorized representative of its choice may attend on its behalf. The representative may only sign-in for one potential prime contractor. Subcontractors may represent a potential prime contractor at the voluntary Pre-Proposal Teleconference.

The voluntary Pre-Proposal Teleconference is a public event or meeting and anyone can join.

The purpose of the teleconference is to:

1. Allow prospective Proposers to ask questions about the services sought or RFP requirements and/or instructions.
2. Share the answers to general questions and inquiries received before and during the teleconference.

**Spontaneous verbal remarks provided in response to questions/inquiries are unofficial and are not binding on CDPH unless later confirmed in writing.**

Carefully review this RFP before the teleconference date to become familiar with the qualification requirements, scope of work and proposal content requirements. Teleconference attendees are encouraged to have their copy of this RFP available for viewing during the teleconference.

Refer to the RFP section entitled, "Proposer Questions" for instructions on how to submit written questions and inquiries before the teleconference date.

If CDPH is unable to respond to all inquiries received before and/or during the teleconference, CDPH will provide written answers shortly thereafter. CDPH reserves the right to determine which inquiries will be answered during the teleconference and which will be answered later in writing.

After the teleconference, CDPH will summarize all general questions and issues raised before and during the teleconference and mail, email, or fax the summary and responses to all persons who received this RFP and to those who attended/participated in the teleconference. If an inquiry appears to be unique to a single firm or is marked "Confidential", CDPH will mail, email, or fax a response only to the inquirer if CDPH concurs with the inquirer's claim that the inquiry is sensitive or proprietary in nature. If CDPH does not concur, the inquiry will be answered in the manner described herein and the inquirer will be so notified. Inquiries and/or responses that CDPH agrees should be held in confidence shall be held in confidence only until the Notice of Intent to Award is posted.

To the extent practical, inquiries shall remain as submitted. However, CDPH may consolidate and/or paraphrase similar or related inquiries.

Teleconference attendees are responsible for their costs to attend/participate in the teleconference. Those costs cannot be charged to CDPH or included in any cost element of a Proposer's price offering.

**F. Reasonable Accommodations**

For individuals with disabilities, the Department will provide assistive services such as sign-language interpretation, real-time captioning, note takers, reading or writing assistance, and conversion of Pre-Proposal Conference handouts, Request for Proposal, questions/answers, RFP Addenda, or other Administrative Notices into Braille, large print, audiocassette, or computer disk. To request such services or copies in an alternate format, please call the number below to arrange for reasonable accommodations.

EPIC Branch  
 Program telephone number (916) 552-9800  
 (TTY) California Relay telephone number 711-1-800-735-2929

NOTE: The range of assistive services available may be limited if requests are received less than ten State working days prior to the conference date or requestors cannot allow ten or more State working days prior to date the alternate format material is needed.

**G. Mandatory Non-Binding Letter of Intent**

**1. General information**

Prospective Proposers that intend to submit a proposal are **required** to indicate their intention to submit a proposal. Failure to submit the mandatory Non-Binding Letter of Intent will result in proposal rejection. The mandatory Letter of Intent is not binding and prospective Proposers are not required to submit a proposal merely because a Letter of Intent is submitted. **Use the Mandatory Non-Binding Letter of Intent (Attachment 22) for this purpose.**

**2. Submitting the Letter of Intent**

Regardless of delivery method, the mandatory Non-Binding Letter of Intent must be received by the date and time stated in the section entitled, "Time Schedule."

Submit the Letter of Intent using one of the following methods.

<p><b>U.S. Mail, Hand Delivery or Overnight Express:</b></p>	<p><b>Fax:</b></p>
<p><b>Letter of Intent RFP 08-85191</b>                  California Department of Public Health                  EPIC Branch, Violence Prevention Unit                  Nancy Bagnato                  MS 7214                  1616 Capitol Avenue, Suite 74.660                  P. O. Box 997377                  Sacramento, CA 95899-7377</p>	<p><b>Letter of Intent RFP 08-85191</b>                  California Department of Public Health                  EPIC Branch, Violence Prevention Unit                  Nancy Bagnato   <b>Fax:</b> (916) 552-9810</p>

Proposers transmitting a Letter of Intent by fax are responsible for confirming the receipt of the faxed Letter of Intent by the stated deadline.

Call the EPIC Branch office at (916) 552-9800 to confirm faxed transmissions.

### **3. Proposer warning**

- a. CDPH's internal processing of U.S. mail may add 48 hours or more to the delivery time. If the Letter of Intent is mailed, consider using certified or registered mail and request a receipt upon delivery.
- b. For hand deliveries, allow sufficient time to locate on street metered parking and to sign-in at the security desk. If detained at the security desk, ask security personnel to call the EPIC Branch at (916) 552-9800 to arrange for Letter of Intent pickup and receipt issuance.
- c. Courier service personnel must sign-in at the security station and must obtain an access key card. Couriers will then be able to access pre-determined areas. If detained at the security desk, ask security personnel to call the EPIC Branch at (916) 552-9800 to have appropriate staff collect the Letter of Intent request and to issue a receipt.

### **H. Scope of Work**

See Exhibit A entitled, "Scope of Work" that is included in the Sample Contract Forms and Exhibits section of this RFP. Exhibit A contains a detailed description of the services and work to be performed as a result of this procurement.

### **I. Qualification Requirements**

Failure to meet the following requirements by the proposal submission deadline will be grounds for CDPH to deem a Proposer nonresponsive. Evaluators may choose not to thoroughly review or score proposals that fail to meet these requirements. In submitting a proposal, each Proposer must certify and prove that it possesses the following qualification requirements.

1. Proposers must demonstrate an ongoing organizational commitment to the prevention of domestic violence.
2. Proposers must have at least two consecutive years of experience of the types listed below. All experience must have occurred within the past five years. It is possible to attain the experience types listed below during the same time period. Proposers must have experience in:
  - Provision of statewide training and technical assistance on domestic violence prevention to diverse audiences in California;
  - Developing, implementing, and evaluating training curricula and collateral materials;
  - Designing, developing, and producing camera-ready media and educational materials; and
  - Designing, planning, and coordinating statewide meetings and conferences.
3. Proposers must certify they have read and are willing to comply with all proposed terms and conditions addressed in the RFP section entitled, "Contract Terms and Conditions", including the terms appearing in the referenced contract exhibits.
4. Corporations must certify they are in good standing and qualified to conduct business in California.
5. Non-profit organizations must certify their eligibility to claim nonprofit status.
6. Proposers must have a past record of sound business integrity and a history of being responsive to past contractual obligations.

7. Proposers must certify they are financially stable and solvent and have adequate cash reserves to meet all financial obligations while awaiting reimbursement from the State.
8. Proposers must certify their proposal response is not in violation of Public Contract Code (PCC) Section 10365.5 and, if applicable, must identify previous consultant services contracts that are related in any manner to the services, goods, or supplies being acquired in this solicitation. Detailed requirements are outlined in **Attachment 8**.

PCC Section 10365.5 generally prohibits a person, firm, or subsidiary thereof that has been awarded a consulting services contract from submitting a bid for and/or being awarded an agreement for, the provision of services, procurement of goods or supplies, or any other related action that is required, suggested, or otherwise deemed appropriate in the end product of a consulting services contract.

PCC Section 10365.5 does not apply to any person, firm, or subsidiary thereof that is awarded a subcontract of a consulting services agreement that totals no more than 10 percent of the total monetary value of the consulting services agreement. Consultants and employees of a firm that provides consulting advice under an original consulting contract are not prohibited from providing services as employees of another firm on a follow-on contract, unless the persons are named contracting parties or named parties in a subcontract of the original contract.

PCC Section 10365.5 does not distinguish between intentional, negligent, and/or inadvertent violations. A violation could result in disqualification from bidding, a void contract, and/or imposition of criminal penalties.

9. Proposers must either achieve actual Disabled Veteran Business Enterprise (DVBE) participation **or** make an adequate Good Faith Effort (GFE) to meet the DVBE participation requirements. Detailed requirements are outlined in **Attachment 9** (DVBE Instructions/Forms). This requirement applies if the total cost or price offered equals \$10,000 or more.
10. The winning Proposer must supply, before contract execution, proof of liability insurance that meets the requirements of Provision 16 of Exhibit D(C) entitled, Special Terms and Conditions.

## **J. Proposal Format and Content Requirements**

### **1. General instructions**

- a. Each firm or individual may submit only one proposal.

For the purposes of this paragraph, "firm" includes a parent corporation of a firm and any other subsidiary of that parent corporation. If a firm or individual submits more than one proposal, CDPH will reject all proposals submitted by that firm or individual.

A firm or individual proposing to act as a prime contractor may be named as a subcontractor in another Proposer's proposal. Similarly, more than one Proposer may use the same subcontractors and/or independent consultants.

- b. Develop proposals by following all RFP instructions and/or clarifications issued by CDPH in the form of question and answer notices, clarification notices, Administrative Bulletins or RFP addenda.

- c. Before submitting a proposal, seek timely written clarification of any requirements or instructions that are believed to be vague, unclear or that are not fully understood.
- d. In preparing a proposal response, all narrative portions should be straightforward, detailed, and precise. CDPH will determine the responsiveness of a proposal by its quality, not its volume, packaging or colored displays.
- e. Arrange for the timely delivery of the proposal package(s) to the address specified in this RFP. Do not delay until shortly before the deadline to submit the proposal.

## 2. Format requirements

- a. Submit one (1) original proposal and five (5) copies or sets.
  - 1) Write “**Original**” on the original proposal set after you have duplicated the copies.
  - 2) Each proposal set must be complete with a copy of all required attachments and documentation.
- b. Format the narrative portions of the proposal as follows:
  - 1) Use one-inch margins at the top, bottom, and both sides.
  - 2) Use a font size of not less than 12 points.
  - 3) Print pages single-sided on white bond paper.
  - 4) Sequentially paginate the pages in each section. It is not necessary to paginate items in the Forms Section or Appendix Section.
- c. Bind each proposal set in a way that enables easy page removal. Loose leaf or three-ring binders are acceptable.
- d. All RFP attachments that require a signature must be signed in ink, preferably in a color other than black.
  - 1) Have a person who is authorized to bind the proposing firm sign each RFP attachment that requires a signature. Signature stamps are not acceptable.
  - 2) Place the originally signed attachments in the proposal set marked “Original”.
  - 3) The RFP attachments and other documentation placed in the extra proposal sets may reflect photocopied signatures.
- e. Do not mark any portion of the proposal response, any RFP attachment, or other item of required documentation as “Confidential” or “Proprietary”. CDPH will disregard any language purporting to render all or portions of a proposal confidential.

## 3. Content requirements

This section specifies the order and content of each proposal. Assemble the materials in each proposal set in the following order:

- a. Proposal Cover Page

A person authorized to bind the Proposer must sign the Proposal Cover Page **(Attachment 1)**. If the Proposer is a corporation, a person authorized by the Board of Directors to sign on behalf of the Board must sign the Proposal Cover Page.

b. Table of Contents

Properly identify each section and the contents therein. Paginate all items in each section with the exception of those items placed in the Forms Section and Appendix Section.

c. Executive Summary Section

This section must not exceed three (3) pages in length. Evaluators may not review or evaluate excess pages.

In preparing the Executive Summary, do not simply restate or paraphrase information in this RFP. Describe or demonstrate, in the Proposer's own words, the following information.

- 1) An understanding of CDPH's needs and the importance of this project.
- 2) The tangible results that are expected to be achieved.
- 3) A sincere commitment to perform the scope of work in an efficient and timely manner.
- 4) How this project will be effectively integrated into the proposing firm's current obligations and existing workload.
- 5) Why the proposing firm should be chosen to undertake this work at this time.

d. Agency Capability Section

- 1) Include a brief history of the proposing firm, including:
  - a) Date of establishment. If applicable, explain any changes in business history (i.e., name change, ownership, partnership arrangements, etc.) or organizational structure that will assist CDPH in determining the qualifications of the proposing firm.
  - b) A description of the proposing firm's goals that are relevant, closely related, or will complement this project.
  - c) A demonstrated organizational commitment to domestic violence prevention issues.
- 2) Describe experience that qualifies the proposing firm to undertake this project. At a minimum, demonstrate the proposing firm possesses two consecutive years of experience of the types listed in this section. Please also include any experience as it relates to *primary prevention* strategies, projects, or programs. All experience must have occurred within the past five years. It is possible to attain the experience types listed below during the same time period. Proposers must have experience in:
  - Provision of statewide training and technical assistance on domestic violence prevention to diverse audiences in California;
  - Developing, implementing, and evaluating training curricula and collateral materials;

- Designing, developing, and producing camera-ready media and educational materials for replication or online dissemination (i.e., PDF format);
  - Designing, planning, and coordinating statewide meetings and conferences.
  - Collaborating and partnering with varied organizations and diverse constituencies to build capacity on domestic violence prevention in California;
  - Developing and implementing a comprehensive evaluation plan;
  - Conducting needs and resource assessment activities, including key informant interviews and surveys, to determine the training needs of particular populations;
  - Communicating and disseminating information and materials to various audiences statewide through teleconferences, listserves, web conferences, or other medium of communication; and
  - Performing administrative functions such as entering into subcontracts with other agencies, and reimbursing individuals for travel per diem and costs.
- 3) Briefly, describe the accounts or work projects begun and/or completed in the past five years that involved services similar in nature or closely related to the Scope of Work in this RFP. For each account or project listed, include the following information:
- a) Name of agency or firm for whom services were performed,
  - b) Duration or length of the project,
  - c) Total cost or value of the project,
  - d) Indicate if the account or project is “active/open” or “closed/settled”,
  - e) Describe briefly the type and nature of the services performed.
- 4) Briefly describe any experience that demonstrates the proposing firm’s ability to establish and maintain effective working relationships with government entities, state level organizations, local community based organizations, and private nonprofit organizations.
- 5) Identify three client references that the proposing firm has serviced in the past five years that can confirm their satisfaction with the services and confirm if the proposing firm provided timely and effective services or deliverables. Use the Client References form (**Attachment 4**) for this purpose. **Place the completed Client References form in the Forms Section of the proposal.**

e. Work Plan Section

- 1) Overview
- a) CDPH is interested in proposals that provide well-organized, comprehensive and technically sound business solutions. **Vague explanations will undermine your firm’s credibility and will result in reduced proposal scores.**
  - b) The *Work Plan Description* (section 3 below) must include an in-depth discussion and description of the core activities, methods, and approaches that will be used to fulfill all Scope of Work requirements.
  - c) The *Work Plan Content* (section 4 below) must include all Scope of Work requirements, in the order and language provided in this RFP. Content for the Work Plan must include detailed activities and steps proposed to complete project goals and objectives.

2) Rejection of tasks, activities, or functions

If full funding does not become available, is reduced, or CDPH determines that it does not need all of the services described in this RFP, CDPH reserves the right to offer an amended contract for reduced services.

3) Work Plan Description

Provide an in-depth discussion and description of the core activities, methods, and approaches that will be carried out to fulfill all Scope of Work requirements. Provide details to demonstrate that your overall approaches and/or methods are comprehensive and technically sound. For each activity listed in your Work Plan, include the following:

- a) Provide a rationale basis for choosing particular approaches and methods (i.e., proven success or past effectiveness). If applicable, explain what is unique, creative, or innovative about your proposed approaches and/or methods.
- b) If you envision any major complications or delays at any stage of performance, describe those complications or delays and include a proposed strategy for overcoming those issues. Likewise, indicate if you do not anticipate any major complications or delays.
- c) Indicate the assumptions you made in developing the Work Plan in response to CDPH's Scope of Work. For each assumption listed, explain the reasoning or rationale that led you to that assumption. Likewise, indicate if no assumptions were made.
- d) If the nature of a task or function hinders specific delineation of in-depth methods and procedures (e.g., a task is dependent upon a future action or multiple approaches may be used), explain the probable methods, approaches, or procedures that you will use to accomplish the task or function. Also, describe, in this instance, how you will propose the ultimate strategies and detailed plans to CDPH for full consideration and approval before you proceed to carry out the project.
- e) If applicable, identify any additional Contractor and/or State responsibilities that you included in your Work Plan that you believe are necessary to ensure successful performance, but you believe were omitted from CDPH's Scope of Work. Likewise, indicate if no additional Contractor and/or State responsibilities, outside of those identified in CDPH's SOW, were included in your Work Plan.

4) Work Plan Content

The Work Plan must include projected performance time lines, core activities, and step-by-step actions used to fulfill all Scope of Work (**Exhibit A**) requirements.

Complete the Work Plan (**Attachment 14**) including the following:

- a) Major Objectives: List quantified and *measurable* objectives related to achieving the Scope of Work. Objectives must include time for completion.
- b) Major Functions, Tasks, and Activities: Identify the specific functions, tasks, and activities that you will perform in the order you believe they will occur that will lead to achieving each objective.

Indicate who will have primary responsibility for performing each major function, task, and activity. If known, identify the name and position title of all key personnel, subcontractors, and/or consultants that will perform the work.

If the responsible party is unknown or not yet identified, identify a staff position title or project name/title and indicate "TBD" which is the abbreviation for "to be determined."

- c) **Timeline:** Include a performance time line for each major function, task, and activity that is realistic and achievable. Indicate the approximate beginning and ending month and year. If a task/activity or function will only occur in one fiscal period or year, indicate the beginning and ending month and year.

If desirable, in addition to start and end dates, you may use other terms such as start-up, on-going, continuous, take-over, turn-over, etc., to describe the performance time line. In doing so, you must define the meaning of each unique term that you use.

- d) **Performance Measures and/or Deliverables:** Indicate how you will measure and/or prove the completion of objectives and tasks.

f. Management Plan Section

- 1) Describe how the proposing firm will effectively coordinate, manage, and monitor the efforts of the assigned staff, including subcontractors and/or consultants, if any, to ensure that all tasks, activities, and functions are completed effectively and in a timely manner.
- 2) Describe the fiscal accounting processes and budgetary controls that will be employed to ensure the responsible use and management of contract funds and accurate invoicing. Include at a minimum, a brief description of all of the following:
  - a) How the costs incurred under this project will be appropriately accounted for and only applicable project expenses will be billed to CDPH (e.g., use of unique account/project codes, etc.).
  - b) The proposing firm's fiscal reporting and monitoring capabilities (e.g., spread sheets, automated fiscal reports, quality controls, checks and balances, etc.) to ensure contract funds are managed responsibly.
  - c) Proposed billing or invoicing frequency (not more frequently than once per month). Electronic billing is not possible.
  - d) Identify the documentation that will be retained on file or submitted to CDPH upon request to prove, support, and/or substantiate the expenses that are invoiced to CDPH.
- 3) Include an organization chart. Instructions are explained in the Appendix Section. **Place the organization chart in the Appendix Section of the proposal.**

g. Project Personnel Section

- 1) In this section, describe the proposed staffing plan. Based on the scope of work requirements for subcontracts for expert trainers and consultants, and the costs

associated with procuring varied marketing materials, CDPH recommends that Proposers consider a core staffing pattern consisting of the following or similar positions:

- Project Manager (1 FTE) – 100%
- Technical Assistance and Training Coordinator (1 FTE) – 100%
- Administrative or Clerical support (1 FTE) – 100%

In the staffing plan, include at a minimum:

- a) Position titles for all proposed employees (persons on the proposing firm's payroll).
- b) Number of personnel in each position.
- c) By position, indicate the full time equivalent (FTE) or percentage of staff time devoted to this project (e.g., full time = 1.0, 1/2 time = .50, 3/4 time = .75, 1/4 time = .25, projected number of hours, if hourly, etc.).
- d) Monthly salary rate or wage range for each position title. It is the Proposer's responsibility to project annual merit increases and/or cost of living increases into each wage rate.

**Note:** Salary rates paid to contract staff should not normally exceed the rates paid to State personnel holding comparable classifications or performing duties with a comparable level of responsibility. CDPH reserves the right to require substantiation of any proposed cost of living percentage/rate increase that exceeds those anticipated to be granted to California state civil service employees during the resulting contract term. CDPH further reserves the right to negotiate a lower cost of living percentage increase/amount if CDPH determines the proposed cost of living percentage/rate increase is less than fully justified or is excessive.

- e) Include a job description or duty statement for each position title or classification that will perform work under this project. The job descriptions must indicate the typical tasks and responsibilities that will be assigned to the position and may include desired or required education and experience. **Place all job descriptions or duty statements at the end of the Project Personnel Section.**
- f) Identify by name and/or position title, each key staff person that will have primary responsibility for managing, directing, overseeing and/or coordinating the work of assigned staff, subcontractors and/or independent consultants and who will maintain effective communications with CDPH (i.e., Project or Program Manager, Project or Program Director, Contract Manager, etc.).
  - i. Briefly, describe each person's expertise, capabilities, and credentials.
  - ii. Emphasize any relevant past experience in directing, overseeing, coordinating, or managing other government projects.
- g) Include a one to two (1-2) page resume for each key staff person (professional, managerial or supervisory) that will exercise a major administrative, policy, or consulting role in carrying out the project work. **Place staff resumes in the Appendix Section.** To the extent possible, resumes should not include personal

information such as a social security number, home address, home telephone number, marital status, sex, birth date, age, etc.

- 2) Briefly, describe the administrative policies or procedures that will be used to ensure that the proposing firm will recruit and select well-qualified, competent, and experienced in-house staff, subcontractors, and/or independent consultants.
  - a) If employee recruitment/selection policies or procedures are present in an operations manual, Proposers may cite excerpts from such manuals. Do not simply indicate that such policies exist and do not attach copies of any policies or manuals to the proposal. If deemed necessary, CDPH may request copies of the Proposer's existing manuals or policies.
- 3) Briefly, describe the processes or procedures that will be used to ensure that vacancies are filled expeditiously and that services are continued despite the presence of vacancies.
- 4) If subcontractors (including independent consultants) will be used to perform contract services, Proposers must do the following at the time of proposal submission:
  - a) Indicate if the Proposer has pre-identified any firms/persons to perform the work or if the Proposer will recruit them later.
    - i. For each pre-identified subcontractor and independent consultant include:
      - A. Full legal name.
      - B. A job description or duty statement that outlines the duties and functional responsibilities that will be assigned to the subcontracted firm or independent consultant.
      - C. A brief explanation as to why the subcontracted firm or independent consultant was chosen. Stress things such as applicable skills, knowledge, capabilities, past experience or accomplishments, availability, reasonableness of rates, notoriety in a field or specialty, etc.
      - D. A one to two (1-2) page resume for each pre-identified subcontractor and independent consultant. **Place all subcontractor and/or consultant resumes in the Appendix Section.** To the extent possible, resumes should not include personal information such as a social security number, home address, home telephone number, marital status, sex, birth date, age, etc.
      - E. A letter of agreement, signed by an official representative of each subcontracted firm or independent consultant. **Place all subcontractor and/or consultant letters of agreement in the Appendix Section.**

Specific subcontractor and/or independent consultant relationships proposed in response to this RFP (i.e., identification of pre-identified subcontractors and independent consultants) shall not be changed during the procurement process or prior to contract execution. The pre-identification of a subcontractor or independent consultant does not affect CDPH's right to approve personnel or staffing selections or changes made after the contract award.

- ii. For subcontractors and/or independent consultants that cannot be identified when the proposal is submitted to CDPH or are to be determined (TBD) after the contract is executed, include:
  - A. An identification of the functions, activities, and responsibilities that will be assigned to each subcontractor and/or independent consultant.
  - B. A description of the process that will be used to obtain CDPH approval of each subcontractor and/or independent consultant selection along with approval of their budgeted costs and assigned responsibilities.

h. Facilities and Resources Section

Describe the following as it relates to the Proposer's capacity to perform the scope of work:

- 1) Current office facilities at the Proposer's disposal including number of offices owned or leased, square footage, number of staff housed and physical location or address.
- 2) Current support services and office equipment capabilities immediately available and/or accessible for use in carrying out the proposed scope of work. Include such things as, but not limited to:
  - a) A description of the range and/or type of support services available and number of staff.
  - b) Web conferencing, teleconferencing or telecommunications capabilities.
  - c) Printing/reproduction or photocopying capabilities.
  - d) Computer hardware and system capabilities (i.e., number, type, size, age, capacity and speed of personal computers or work stations and servers; Local Area Network capabilities, Wide Area Network capabilities; data transfer capabilities (disk or tape), data storage capacity, video/graphics capabilities, etc.).
  - e) Software applications in use (word processing applications, spread sheet applications, data base applications, graphics development applications, Web page design applications, unique or other specialized software applications, etc.).
  - f) Other support functions or capabilities that can be accessed and/or utilized.

i. Cost Section

- 1) Basic content

The Cost Section will consist of the following documents:

- a) Cost Proposal form (**Attachment 15**).
- b) Budget Detail Work Sheet(s) (**Attachments 16, 18, and 20**) for each budget period.
- c) Subcontractor Budgets (**Attachments 17, 19, and 21**) for any budget period.
- d) Required cost justification and documentation described later in this section.

- 2) General instructions

- a) All cost forms (Cost Proposal form and Budget Detail Work Sheets and Subcontractor Budgets) must be typewritten or completed in ink. Errors, if any, should be crossed out and corrections should be printed in ink or typewritten adjacent to the error. The person who signs the Cost Proposal should initial all corrections preferably in blue ink.
  - b) On the Cost Proposal form, indicate the annual cost for each full or partial budget period and include a total cost.
  - c) When completing the cost forms, include all estimated costs to perform the services for the entire term, including applicable annual rate adjustments attributable to merit increases, profit margins, and inflation or cost of living adjustments.
- 3) Required Budget Detail Work Sheets
- a) Include with the Cost Proposal form (**Attachment 15**), a Budget Detail Work Sheet (**Attachments 16, 18, and 20**) and Subcontractor Budgets (**Attachments 17, 19, and 21**) for each state fiscal year or budget period.
  - b) On each Budget Detail Work Sheet, provide specific cost breakdowns for the budget line items identified in this section.
  - c) All unit rates/costs, if any (i.e., square footage, salary rates/ranges, hourly rates, etc.), must be multiplied out and totaled for each budget period.
  - d) Please report costs using whole dollars only. Round fractional dollar amounts or cents to the nearest whole dollar amount.
  - e) When completing the Budget Detail Work Sheet(s) and Subcontractor Budgets, Proposers may create like images or computerized reproductions of the Budget Detail Work Sheets and Subcontractor Budgets included in this RFP. Use as many pages as are necessary to display the detailed budgeted costs. The Budget Detail Work Sheet attachments included in this RFP are not intended to dictate the specific costs that are to be reported, but are intended to show the required format for reporting proposed budget detail.
  - f) Identify the projected detailed expenses for each line item identified below by following the instructions herein.
    - i. Personnel costs**
      - A. Identify each funded position title or classification.
      - B. Indicate the number of personnel in each position/classification.
      - C. Indicate the full time equivalent (FTE) or annual percentage of time/effort for each position (i.e., full time = 1.0, 1/2 time = .50, 3/4 time = .75, 1/4 time = .25, number of hours, if hourly, etc.).
      - D. Identify the monthly salary rate or range for each position/classification. Include paid leave benefits such as sick leave, vacation, annual leave, holiday pay, etc. in the salary rates or ranges.
      - E. Project an annual total for each position/classification.
      - F. If applicable, enter \$0 if no personnel costs will be incurred.
      - G. Enter the grand total for salary/wage expenses.

**ii. Fringe Benefits**

Include fringe benefit expenses including, but not limited to, costs for worker's compensation insurance; unemployment insurance, health, dental, vision and/or life insurance; disability insurance; pension plan/retirement benefits; etc.

- A. Display fringe benefit costs as a percentage rate of the total personnel costs.
- B. If applicable, enter \$0 if no fringe benefit costs will be incurred.

**iii. Operating Expenses (also referred to as General expenses)**

Identify all direct project costs. CDPH recommends that a minimum of \$50,000 be budgeted for the design and/or purchase of collateral materials in the first year of the contract, and \$25,000 for the second year. Direct project costs may include but are not limited to the following expense items:

- A. Facility rental (i.e., office space, storage facilities, etc.). Include the amount of square footage and the rate per square foot.
- B. Consumable office supplies.
- C. Minor equipment purchases (i.e., items with a unit cost of less than \$5,000 and a useful life of one year or more).
- D. Telecommunications (i.e., telephone or cellular telephones, fax, Internet service provider fees, etc.).
- E. Reproduction/printing/duplication.
- F. Postage or messenger/delivery service costs.
- G. Equipment/furniture rental/lease and maintenance.
- H. Software (including license fees, upgrade/maintenance fees, etc.).
- I. If applicable, enter \$0 if no operating expenses will be incurred.

**iv. Equipment Expenses**

- A. CDPH will not reimburse equipment purchases under the resulting contract.
- B. CDPH primarily classifies equipment as Major Equipment, Minor Equipment, and Miscellaneous Property. Major Equipment is defined as a tangible or intangible item with a base unit cost of \$5,000 or more and a life expectancy of one year or more that is purchased or reimbursed with agreement funds. Major equipment expenses, when allowed, is budgeted in this expense line item. Minor Equipment is defined as a tangible item with a base unit cost of less than \$5,000 and a life expectancy of one year or more and is on CDPH's Minor Equipment List and that is purchased or reimbursed with agreement funds. Minor equipment expenses, when allowed, are budgeted as an operating expense
- C. Enter \$0 in this line item.

**v. Subcontract Expenses**

- A. Specify a total cost for all subcontracted services (including those performed by independent consultants). Subcontractors include any persons/firms performing contract services that are not on the Proposer's payroll. CDPH recommends that a minimum of \$25,000 be budgeted for

model program consultants/trainer subcontracts for each year of the contract.

- B. If a Proposer intends to use subcontractors (including independent consultants), provide the information below depending on whether subcontractors are known/pre-identified or have yet to be determined.
  - 1. For **known/pre-identified** subcontractors or independent consultants, identify each subcontractor/consultant by name and include a separate expense breakdown for each of the subcontractor's costs for personnel expenses including fringe benefits, operating or general expenses, travel, subcontracts, and indirect costs. **Use Attachments 17, 19, and 21 if more than two subcontracts are anticipated.**
  - 2. For **unknown/unidentified** subcontractors or independent consultant, list a title for each subcontracted activity/function and indicate a total projected cost for each activity/function to be out sourced.
- C. If applicable, enter \$0 if no subcontract expenses will be incurred.

**vi. Travel Expenses**

- A. Indicate the total cost for travel and per diem. Include costs for expenses such as airfare, mileage reimbursement, parking, toll bridge fees, taxicab fares, overnight lodging and meal expenses, etc.
- B. If applicable, enter \$0 if no travel expenses will be incurred.

**vii. Other Costs**

- A. Indicate here those direct project expenses that do not clearly fit into the other budget line items. Such costs may include, but are not limited to training/conference registration fees, publication production costs, costs for educational material development or other items unique to performance.
- B. Itemize each expense item and its cost.
- C. If any service, product, or deliverable will be provided on a fixed price or lump sum basis, name the items and/or deliverable and indicate "fixed price" or "lump sum" next to the item along with the price or fee.
- D. If applicable, enter \$0.

**viii. Indirect Costs**

- A. Indicate the indirect cost percentage rate and the cost basis upon which it was determined (i.e., personnel excluding benefits or personnel including benefits or total direct expenses).
- B. If applicable, enter \$0.

**ix. Total Costs**

Enter a total annual cost for the stated fiscal year or budget period. Make sure all itemized costs equal this figure when added together.

- 4) Required cost justification/documentation

In the Cost Section of the proposal, include the following facts and information to explain the reasonableness and/or necessity of the proposed budgeted costs.

- a) Discuss how the number of project-funded staff, their proposed duties, and time commitments are sufficient to achieve the proposed services and activities.
- b) Include wage and/or salary justifications, including but not limited to:
  - i. How salary rates or ranges were determined.
  - ii. Explain any cost of living, merit or other salary adjustments that are included in the personnel line item. Explain how the amount of each adjustment was determined and explain the frequency or interval at which the adjustment is to be granted. **This only applies if the personnel expense line item includes merit increases, cost of living, or other salary adjustments.**

In light of the State's fiscal uncertainties, CDPH reserves the right to negotiate a lower cost of living percentage increase/amount or withhold approval of any projected cost of living increase in any contract budget year if the Proposer's projected increase exceeds the cost of living adjustment granted to civil service employees during the same fiscal period.

- c) Fringe benefit explanation. **This requirement only applies if fringe benefit expenses are budgeted.**
  - i. Identify and/or explain the expenses that make up fringe benefit costs. Typical fringe benefit costs can include worker's compensation insurance; unemployment insurance, health, dental, vision and/or life insurance; pension plan/retirement benefits; etc.
  - ii. If applicable, identify any positions that do not earn fringe benefits and/or that receive different benefit levels.
- d) Subcontractor/independent consultant use and fees/rates and costs. **This requirement only applies if subcontractor (including independent consultant) costs are budgeted.**
  - i. Discuss the necessity of using each subcontractor and/or independent consultant. Explain what contributions their services and expertise will add to the funded project.
  - ii. Provide a justification for the fees/wages budgeted for **known/pre-identified** subcontractors (including independent consultants). Include information, such as, but not limited to, the subcontractor's or consultant's current pay rate, past wage/salary/fee history, standard industry rates paid for comparable/similar services. If applicable, explain other factors used to determine the proposed pay levels such as notoriety in a specific field, possession of expert credentials, etc. that explain the reasonableness of the proposed costs/fees or wage rates.
  - iii. For **unknown/unidentified** subcontractors (including consultants), explain how the budgeted amount for each proposed subcontracted activity or function was determined.

- e) Travel expense justification/explanation. **This requirement only applies if travel expenses are budgeted.**
- i. If proposed travel expenses equal \$25,000 or more in any budget period, itemize all major travel and per diem expenses. At a minimum, include an estimated number of trips, to and from destinations, length of travel per trip (i.e., number of days and nights), number of travelers, and mode of transportation.
  - ii. **Note:** Travel reimbursement generally may not exceed the current rates paid to non-represented State employees.

Expenses exceeding current State rates must be explained and justified and are subject to prior CDPH approval. Request a copy of the State employee travel reimbursement rates if CDPH failed to attach the rates to the RFP (e.g., the Travel Reimbursement Information exhibit).

State employees receive discounted lodging rates in many areas. In justifying per diem costs, indicate if the Proposer does not have access to the same discounted rates offered to State employees.

- iii. If travel expenses are less than \$25,000 in any budget period, briefly explain how the proposed travel costs were determined.
- f) Other costs explanation. **This requirement only applies if “Other costs” are budgeted.**
- i. Itemize each expense item making up the “Other Costs” line item.
  - ii. Explain why each expense item is necessary. Also, explain how the amount of each expense was determined.
  - iii. If any services or deliverables are offered on a fixed price or lump sum basis, explain how the price or cost was determined.
- g) Indirect cost rate explanation. **This requirement only applies if indirect costs are budgeted and the allowable reimbursement rate was not pre-set by CDPH.**

Explain briefly, how the proposed indirect cost rate was determined (i.e., how the percentage was set and what administrative costs were considered in setting the rate).

- h) Include, at the Proposer’s option, any other information that will assist CDPH to understand how the proposed costs were determined and why the proposed costs are reasonable, justified, and/or competitive. Unless discussed elsewhere within this section, explain any unusually high or disproportionate cost elements appearing in any budget line item.

j. Appendix Section

Place the following documentation in the Appendix Section of the proposal in the order shown below.

1) **Proof of Corporate status**

If the Proposer is a Corporation, submit **either** a copy of the proposing firm's most current Certificate of Status issued by State of California, Office of the Secretary of State **or** submit a downloaded copy of the proposing firm's on-line status information from the California Business Portal website of California's Office of the Secretary of State. Include an explanation if this documentation cannot be submitted. Unless otherwise specified, do not submit copies of the proposing firm's Bylaws or Articles of Incorporation.

2) **Proof of Nonprofit status**

Nonprofit organizations must prove they are legally eligible to claim "nonprofit" and/or tax-exempt status by submitting a copy of an IRS determination letter indicating nonprofit or 501 (3) (c) tax-exempt status. Submit an explanation if this documentation cannot be supplied.

3) **An organization chart**

The organization chart must show the distinct lines of authority between and among the divisions that will perform the project work and the primary reporting relationships within the Proposer's organization. Show the relationships between management, key decision makers, supervisory personnel and subcontractors and/or independent consultants, if any.

4) **Financial statements**

Audited statements are preferred, but not required. If audited financial statements are supplied, all noted audit exceptions must be explained. CDPH will accept financial statements prepared by a Proposer's financial accounting department, accounting firm or an auditing firm. A statement signed by a Proposer's Chief Financial Officer certifying that the financial statements are accurate and complete must accompany all financial statements.

5) **Staff resumes**

Resume specifications appear in the Project Personnel Section. To the extent possible, resumes should not exceed 1-2 pages in length per person and should not include personal information such as a social security number, home address, home telephone number, home email address, marital status, sex, birth date, age, etc.

6) **Subcontractor/Consultant resumes**

Submit a resume for each pre-identified subcontractor or independent consultant, if any, as discussed in the Project Personnel Section. To the extent possible, resumes should not exceed 1-2 pages in length per person and should not include personal information such as a social security number, home address, home telephone number, home email address, marital status, sex, birth date, age, etc.

7) **Subcontractor/Consultant letters of agreement**

For each pre-identified subcontractor and independent consultant that will be used to perform services under the resulting contract, submit a letter of agreement to work on this project.

A letter of agreement must be signed by an official representative of each subcontracted firm or independent consultant, indicating his or her acknowledgement of being named as a subcontractor or consultant, their availability to work on this project and acknowledgement that they have read or been made aware of the proposed contract terms, conditions and exhibits. Include an explanation if a letter of agreement cannot be obtained from each pre-identified subcontractor and consultant and indicate when a letter of agreement will be forthcoming.

k. Forms Section

Complete, sign, and include the forms/attachments listed below. When completing the attachments, follow the instructions in this section and any instructions appearing on the attachment. After completing and signing the applicable attachments, assemble them in the order shown below.

<b>Attachment #, Name, or Documentation</b>	<b>Instructions</b>
2 - Required Attachment / Certification Checklist	1) Check each item with “Yes” or “N/A”, as applicable, and sign the form. If necessary, explain the choices.  2) If a Proposer marks “Yes” or “N/A” and makes any notation on the checklist and/or attaches an explanation to the checklist to clarify their choice, CDPH considers this a “qualified response”. Any “qualified response”, determined by CDPH to be unsatisfactory or insufficient to meet a requirement, may cause a proposal to be deemed nonresponsive.
3 - Business Information Sheet	Completion of the form is self-explanatory.
4 - Client References	Identify three (3) clients serviced within the past five years that can confirm their satisfaction with the Proposer’s services and confirm that the Proposer provided timely and effective services or deliverables. If possible, identify clients whose needs were similar in scope and nature to the services sought in this RFP. List the most recent first.
5 - RFP Clause Certification	Complete and sign this form indicating a willingness and ability to comply with the contract certification clauses appearing in the RFP section entitled, “Bid Requirements and Information,” subsection “Bidding Certification Causes”.
6 - CCC 307 – Certification	Complete and sign this form indicating a willingness and ability to comply with the Contractor Certification Clauses appearing in this Attachment. The attachment supplied in this bid represents only a portion of the contractor information in this document. Visit this web site to view the entire document: <a href="http://www.ols.dgs.ca.gov/Standard+Language/default.htm">http://www.ols.dgs.ca.gov/Standard+Language/default.htm</a> .
7 - Payee Data Record	Complete and return this form, <u>only</u> if the proposing firm has not previously entered into a contract with CDPH. If uncertain, complete and return the form.

Attachment #, Name, or Documentation	Instructions
8 - Follow-on Consultant Contract Disclosure	Complete and sign this form. If applicable, attach to this form the appropriate disclosure information.
9a - Actual DVBE Participation and applicable DVBE certification(s) <b>and/or</b> 9b - Good Faith Effort with required documentation	Read and carefully follow the completion instructions in Attachment 9. Attach the documentation that is required for the form(s) that are submitted. One and/or both of these two forms may be required. <b>Submission of the forms identified here only applies to contract awards that will equal \$10,000 or more for the entire contract term.</b>
10a-Non-Small Business Subcontractor Preference Request  10b-Small Business Subcontractor / Supplier Acknowledgement	<b>Submission of these forms is optional.</b> Read and carefully follow the completion instructions in Attachments 10, 10a, and 10b. Complete and return Attachments 10a and 10b <u>only</u> if the bidding firm is a not a certified small business but is requesting a subcontractor bidding preference by committing to use one or more certified small business subcontractors for an amount equal to at least 25% of the total bid price.
11a-DVBE Subcontractor Incentive Request  11b-DVBE Subcontractor/ Supplier Acknowledgement	<b>Submission of these forms is optional.</b> Read and carefully follow the completion instruction in Attachments 11, 11a, and 11b. Complete and return Attachments 11a and 11b <u>only</u> if the bidding firm is requesting a subcontractor bidding incentive by committing to use one or more certified DVBE business subcontractors in the amount indicated in the bid package.
12 - Target Area Contract Preference Act Request	<b>Submission of this form is optional.</b> Complete and return this form, <u>only</u> if the proposing firm is based in California, <u>and</u> the total bid price is \$100,000 or more, <u>and</u> CDPH has not pre-set any part of the work location, <u>and</u> the Proposer wishes to apply for TACPA preference.
13 - Enterprise Zone Act (EZA) Preference Request	<b>Submission of this form is optional.</b> Complete and return this form, <u>only</u> if the proposing firm is based in California, <u>and</u> the total bid price is \$100,000 or more, <u>and</u> CDPH has not pre-set any part of the work location, <u>and</u> the Proposer wishes to apply for EZA preference.

**K. Proposal Submission**

**1. General Instructions**

- a. Assemble an original and five (5) copies of the proposal together. Place the proposal set marked "Original" on top, followed by the five (5) extra copies.
- b. Place all proposal copies in a single envelope or package, if possible. Seal the envelope or package.

If more than one envelope or package is submitted, carefully label each one as instructed below, and mark on the outside of each envelope or package “1 of X”, “2 of X”, etc.

- c. Mail or arrange for hand delivery of the proposal to the California Department of Public Health’s Contract Management Unit (CMU). Proposals may not be transmitted electronically by fax or email.
- d. The Contract Management Unit must receive the proposal, regardless of postmark or method of delivery, by the date and time stated in the section entitled, “Time Schedule.” Late proposals will not be reviewed or scored.
- e. Label and submit the proposal using one of the following methods.

Hand Delivery or Overnight Express:	U.S. Mail:
<p><b>Proposal RFP 08-85191</b>                      California Department of Public Health                      Contract Management Unit                      Mail Station 1802                      1501 Capitol Avenue, Suite 71.5178                      Sacramento, CA 95814</p>	<p><b>Proposal RFP 08-85191</b>                      California Department of Public Health                      Contract Management Unit                      Mail Station 1802                      P.O. Box 997377                      Sacramento, CA 95899-7377</p>

**f. Proposer warning**

- 1) CDPH’s internal processing of U.S. mail may add 48 hours or more to the delivery time. If the proposal is mailed, consider using certified or registered mail and request a receipt upon delivery.
- 2) For hand deliveries, allow sufficient time to locate on street metered parking and to sign-in at the security desk. If detained at the security desk, ask security personnel to call the CDPH Contract Management Unit at 650-0100 to arrange for proposal pickup and receipt issuance. Proposers are warned not to surrender their proposals in the care of a person other than CDPH Contract Management Unit staff.
- 3) Courier service personnel must sign-in at the security station and must obtain an access key card. Couriers will then be able to access pre-determined areas. If detained at the security desk, ask security personnel to call the CDPH Contract Management Unit at 650-0100 to have a Contract Management Unit staff member collect the proposal package(s) and to issue a receipt. Couriers are warned not to surrender proposals in the care of a person other than CDPH Contract Management Unit staff.

**2. Proof of timely receipt**

- a. CDPH staff will log and attach a date/time stamped slip or bid receipt to each proposal package/envelope received. If a proposal envelope or package is hand delivered, CDPH staff will give a bid receipt to the hand carrier upon request.
- b. To be timely, CDPH’s Contract Management Unit must receive each proposal at the stated delivery address **no later than 4:00 p.m.** on the proposal submission due date. Neither delivery to the department’s mailroom, or to the CDPH program that issued this RFP, or a U.S. postmark will serve as proof of timely delivery.

- c. CDPH will deem late proposals nonresponsive.

**3. Proposer costs**

Proposers are responsible for all costs of developing and submitting a proposal. Such costs cannot be charged to CDPH or included in any cost element of a Proposer’s price offering.

**L. Evaluation and Selection**

A multiple stage evaluation process will be used review and/or score technical proposals. CDPH will reject any proposal that is found to be nonresponsive at any stage of evaluation.

**1. Stage 1 – Required Attachment / Certification Checklist review**

- a. Shortly after the proposal submission deadline, CDPH staff will convene to review each proposal for timeliness, completeness, and initial responsiveness to the RFP requirements. This is a pass/fail evaluation.
- b. In this review stage, CDPH will compare the contents of each proposal to the claims made by the Proposer on the Required Attachment / Certification Checklist to determine if the Proposer’s claims are accurate.
- c. If deemed necessary, CDPH may collect additional documentation (i.e., missing forms, missing data from RFP attachments, missing signatures, etc.) from a Proposer to confirm the claims made on the Required Attachment / Certification Checklist and to ensure that the proposal is initially responsive to the RFP requirements.
- d. If a Proposer’s claims on the Required Attachment / Certification Checklist cannot be proven or substantiated, the proposal will be deemed nonresponsive and rejected from further consideration.

**2. Stage 2 – Narrative proposal evaluation/scoring**

- a. Proposals that appear to meet the basic format requirements, initial qualification requirements and contain the required documentation, as evidenced by passing the Stage 1 review, will be submitted to a rating committee.

Raters will individually and/or as a team review, evaluate and numerically score proposals based on the proposal’s adequacy, thoroughness, and the degree to which it complies with the RFP requirements.

- b. CDPH will use the following scoring system to assign points. Following this chart is a list of the considerations that raters may take into account when assigning individual points to a technical proposal.

Points	Interpretation	General basis for point assignment
<b>0</b>	<b>Inadequate</b>	Proposal response (i.e., content and/or explanation offered) is inadequate or does not meet CDPH’s needs/requirements or expectations. The omission(s), flaw(s), or defect(s) are significant and unacceptable.

Points	Interpretation	General basis for point assignment
1	<b>Barely Adequate</b>	Proposal response (i.e., content and/or explanation offered) is barely adequate or barely meets CDPH's needs/requirements or expectations. The omission(s), flaw(s), or defect(s), are inconsequential and acceptable.
2	<b>Fully Adequate</b>	Proposal response (i.e., content and/or explanation offered) is fully adequate or fully meets CDPH's needs/requirements or expectations. The omission(s), flaw(s), or defect(s), if any, are inconsequential and acceptable.
3	<b>Excellent or Outstanding</b>	Proposal response (i.e., content and/or explanation offered) is above average or exceeds CDPH's needs/requirements or expectations. Minimal weaknesses are acceptable. Proposer offers one or more enhancing feature, method or approach that will enable performance to exceed CDPH's basic expectations.

c. In assigning points for individual rating factors, raters may consider issues including, but not limited to, the extent to which a proposal response:

- 1) Is lacking information, lacking depth or breadth or lacking significant facts and/or details, and/or
- 2) Is fully developed, comprehensive and has few if any weaknesses, defects or deficiencies, and/or
- 3) Demonstrates that the Proposer understands CDPH's needs, the services sought, and/or the contractor's responsibilities, and/or
- 4) Illustrates the Proposer's capability to perform all services and meet all scope of work requirements, and/or
- 5) If implemented, will contribute to the achievement of CDPH's goals and objectives, and/or
- 6) Demonstrates the Proposer's capacity, capability and/or commitment to exceed regular service needs (i.e., enhanced features, approaches, or methods; creative or innovative business solutions).

d. Below are the point values and weight values for each rating category that will be scored.

- 1) Proposals, excluding the Cost Section, will be scored on a scale of 0 to 231 points, as follows:

<u>Rating Category</u>	<u>Points</u>	<u>X</u>	<u>Weight</u>	<u>=</u>	<u>Total</u>
Executive Summary	15	X	1.0	=	15
Agency Capability	42	X	2.0	=	84
Work Plan	33	X	2.0	=	66
Management Plan	21	X	1.0	=	21
Project Personnel	24	X	1.5	=	36

<b>Rating Category</b>	<b>Points</b>	<b>X</b>	<b>Weight</b>	<b>=</b>	<b>Total</b>
Facilities and Resources	06	X	1.5	=	9
<b>Grand Total</b>					<b>231</b>

2) CDPH will consider a proposal technically deficient and nonresponsive if the proposal earns a score that is less than **211** points. Nonresponsive proposals will not advance to Stage 3.

**3. Stage 3 – Scoring the Cost Section**

- a. Proposers that earned a passing score in Stage 2 will have the Cost Section of their proposal scored and/or evaluated according to the multi-phase cost scoring process described herein.
- b. The rating team will evaluate the merits and effectiveness of the Cost Section of each proposal and assign cost points as described below. A total of 27 points can be earned in the cost evaluation phase.

<b>Cost Section Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
Upon reviewing the Budget Detail Work Sheets, has the Proposer made a good use of the contract funds?	<b>3</b>	
Upon reviewing the Budget Detail Work Sheets, did the Proposer allocate sufficient funds to each of the budgeted line items?	<b>3</b>	
Upon reviewing the Budget Detail Work Sheets, did the Proposer allocate sufficient funds to support the major program objectives or elements?	<b>3</b>	
Upon reviewing the Budget Detail Work Sheets, are the amounts allocated to the individual line items reasonable with none of the line item totals appearing to be excessive?	<b>3</b>	
Do the budget justifications and explanation supplied by the Proposer show that the costs are reasonable and/or appropriate?	<b>3</b>	
Upon reviewing the proposed salary/wage rates for in-house and subcontracted personnel, do the rates appear to be reasonable based upon the assigned level of responsibility and/or the person's salary history?	<b>3</b>	
Is there an appropriate fiscal balance between the costs allocated for in-house staff versus subcontracted personnel as it relates to the deliverables in the Scope of Work?	<b>3</b>	
Does it appear that the Proposer's Total Operating costs are reasonable and support the deliverables in the Scope of Work?	<b>3</b>	
Do the Operating Costs include line items to support each of the Scope of Work deliverables?	<b>3</b>	
<b>Cost Evaluation Score</b>	<b>Points earned = _____</b>	

- c. Following the cost evaluation phase, each Proposer's cost shall be converted to a point score using the pre-defined formula shown below and the sum of both cost evaluation phases shall be tallied to arrive at a total cost score.
  - 1) The proposal offering the lowest total cost earns 204 Cost points plus the points earned for the cost evaluation score. The remaining proposals earn cost points

through the cost conversion formula shown below. Final calculations shall result in numbers rounded to two decimal places.

- a)  $\frac{\text{Lowest Cost}}{\text{Another Cost}} = \text{Result 1}$
- b)  $\text{Result 1} \times (\text{multiplied by}) 204 (\text{cost points}) = \text{Result 2}$   
 $\text{Result 2} + (\text{added}) \text{ to } 27 (\text{cost evaluation score}) = \text{Cost Section Score}$

c) **Scoring example for illustration purposes only:**

Lowest price earns 204 points (cost points) + 27 (cost evaluation score).

Other Proposers earn cost scores as follows:

(low cost)  $\$100,000 \div (\text{another proposal cost}) \$127,000 = .7874$  (Result 1)  
(Result 1)  $.7874 \times 204 \text{ points (cost points)} = 160.63$  (Result 2)  
(Result 2)  $160.63 + 27 (\text{cost evaluation score}) = 187.63$

**4. Stage 4 – Combining Narrative Proposal Score and Cost Section Score**

CDPH will combine the narrative proposal score to the final Cost Section score and will tentatively identify the firm with the highest combined proposal score from each of the earlier evaluation stage(s).

**5. Stage 5 – Adjustments to Score Calculations for Bidding Preferences**

- a. CDPH will determine which firms, if any, are eligible to receive a bidding preference (i.e., small business or non-small business subcontractor preference, DBVE, TACPA, EZA, and/or LAMBRA).
- b. To confirm the identity of the highest scored responsive Proposer, CDPH will adjust the total score for applicable claimed preference(s) for those Proposers eligible for bidding preferences. CDPH will apply preference adjustments to eligible Proposers according to State regulations following verification of eligibility with the appropriate office of the Department of General Services. More information about the allowable bidding preferences appears in the RFP section entitled, "Preference Programs".

**6. Stage 6 – Final Score Calculation**

CDPH will use the formula shown below to calculate final proposal scores and to determine the highest scored proposal.

- a. Narrative Proposal Score x 70% = Technical Score
- b. Cost Section Score x 30% = Cost Score
  
- c. 
$$\begin{array}{r} \text{Technical Score} \\ + \text{Cost Score} \\ \hline = \text{Total Point Score} \end{array}$$

**M. Narrative Proposal Rating Factors**

Raters will use the following criteria to score the narrative portion of each proposal.

**1. Executive Summary**

<b>Executive Summary Rating Factors</b> [Not to exceed 3 pages]	<b>Points Possible</b>	<b>Points Earned</b>
To what extent did the Proposer express, in its own words, its understanding of CDPH needs, and the importance of this project? <b>Assign 1 point or 0 points if the Proposer restates or paraphrases information in the RFP.</b>	<b>3</b>	
To what extent did the Proposer demonstrate the tangible results that it expects to achieve? <b>Assign 1 point or 0 points if the Proposer restates or paraphrases information in the RFP.</b>	<b>3</b>	
To what extent did the Proposer express a sincere commitment to perform this work in an efficient and timely manner?	<b>3</b>	
To what extent did the Proposer demonstrate that it can effectively integrate this project into its current obligations and existing workload?	<b>3</b>	
To what extent did the Proposer adequately explain why it should be chosen to undertake this project at this time?	<b>3</b>	
<b>Executive Summary Score</b>	<b>_____ Points earned X 1.0 = _____</b>	

**2. Agency Capability**

<b>Agency Capability Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
Upon reviewing the Proposer’s description of its business history, to what extent are the Proposing firm’s goals and history relevant, closely related, and complement this project?	<b>3</b>	
Upon reviewing the Proposer’s description of its business history, to what extent has the organization demonstrated a commitment to domestic violence prevention issues?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in the provision of statewide training and technical assistance on domestic violence prevention to diverse audiences in California?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in developing, implementing, and evaluating training curricula and collateral materials?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in designing, developing, and producing camera-ready media and educational materials?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in designing, planning and coordinating statewide meetings and conferences?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in collaborating and partnering with varied organizations and diverse constituencies to build capacity on domestic violence prevention in California?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in developing and implementing a comprehensive evaluation plan?	<b>3</b>	

<b>Agency Capability Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in conducting needs and resource assessment activities, including key informant interviews and surveys, to determine the training needs of particular populations?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in communicating and disseminating information and materials to various audiences statewide through teleconferences, listserves, web conferences, or other medium of communication?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess sufficient experience in performing administrative functions such as entering into subcontracts with other agencies, and reimbursing individuals for travel per diem and costs?	<b>3</b>	
From the experience described in its proposal, to what extent does the Proposer possess experience in domestic violence primary prevention strategies, projects or programs?	<b>3</b>	
Based on a review of the Proposer's information about its prior accounts or work projects in the past five years, to what extent did the Proposer demonstrate that it has performed services that were similar in nature or closely related to the RFP Scope of Work?	<b>3</b>	
To what extent did the Proposer demonstrate that it has had experience establishing and maintaining effective working relationships with government entities, state organizations, local community based organizations, and private nonprofit organizations?	<b>3</b>	
<b>Agency Capability Score</b>	<b>_____ Points earned X 2.0 =</b>	<b>_____</b>

### 3. Work Plan

<b>Work Plan Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent are the Proposer's overall approaches and/or methods comprehensive and/or technically sound?	<b>3</b>	
To what extent did the Proposer offer a rationale basis for choosing its particular approaches and methods (i.e., proven success or past effectiveness)?	<b>3</b>	
To what extent are the proposed procedures, methods and approaches appropriate and reasonable (i.e., if implemented are they likely to produce the desired results)?	<b>3</b>	
To what extent did the Proposer include all required sections and content of the Work Plan in relation to the Scope of Work requirements, and in the sequence requested?	<b>3</b>	
To what extent are the proposed objectives quantified and measurable objectives related to achieving the Scope of Work?	<b>3</b>	
To what extent does the Proposer describe in detail the specific actions (i.e., tasks/activities and functions) that the Proposer will perform to achieve each objective and fulfill all Scope of Work requirements?	<b>3</b>	
To what extent will the Proposer perform the tasks/activities and functions in a logical order?	<b>3</b>	
To what extent are the proposed performance time lines realistic and achievable?	<b>3</b>	

<b>Work Plan Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent did the Proposer indicate who will have primary responsibility for performing each major task/activity?	<b>3</b>	
To what extent did the Proposer adequately demonstrate how it will measure and/or prove the completion of major tasks, functions, or activities (i.e., identification of key events/outcomes or deliverables)?	<b>3</b>	
To what extent did the Proposer provide a well-developed, organized, clear Work Plan that demonstrates the Proposer's ability to implement this project?	<b>3</b>	
<b>Work Plan Score</b>		_____ <b>Points earned X 2.0 =</b> _____

**4. Management Plan**

<b>Management Plan Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent has the Proposer demonstrated its capability to effectively coordinate, manage, and monitor the efforts of assigned staff (including subcontractors and consultants) to ensure that work is effectively completed and timely?	<b>3</b>	
Upon reviewing the Proposer's description of its fiscal accounting processes and budgetary controls, to what extent are the fiscal processes and controls adequate to ensure the responsible use and management of contract funds and accurate invoicing?	<b>3</b>	
Upon reviewing the Proposer's description of its fiscal accounting processes and budgetary controls, to what extent can the Proposer properly account for state project costs to ensure that only appropriate costs are billed to CDPH?	<b>3</b>	
Upon reviewing the Proposer's description of its fiscal accounting processes and budgetary controls, to what extent are the Proposer's fiscal reporting and monitoring capabilities adequate to ensure contract funds are managed responsibly?	<b>3</b>	
Upon reviewing the Proposer's description of its fiscal accounting processes and budgetary controls, to what extent has the Proposer demonstrated that it will maintain appropriate documentation to prove, support, or substantiate the expenses invoiced to CDPH?	<b>3</b>	
Upon reviewing the Proposer's organization chart in the Appendix Section, to what extent is the Proposer's organizational structure sound with distinct lines of authority and reporting relationships between management and all staff including subcontractors and independent consultants?	<b>3</b>	
Upon reviewing the Proposer's financial statements in the Appendix Section, to what extent is the Proposer financially stable and sound?	<b>3</b>	
<b>Management Plan Score</b>		_____ <b>Points earned X 1.0 =</b> _____

**5. Project Personnel**

<b>Project Personnel Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>

<b>Project Personnel Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
Upon reviewing the Proposer’s staffing plan, to what extent has the Proposer allocated an appropriate number of staff in the appropriate position levels or classifications to perform the full range of services?	<b>3</b>	
Upon reviewing the Proposer’s staffing plan, to what extent has the Proposer allocated appropriate FTEs or percentages of staff time for each position or classification?	<b>3</b>	
Upon reviewing the proposed salary rates or ranges and proposed duties for the proposed personnel, to what extent are the salary rates or ranges appropriate in relation to the assigned duties and level of responsibility?	<b>3</b>	
Upon reviewing the proposed job descriptions or duty statements for the proposed personnel, to what extent has the Proposer appropriately assigned the job responsibilities and tasks among the different personnel?	<b>3</b>	
Upon reviewing the proposed job descriptions or duty statements for the proposed personnel (including subcontractors and independent consultants), to what extent has the Proposer appropriately divided the work between its in-house resources and proposed subcontractors (including independent consultants)?  <b>If no subcontracting or use of consultants is proposed, up to 3 points will be assigned based on the effectiveness of the Proposer’s allocation of tasks to its in-house personnel.</b>	<b>3</b>	
Upon reviewing the job descriptions and resumes of the proposed staff <i>[excluding the project director(s)/administrator(s) or project coordinator(s)]</i> , to what extent do the proposed personnel possess the qualifications and expertise needed to perform the assigned duties?	<b>3</b>	
Upon reviewing the job descriptions and resumes of the proposed project director(s)/administrator(s) or project coordinator(s), to what extent do the proposed personnel possess the qualifications, past experience and expertise needed to carry out their assigned responsibilities?	<b>3</b>	
Upon reviewing the Proposer’s administrative policies and procedures, to what extent will the policies/procedures lead to the recruitment and selection of qualified, competent and experienced staff, subcontractors and/or independent consultants for this project?	<b>3</b>	
<b>Project Personnel Score</b>	_____ <b>Points earned X 1.5 =</b>	_____

**6. Facilities and Resources**

<b>Facilities and Resources Rating Factors</b>	<b>Points Possible</b>	<b>Points Earned</b>
To what extent does the Proposer have access to office facilities that are sufficient to enable performance of the scope of work?	<b>3</b>	
To what extent does the Proposer have access to adequate support services and other resources that are needed to ensure successful performance?	<b>3</b>	
<b>Facilities and Resources Score</b>	_____ <b>Points earned X 1.5 =</b>	_____

**N. Bid Requirements and Information**

## 1. Nonresponsive proposals

In addition to any condition previously indicated in this RFP, the following occurrences **may** cause CDPH to deem a proposal nonresponsive.

- a. Failure of a Proposer to:
  - 1) Meet DVBE participation goals or to demonstrate that a substantial Good Faith Effort (GFE) was made to meet those goals.
  - 2) Meet proposal format/content or submission requirements including, but not limited to, the sealing, labeling, packaging and/or timely and proper delivery of proposals.
  - 3) Pass the Required Attachment / Certification Checklist review (i.e., by not marking "Yes" to applicable items or by not appropriately justifying, to CDPH's satisfaction, all "N/A" designations).
  - 4) Submit a **mandatory** Non-Binding Letter of Intent in the manner required, if applicable.
- b. If a Proposer submits a proposal that is conditional, materially incomplete or contains material defects, alterations or irregularities of any kind.
- c. If a Proposer supplies false, inaccurate or misleading information or falsely certifies compliance on any RFP attachment.
- d. If CDPH discovers, at any stage of the bid process or upon contract award, that the Proposer is unwilling or unable to comply with the contract terms, conditions and exhibits cited in this RFP or the resulting contract.
- e. If other irregularities occur in a proposal response that is not specifically addressed herein (i.e., the Proposer places any conditions on performance of the scope of work, submits a counter proposal, etc.).

## 2. Proposal modifications after submission

- a. All proposals are to be complete when submitted. However, an entire proposal may be withdrawn and the Proposer may resubmit a new proposal.
- b. To withdraw and/or resubmit a new proposal, follow the instructions appearing in the RFP section entitled, "Withdrawal and/or Resubmission of Proposals".

## 3. Proposal mistakes

If prior to contract award, award confirmation, or contract signing, a Proposer discovers a mistake in their proposal and/or cost offering that renders the Proposer unable or unwilling to perform all scope of work services as described in its proposal response for the price/costs offered, the Proposer must immediately notify CDPH and submit a written request to withdraw its proposal following the procedures set forth in Section O, Paragraph 4b.

## 4. Withdrawal and/or Resubmission of Proposals

- a. Withdrawal deadlines

A Proposer may withdraw a proposal at any time before the proposal submission deadline.

b. Submitting a withdrawal request

- 1) Submit a written withdrawal request, signed by an authorized representative of the Proposer.
- 2) Label and submit the withdrawal request using one of the following methods.

U.S. Mail, Hand Delivery or Overnight Express:	Fax:
<b>Withdrawal RFP 08-85191</b> California Department of Public Health Contract Management Unit Mail Station 1802 1501 Capitol Avenue, Suite 71.5178 P.O. Box 997377 Sacramento, CA 95899-7377	<b>Withdrawal RFP 08-85191</b> California Department of Public Health Contract Management Unit  <b>Fax: (916) 650-0110</b>

- 3) **[For faxed withdrawal requests]** Proposers must call CDPH’s CMU at (916) 650-0100 to confirm receipt of a faxed withdrawal request. Follow-up the faxed request by mailing or delivering the signed original withdrawal request within 24 hours after submitting a faxed request.

An originally signed withdrawal request is generally required before CDPH will return a proposal to a Proposer. CDPH may grant an exception if the Proposer informs CDPH that a new or replacement proposal will immediately follow the withdrawal.

c. Resubmitting a proposal

After withdrawing a proposal, Proposers may resubmit a new proposal according to the proposal submission instructions. Replacement proposals must be received at the stated place of delivery by the proposal due date and time.

**5. Contract award and protests**

a. Contract award

- 1) Award of the contract, if awarded, will be to the responsive and responsible Proposer, who earns the highest total score. The highest scored proposal will be determined after CDPH adjusts Proposer scores for applicable bidder preferences.
- 2) CDPH shall award the contract only after CDPH posts a Notice of Intent to Award for five (5) working days. CDPH expects to post the Notice of Intent to Award before the close of business on the date and time stated in the section entitled, “Time Schedule” in a Contract Award Notices Binder which will be available for viewing by the public during normal business hours, at the following location:

California Department of Public Health  
 Contract Management Unit  
 1501 Capitol Avenue, First Floor Guard Station  
 Sacramento, CA 95814

- 3) CDPH will mail, email, or fax a written notification and/or a copy of the Notice of Intent to Award to all firms that submitted a proposal.
- 4) CDPH will confirm the contract award to the winning Proposer after the protest deadline, if no protests are filed or following the Department of General Service's resolution of all protests. CDPH staff may confirm an award verbally or in writing.

b. Settlement of ties

- 1) In the event of a precise total high score tie between a responsive proposal submitted by a certified small business or microbusiness and a responsive proposal submitted by a certified DVBE that is also a certified small business, the contract will be awarded to the DVBE firm per Government Code Section 14838(f) et seq.
- 2) In the event of a precise total high score tie between a responsive proposal submitted by a firm that was granted non-small business subcontractor preference and a responsive proposal submitted by a certified small business or microbusiness, the contract will be awarded to the certified small business or microbusiness.
- 3) In the event of a precise total high score between a responsive proposal submitted by a nonprofit veteran service agency (NVSA) that is a certified small business and a responsive proposal submitted by a certified DVBE that is also a certified small business, the contract will be awarded to the certified DVBE.
- 4) In the absence of a California law or regulation governing a specific tie, CDPH will settle all other precise total high score ties by making an award to the Proposer who earns the highest narrative or Technical Proposal score. If narrative or Technical Proposal scores are also tied, CDPH will settle the tie in a manner that CDPH determines to be fair and equitable (e.g., coin toss, lot drawing, etc.). In no event will CDPH settle a tie by dividing the work among the tied Proposers.

c. Protests

1) Who can protest

Any Proposer who submits a proposal may file protest if the Proposer believes its proposal is responsive to all RFP requirements.

2) Grounds for protests

Protests are limited to the grounds described in Public Contract Code (PCC) Section 10345. CDPH will not make an award until all protests are withdrawn by the protestant, denied, or resolved to the satisfaction of the Department of General Services (DGS).

3) Protest time lines

- a. If an eligible Proposer wishes to protest the intended contract award, the Proposer must file a "Notice of Intent to Protest" with both CDPH and the Department of General Services within five working days after CDPH posts the Notice of Intent to Award. The Notice of Intent to Protest may be quite brief. Any Notice of Intent to Protest filed more than five working days after CDPH posts the Notice of Intent to Award shall be untimely.

- b. Within five calendar days after filing a “Notice of Intent to Protest”, the protestant must file with both CDPH and the Department of General Services a full and complete written protest statement identifying the specific grounds for the protest. The statement must contain, in detail, the reasons, law, rule, regulation, or practice that the protestant believes CDPH has improperly applied in awarding the contract.

4) Submitting a protest

Protests must be filed with both the Department of General Services and the California Department of Public Health. Proposers may hand deliver, mail or fax a protest.

Label, address, and submit the initial protest notice and detailed protest statement using one of the following methods.

U.S. Mail, Hand Delivery or Overnight Express:	Fax:
<p><b>Protest to CDPH RFP 08-85191</b>                      California Department of Public Health                      Contract Management Unit                      Mail Station 1802                      P.O. Box 997377                      1501 Capitol Avenue, Suite 71.5178                      Sacramento, CA 95899-7377</p>	<p><b>Protest to CDPH RFP 08-85191</b>                      California Department of Public Health                      Contract Management Unit    <b>Fax:</b> (916) 650-0110</p>
<p><b>Protest to CDPH RFP 08-85191</b>                      Dept. of General Services                      Office of Legal Services                      Attention: Protest Coordinator                      707 Third Street, 7<sup>th</sup> Floor, Suite 7-330                      P.O. Box 989052                      West Sacramento, CA 95798-9052</p>	<p><b>Protest to CDPH RFP 08-85191</b>                      Dept. of General Services                      Office of Legal Services    <b>Fax:</b> (916) 376-5088</p>

**For faxed protests**

Faxed protests must be followed-up by sending an original signed protest, with all supporting material, within one (1) calendar week of submitting the faxed protest.

Call the telephone numbers below to confirm receipt of a fax transmission:

Department of General Services	(916) 376-5080
California Department of Public Health	(916) 650-0100

**6. Disposition of proposals**

- a. All materials submitted in response to this RFP will become the property of the California Department of Public Health and, as such, are subject to the Public Records Act (GC Section 6250, et seq.). CDPH will disregard any language purporting to render all or portions of any proposal confidential.
- b. Upon posting of a Notice of Intent to Award, all documents submitted in response to this RFP and all documents used in the selection process (e.g., review checklists, scoring sheets, letters of intent, etc.) will be regarded as public records under the California

Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public. However, proposal contents, Proposer correspondence, selection working papers, or any other medium shall be held in the strictest confidence until the Notice of Intent to award is posted.

- c. CDPH may return a proposal to a Proposer at their request and expense after CDPH concludes the bid process.

## 7. Inspecting or obtaining copies of proposals

- a. Who can inspect or copy proposal materials

Any person or member of the public can inspect or obtain copies of any proposal materials.

- b. What can be inspected / copied and when

- 1) On or after the date CDPH posts the Notice of Intent to Award, all proposals, Proposers Lists, RFP download lists, conference sign-in/attendance sheet, letters of intent, checklists and/or scoring/evaluation sheets become public records. These records shall be available for review, inspection and copying during normal business hours.

- c. Inspecting or obtaining copies of proposal materials

Persons wishing to view or inspect any proposal or award related materials must identify the items they wish to inspect and must make an inspection appointment by contacting **Pam Shipley** at **(916) 552-9839**.

Persons wishing to obtain copies of proposal materials may visit CDPH or mail a written request to the CDPH office identified below. The requestor must identify the items they wish to have copied. Materials will not be released from State premises for the purposes of making copies.

Unless waived by CDPH, a check covering copying and/or mailing costs must accompany the request. Copying costs, when applicable, are charged at a rate of **ten cents** per page. CDPH will fulfill all copy requests as promptly as possible. Submit copy requests as follows:

### **Request for Copies - RFP 08-85191**

Claudia Angel  
California Department of Public Health  
EPIC Branch  
MS Code 7214  
1616 Capitol Avenue, Suite 74.660, P.O. Box 997377  
Sacramento, CA 95899-7377

## 8. Verification of Proposer information

By submitting a proposal, Proposers agree to authorize CDPH to:

- a. Verify any and all claims made by the Proposer including, but not limited to verification of prior experience and the possession of other qualification requirements, and

- b. Check any reference identified by a Proposer or other resources known by the State to confirm the Proposer's business integrity and history of providing effective, efficient and timely services.

## 9. CDPH rights

In addition to the rights discussed elsewhere in this RFP, CDPH reserves the following rights.

### a. RFP corrections

- 1) CDPH reserves the right to do any of the following up to the proposal submission deadline:
  - a) Modify any date or deadline appearing in this RFP or the RFP Time Schedule.
  - b) Issue clarification notices, addenda, alternate RFP instructions, forms, etc.
  - c) Waive any RFP requirement or instruction for all Proposers if CDPH determines that the requirement or instruction was unnecessary, erroneous or unreasonable.
  - d) Allow Proposers to submit questions about any RFP change, correction or addenda. If CDPH allows such questions, specific instructions will appear in the cover letter accompanying the document.
- 2) If deemed necessary by CDPH to remedy an RFP error or defect that is not detected in a timely manner, CDPH may also issue correction notices or waive any unnecessary, erroneous, or unreasonable RFP requirement or instruction after the proposal submission deadline.
- 3) **Use of a Mandatory Non-Binding Letter of Intent**

To reduce State costs of mailing procurement corrections to persons and entities that do not intend to bid, CDPH will mail, email, or fax written clarification notices and/or RFP addenda only to those persons and entities that submit a timely mandatory Non-Binding Letter of Intent.

If CDPH decides, just before or on the proposal due date, to extend the submission deadline, CDPH may choose to notify persons or entities who submitted a timely mandatory Non-Binding Letter of Intent of the extension by fax, email, or by telephone. CDPH will follow-up any verbal notice in writing by fax, email, or by mail.

### b. Collecting information from Proposers

- 1) If deemed necessary, CDPH may request a Proposer to submit additional documentation during or after the proposal review and evaluation process. CDPH will advise the Proposers orally, by fax, email, or in writing of the documentation that is required and the time line for submitting the documentation. CDPH will follow-up oral instructions in writing by fax, email, or mail. Failure to submit the required documentation by the date and time indicated may cause CDPH to deem a proposal nonresponsive.
- 2) CDPH, at its sole discretion, reserves the right to collect, by mail, email, fax or other method; the following omitted documentation and/or additional information.

- a) Signed copies of any form submitted without a signature.
  - b) Data or documentation omitted from any submitted RFP attachment/form.
  - c) Information/material needed to clarify or confirm certifications or claims made by a Proposer.
  - d) Information/material or form needed to correct or remedy an immaterial defect in a proposal.
- 3) The collection of Proposer documentation may cause CDPH to extend the date for posting the Notice of Intent to Award. If CDPH changes the posting date, CDPH will advise the Proposers, orally, via email, or in writing, of the alternate posting date.
- c. Immaterial proposal defects
- 1) CDPH may waive any immaterial defect in any proposal and allow the Proposer to remedy those defects. CDPH reserves the right to use its best judgment to determine what constitutes an immaterial deviation or defect.
  - 2) CDPH's waiver of an immaterial defect in a proposal shall in no way modify this RFP or excuse a Proposer from full compliance with all bid requirements.
- d. Correction of clerical or mathematical errors
- 1) CDPH reserves the right, at its sole discretion, to overlook, correct or require a Proposer to remedy any obvious clerical or mathematical errors occurring in the narrative portion of a proposal, on a Cost Proposal form or on a Budget Detail Work Sheet.
  - 2) If the correction of an error results in an increase or decrease in the total price, CDPH shall give the Proposer the option to accept the corrected price or withdraw their proposal.
  - 3) Proposers may be required to initial corrections to costs and dollar figures on the Cost Proposal form or a Budget Detail Work Sheet if the correction results in an alteration of the annual costs or total cost offered.
  - 4) If a mathematical error occurs in a total or extended price and a unit price is present, CDPH will use the unit price to settle the discrepancy.
- e. Right to remedy errors
- CDPH reserves the right to remedy errors caused by:
- 1) CDPH office equipment malfunctions or negligence by agency staff,
  - 2) Natural disasters (i.e., floods, fires, earthquakes, etc.).
- f. No contract award or RFP cancellation
- The issuance of this RFP does not constitute a commitment by CDPH to award a contract. CDPH reserves the right to reject all proposals and to cancel this RFP if it is in the best interests of CDPH to do so.
- g. Contract amendments after award

As provided in the Public Contract Code governing contracts awarded by competitive bid, the CDPH reserves the right to amend the contract after CDPH makes a contract award.

h. Proposed use of subcontractors and/or independent consultants

Specific subcontract relationships proposed in response to this RFP (i.e., identification of pre-identified subcontractors and independent consultants) shall not be changed during the procurement process or prior to contract execution. The pre-identification of a subcontractor or independent consultant does not affect CDPH's right to approve personnel or staffing selections or changes made after the contract award.

i. Staffing changes after contract award

CDPH reserves the right to approve or disapprove changes in key personnel that occur after CDPH awards the contract.

**O. Bidding Certification Clauses**

**1. Certificate of Independent Price Determination**

a. The prospective Proposer certifies that:

- 1) The prices in this bid or proposal have been arrived at independently without any consultation, communication or agreement with any other Proposer, Proposer or competitor for the purpose of restricting competition relating to:
  - a) The prices or costs offered,
  - b) The intention to submit a bid or proposal,
  - c) The methods or factors used to calculate the costs or prices offered.
- 2) The prices in this bid or proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before the bid/cost proposal opening date or date of contract award posting, unless otherwise required by law.
- 3) No attempt has been made or will be made by the Proposer to induce any other firm or entity to submit or not to submit a bid or proposal for the purpose of restricting competition.

b. Each signature appearing on the documents contained in this bid package/proposal is considered to be a certification by the signatory that the signatory:

Is the person in the Proposer's organization that is either responsible for determining the prices offered in this bid or proposal and/or is designated to complete the bid or proposal forms on behalf of the bidding firm, and the signatory has not participated and will not participate in any action contrary to all subsections of paragraph a.

**P. Preference Programs**

To confirm the identity of the highest scored responsive Proposer, CDPH will adjust the total point score for applicable claimed preference(s). Bidding preferences shall not be applied to proposals that fail to pass the Checklist Review or fail to earn a minimum passing score during the narrative proposal scoring process. CDPH will apply preference adjustments to eligible

Proposers according to State regulations following on-line or personal verification of eligibility with the appropriate office of the Department of General Services.

## 1. Small Business / Microbusiness Preference

- a. A responsive California small business or microbusiness Proposer claiming preference and verified as a certified small business or microbusiness in a relevant business category or type will be granted a preference of five percent (5%) of the total point score earned by the responsive/responsible Proposer with highest combined score, if the highest scored proposal is submitted by a non-small business. Non-small business means a responsive/responsible Proposer that is not certified by the California Department of General Services as a California small business or microbusiness in a relevant business category or type. The "service" category or business type will most likely apply to this procurement. Nonprofit Veteran Service Agencies (NVSA) are to view the instructions in provision 3 of this section (Preference Programs).
- b. To be certified as a California small business or microbusiness and eligible for a bidding preference the business concern must meet the State's eligibility requirements and must have submitted an application for small business status no later than 5:00 p.m. on the proposal submission deadline.
- c. Firms desiring small business or microbusiness certification must obtain the appropriate Small Business Certification Application (STD 812 or other form) from the appropriate office of the Department of General Services, fully complete the application, and submit it to the Department of General Services as instructed in the application. Prospective proposing firms desiring small business certification assistance, may contact the Department of General Services by the following means:
  - 1) (916) 322-5060 (24 hour recording and mail requests), or
  - 2) (916) 375-4940 (Small business assistance) or (800) 559-5529 (live operator Central receptionist), or
  - 3) Internet address: <http://www.pd.dgs.ca.gov/smbus/default.htm> or
  - 4) Fax: (916) 375-4950, or
  - 5) Email: [osdchelp@dgs.ca.gov](mailto:osdchelp@dgs.ca.gov)

## 2. Non-Small Business Subcontractor Preference

- a. Non-small business means a responsive/responsible Proposer that is not certified by the California Department of General Services as a small business or microbusiness.
- b. If the responsive Proposer earning the highest total score is not a certified small business/microbusiness, a bid preference up to five percent (5%) is available to a responsive non-small business Proposer committing twenty-five percent (25%) small business subcontractor use of one or more small businesses. When applicable, the preference points will be calculated pursuant to the regulations in Title 2, California Code of Regulations (CCR) § 1896.8 and will be added to total score of an eligible non-small business. This preference is authorized pursuant to Title 2, CCR § 1896.2 and Government Code § 14835.
- c. If a Proposer claims the non-small business subcontractor preference, the proposal response must identify each proposed small business subcontractor that will be used, the participation percentage and dollar amount committed to each identified small business subcontractor, and substantial proof to enable verification of each subcontractor's small business status. The total small business subcontractor use must equal no less than twenty-five percent (25%) of the total cost offered.

- d. To be granted preference, each proposed small business subcontractor must possess an active small business certification issued by the Department of General services, must perform a “commercially useful function” under the contract and the basic functions to be performed must be identified at the time of proposal submission.
- e. Complete **Attachment 10a (Non-Small Business Subcontractor Preference Request) and Attachment 10b (Small Business Subcontractor/Supplier Acknowledgement)** to request the non-small business subcontractor preference.
- f. Refer to the RFP section entitled, “Settlement of ties” to learn how tied costs will be resolved.

**3. DVBE Bid Incentive**

In accordance with Section 999.5(a) of the Military and Veterans code an incentive will be given to bidders who provide DVBE participation. For evaluation purposes only, CDPH shall apply an incentive to bids that propose California-Certified DVBE participation as identified on page 5 of Attachment 9a, CDPH 2349, Actual DVBE Participation form, and confirmed by CDPH. The incentive amount for awards based on low price will vary in conjunction with the percentage of DVBE participation. Unless a table that replaces the one below has been expressly established elsewhere with this solicitation, the following percentages will apply for awards based highest score.

Confirmed DVBE Participation of:	Calculation:
Over 3%	5% x 800 = 40
3%	4% x 800 = 36
2% up to 3%	2% x 800 = 16

Awards **based on highest score** – the solicitation shall include an individual requirement that identifies incentive points for DVBE participation.

**4. Nonprofit Veteran Service Agency (NVSA) Small Business Preference**

- a. Pursuant to Military and Veteran Code Section 999.50 et seq., responsive/responsible nonprofit veteran service agencies (NVSAs) claiming small business/microbusiness preference and verified as such in the relevant category or business type prior to the proposal submission due date will be granted a preference up to five percent (5%) of the highest score, if the highest scored responsive proposal is submitted by a Proposer not certified as a small business/microbusiness. The “service” category is the business type that will most likely apply to this procurement.
- b. To be eligible for the NVSA small business preference, the business concern must:
  - 1) Request small business preference at the time of proposal submission, and
  - 2) Become certified as a small business by the appropriate office of the California Department of General Services (DGS) prior to the proposal submission due date.
- c. Refer to the RFP section entitled, “Settlement of ties” to learn how tied proposals will be resolved.

## 5. Target Area Contract Preference Act and Enterprise Zone Act

- a. Government Code (GC) Section 4530 (TACPA) and GC Section 7070 (EZA) provide that California based companies shall be granted a 5% preference whenever a state agency prepares a solicitation for **services** in excess of \$100,000. The preference(s) shall apply if the worksite is not fixed by the government agency and the Proposer can demonstrate and certify, under the penalty of perjury, that at least 90% of the total labor hours required to perform the services shall be performed at an identified worksite located in a distressed area (TACPA) or enterprise zone (EZA). TACPA/EZA preferences will only be applied if this procurement results in more than one responsive proposal receiving a passing narrative proposal score.
- b. Additional work force preferences ranging from 1% to 4% can be earned by eligible Proposers that agree to hire 5% to 20% of persons with a high risk of unemployment or those living in a targeted employment area or that are enterprise zone eligible to perform a specified percentage of the contract work.
- c. The granting of TACPA or EZA preference cannot displace an award to a certified small business.
- d. Proposers seeking TACPA and/or EZA preference must submit a completed STD 830 - Target Area Contract Preference Act Request (**Attachment 12**) or a STD 831 - Enterprise Zone Act (EZA) Preference Request (**Attachment 13**) with their proposal. The applicable preference request form must include the following:
  - 1) All appropriate certifications. (TACPA and EZA)
  - 2) The proposing firm's name and the name of all suppliers and subcontractors that will work with the Proposer to fulfill the terms of the contract along with the addresses of each of the worksite(s) and estimated labor hours. (TACPA and EZA)
  - 3) County census tract number and block group number. (TACPA)
  - 4) Enterprise zone name(s). (EZA)
  - 5) Proposer's original signature. (TACPA and EZA)
  - 6) A checkbox marked to identify the additional 1% to 4% preference sought for hiring persons with a high risk of unemployment. (TACPA and EZA)
- e. TACPA and/or EZA preference cannot be granted if:
  - 1) The lowest proposed cost does not equal or exceed \$100,000 for the entire term, **or**
  - 2) The work site or any part thereof is fixed or preset by the State, **or**
  - 3) The services involve construction or a public works project **or**
- f. A Proposer who has claimed a TACPA and/or EZA preference and is awarded the contract will be obligated to perform in accordance with the preference(s) requested, provided the preference was granted in obtaining the contract. Firms receiving preference must:
  - 1) Report their labor hours to the State and
  - 2) Reference the state contract on which the award is based for the specific reporting requirements.
- g. Proposers wishing to learn more about TACPA and/or EZA requirements, designated work site(s) or enterprise zones in California should contact the appropriate office of the Department of General Services at (916) 375-4940. DGS will attempt to determine TACPA and/or EZA eligibility within two working days.

## 6. Local Military Base Recovery Area (LAMBRA) Act Preference

- a. LAMBRA preference may be granted for this procurement if the lowest cost offered is \$100,000 or more; if no part of the worksite is fixed by CDPH, and the Proposer can demonstrate and certify, under the penalty of perjury, that 100% of the total labor hours required to perform the services shall be performed at an approved worksite located in a local military base recovery area. LAMBRA preference will only be applied if this procurement results in more than one responsive proposal receiving a passing Technical Proposal score.
- b. Proposers seeking to obtain a LAMBRA 5% preference must submit acquire and submit a completed STD 832 (Local Military Base Recovery Area Act for Goods and Services Solicitations) with their proposal response. The STD 832 may be accessed at this Internet site: <http://www.documents.dgs.ca.gov/osp/pdf/std832.pdf>.
- c. Proposers wishing to obtain more information about LAMBRA Preference should visit this website: <http://www.pd.dgs.ca.gov/edip/lambra.htm>.

## 7. Combined preferences

The maximum preference or score addition that any proposer may be granted for preference, non-small business subcontractor preference, DVBE Incentive, TACPA preference, EZA preference, or LAMBRA preference combined is 15%.

Any firm that claims and is granted non-small business subcontractor preference, DVBE Incentive, TACPA preference, EZA preference, and/or LAMBRA preference cannot displace an award to a certified small business or microbusiness.

## Q. Contract Terms and Conditions

The winning Proposer must enter a written contract that may contain portions of the Proposer's proposal (i.e., Budget Detail Work Sheets, Work Plan), Scope of Work, standard contract provisions, the contract form, and the exhibits identified below. Other exhibits, not identified herein, may also appear in the resulting contract.

The exhibits identified in this section contain contract terms that require strict adherence to various laws and contracting policies. A Proposer's unwillingness or inability to agree to the proposed terms and conditions shown below or contained in any exhibit identified in this RFP may cause CDPH to deem a Proposer non-responsible and ineligible for an award. CDPH reserves the right to use the latest version of any form or exhibit listed below in the resulting agreement if a newer version is available.

The exhibits identified below illustrate many of the terms and conditions that may appear in the final agreement between CDPH and the winning Proposer. Other terms and conditions, not specified in the exhibits identified below, may also appear in the resulting agreement. Some terms and conditions are conditional and may only appear in an agreement if certain conditions exist (i.e., contract total exceeds a certain amount, federal funding is used, etc.).

In general, CDPH will not accept alterations to the General Terms and Conditions (GTC), CDPH's Special Terms and Conditions, the Scope of Work, other exhibit terms/conditions, or alternate language that is proposed or submitted by a prospective contractor. CDPH may consider a proposal containing such provisions "a counter proposal" and CDPH may reject such a proposal as nonresponsive.

**1. Sample contract forms / exhibits**

<b>Exhibit Label</b>	<b>Exhibit Name</b>
a. Exhibit A1	Standard Agreement
b. Exhibit A	Scope of Work
c. Exhibit B	Budget Detail and Payment Provisions
d. Exhibit C - View on-line.	General Terms and Conditions (GTC 307). View or download this exhibit at this Internet site: <a href="http://www.ols.dgs.ca.gov/Standard+Language/default.htm">http://www.ols.dgs.ca.gov/Standard+Language/default.htm</a> .
e. Exhibit D(C)	Special Terms and Conditions
f. Exhibit E	Additional Provisions
g. Exhibit F	Contractor's Release
h. Exhibit G	Travel Reimbursement Information

**2. Unanticipated tasks**

In the event unanticipated or additional work must be performed that is not identified in this RFP, but in CDPH's opinion is necessary to successfully accomplish the scope of work, CDPH will initiate a contract amendment to add that work. All terms and conditions appearing in the final contract including the salary/wage rates, unit rates and/or other expenses appearing on the Proposer's Budget Detail Work Sheets will apply to any additional work.

**3. Resolution of language conflicts (RFP vs. final agreement)**

If an inconsistency or conflict arises between the terms and conditions appearing in the final agreement and the proposed terms and conditions appearing in this RFP, any inconsistency or conflict will be resolved by giving precedence to the final agreement.

# **RFP Attachments**