

REQUEST FOR PROPOSALS



Ohlone-Portolá Heritage Trail Feasibility Study

PKR – 2017- 003

San Mateo County Parks Department

Release Date: October 26, 2017

Responses must be received
by 5:00 p.m. Pacific Standard Time
on November 27, 2017

REQUEST FOR PROPOSALS

FOR

Ohlone-Portolá Heritage Trail Feasibility Study

Interested vendors must register online with San Mateo County at
www.publicpurchase.com

Proposals must be submitted electronically to
www.publicpurchase.com

By 5:00 p.m. Pacific Standard Time on November 27, 2017

PROPOSALS WILL NOT BE ACCEPTED AFTER THIS DATE AND TIME

Note regarding the Public Records Act:

Government Code Sections 6250 *et seq.*, the California Public Records Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Records Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request for Proposals is a public record in its entirety. Also, all information submitted in response to this Request for Proposals is itself a public record **without exception**. Submission of any materials in response to this Request for Proposals constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

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SECTION I – GENERAL INFORMATION

A. STATEMENT OF INTENT

As outlined in more detail in Section II – Scope of Work, this Request for Proposals (RFP) seeks a consultant to develop an Ohlone-Portolá Heritage Trail (O-PHT) Feasibility Study. The target start date and term for the proposed services is February 2018 to January 2019 subject to negotiation of a final agreement.

B. BACKGROUND

Archaeological research provides evidence that Native California Indians inhabited coastal San Mateo County and California as a whole for generations over 8,000 to 10,000 years prior to European settlement. Due to disease and other factors related to European colonization, no remaining Native Californian Indian tribes from the 10 known to have lived in the area of San Mateo County in the 1700s still remain. Through relationships with remaining descendants from the Raymatush tribe (from Pacifica), neighboring Amah Mutsun Tribal Band members, and research on the part of O-PHT Committee participants, the O-PHT seeks to build a better understanding of the context that Native California Indian tribes, collectively known today as the Ohlone, thrived at the time of the historic Portolá Expedition in 1769. The shaping of the next generations' understanding of history can include a clearer explanation that the network of Ohlone trade roads, food practices, and social traditions were of pivotal importance for the success of the Portolá Expedition in establishing a hold for the Spanish.

The Spanish government, fearing that the Russians would move down from Alaska to claim California in the 1760s, decided to preemptively create Spanish settlements in Alta (Upper) California. Gaspar de Portolá i Rovira (Portolá) (1716–1786), a Spanish soldier and administrator in Baja, Mexico (New Spain), volunteered to lead this expedition and establish military bases (presidios). With him was Father Serra, the Franciscan priest who would establish the mission settlements in Alta California. Though the Portolá Expedition later came to be known as the “Sacred Expedition”, the long-term ramifications for the existing Native California Indian population are part of history which must be told for future generations.

Portolá's Expedition (1769-1770) was the first recorded European land entry and exploration of the present-day state of California; this Expedition resulted in the founding of Spanish Alta California. With supply ships traveling by sea, Portolá explored by land from San Diego to San Francisco, naming many points along the way and founding the first two Spanish presidios (San Diego and Monterey). Significantly for European colonization, the Portolá Expedition was also the first European party to report seeing San Francisco Bay and recognize its importance for trade.

The Portolá Expedition was made up of 240 men, women, and children, and 1,000 mules, cattle, and horses. The Expedition traveled 1,200 miles from the current City of Velicata located in Baja, Mexico (New Spain) through nine California coastal counties to Pacifica, the Discovery Site overlooking San Francisco Bay, and eventually to the present location of Palo Alto before turning around and returning along a similar route. It is understood from journals of the Expedition that the party followed well-established, existing Native California Indian trade paths. The Expedition members' journals document the existence of Native California Indian villages spaced three to five miles apart along Native California Indian “roads” along the coast of California. In later years

these important Indian trade routes became State Highway 1, public roads, and sections of the California Coastal Trail.

At the time of the Portolá Expedition, over 300,000 Native California Indians lived in the State and approximately 1,400 were part of 10 tribes in the area which is now San Mateo County. The initial interactions between the Portolá Expedition and Ohlone tribes were very welcoming and beneficial to the Expedition members, many of whom had become seriously ill. The Ohlone healed the malnourished and failing members of the Portolá Expedition by feeding and sheltering them, and in addition led them from village to village as the Expedition explored coastal and bayside San Mateo County. In 2015, the San Mateo County Historical Association started a conversation about possible designation of the Gaspar de Portolá Expedition Route as a National Historic Trail as 90-miles of the historical route are located in San Mateo County. The 250th anniversary of the Expedition's arrival near the San Francisco Bay will occur in 2019. To recognize this pending anniversary, the San Mateo County Board of Supervisors authorized formation of a "Portolá Expedition Trail Committee" on August 4, 2015 (Resolution # 073986).

San Mateo County (SMC) Parks staff invited representatives from local, regional, state and federal agencies and nonprofit organizations to attend a series of meetings to discuss the Portolá Trail as: 1) a possible candidate for designation as a National Historic Trail; and 2) an alignment following the Portolá Expedition from the southern San Mateo County line near Año Nuevo to the Discovery Site east of the City of Pacifica; and 3) an alignment sharing 22 miles with the planned and partially completed 57.5-mile route of the California Coastal Trail (CCT).

The Committee recognized that a valuable opportunity exists to engage Native California Indian tribes in interpreting the Ohlone and Portolá Expedition stories based on their historic journals for future generations. To further develop the concept, SMC Parks applied for planning and technical assistance from the National Park Service Rivers, Trails, and Conservation Assistance Program (RTCA).

Using RTCA assistance (October 2016 – September 2017), the Committee worked to refine its focus to include both the story of the first European explorers to encounter San Francisco Bay and the story of the indigenous people who lived for generations on the land. The history of how the two cultures changed through the outcome of the Portolá Expedition is a vital part of the San Mateo County history story the Trail will interpret.

In May 2016, the Committee confirmed a new inclusive working name to reflect the revised project focus: the Ohlone-Portolá Heritage Trail Committee (O-PHT Committee). The following Project Description outlines the work to date of the O-PHT Committee to define a vision, goals, and scope of work for the near-term development of the O-PHT.

Vision, Goals, and Long-Term Potential

The Portolá Expedition began in the Baja California State of Mexico, traversed what are now nine California coastal counties from San Diego County to a final camp site near Palo Alto in Santa Clara County, and then returned back across San Mateo County to the coast and south again to Mexico. Sweeney Ridge in Pacifica is recorded as the

“Discovery Site” from which the first Spaniards saw the San Francisco Bay and claimed is as a strategic location for a fort to colonize California ahead of rivals like Russia.

The OPHT Committee drafted the following vision and goal statements to guide their work focusing on the feasibility of completing the O-PHT within San Mateo County:

Vision

The O-PHT in San Mateo County will be an approximately 90-mile interpretive and multi-use recreational trail and auto route that honors the region’s Native California Indians and commemorates the Portolá Expedition by taking the public back in time to understand and appreciate native history, culture, village sites and trails, and follow the footsteps of the first Spanish explorers to see the San Francisco Bay in 1769.

Goal 1

Develop an O-PHT Feasibility Study including an opportunities and constraints analysis for a proposed route for the trail through San Mateo County, which best balances historical accuracy with a feasible route supported by land managers and the public.

Goal 2

Portray the Native California Indian perspectives along the trail route through use of creative wayfinding signage, interpretation of assets, and storytelling with appeal for children, adults, visitors, and local communities, and consideration of safeguards for cultural resources.

Goal 3

Commemorate the 250th anniversary of the Portolá Expedition in November 2019 with coordinated public involvement, events, and educational opportunities along the trail route, and a strategy to promote the trail through media and branding.

Goal 4

Build momentum for the O-PHT with early implementation of signage for existing segments of both the recreational trail and auto routes, development of near-term trail segments that involve key partners such as a land trust or park agency, and events highlighting cultural resource assets such as the Sanchez Adobe Historic Site in Pacifica.

Goal 5

Develop a strategy to fund the planning, development, interpretation, and long-term operation and maintenance for the O-PHT, and support the completion of the California Coastal Trail through San Mateo County.

Goal 6 (Possible Future Project)

Investigate criteria and interest in pursuing designation as a National Historic Trail to commemorate the Portolá Expedition including requirements for a National Park Service

Feasibility Study and Congressional legislation as a future project. An effort to designation of the O-PHT in San Mateo County as part of a National Historic Trail would include outreach to the nine coastal counties from San Diego to San Mateo (some of which may be highlighting Portolá's route while advancing development of the 1,200-mile California Coastal Trail from Oregon to Mexico); and outreach to international partners including Portolá's birthplace in Balaguer Spain (City of Pacifica's Sister City) and the Expedition point of origin in Velicata, Baja California, Mexico.

Geographic Scope

The scope of the project is to identify the historic alignment of the Portolá Expedition within San Mateo County, and to help complete the California Coastal Trail. The proposed 90-mile route for the O-PHT begins at the southern San Mateo County border with Santa Cruz County near Año Nuevo State Park, heads north through historic Ohlone coastal villages and along native coastal trails to the City of Pacifica, then up and east over Sweeney Ridge to the site recorded as the point of Spanish discovery of the San Francisco Bay. The trail would then continue along the Portolá Expedition route through the Crystal Springs Watershed and terminate at the San Mateo County border with Santa Clara County.

The proposed trail alignment would include segments within four areas of Golden Gate National Recreation Area (Rancho Corral de Tierra, Milagra Ridge, Mori Point, and Sweeney Ridge) and would also cross Crystal Springs Watershed lands of the San Francisco Public Utilities Commission (SFPUC). The project would also seek to designate a route for the California Coastal Trail (CCT) through San Mateo County, of which approximately 22 miles would be coterminous with the O-PHT alignment.

Appendix A of this Request for Proposals contains an Overview Map of the proposed O-PHT in San Mateo County.

C. THE REQUEST FOR PROPOSAL PROCESS

This RFP seeks the submission of proposals to provide services from any and all interested and qualified proposers. The County of San Mateo seeks by way of this RFP to obtain the listed services in a manner that maximizes the quality of services while also maximizing value to the County and, by extension, the citizens of the County. Proposers must be able to show that they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type and local availability of the proposer's personnel and equipment resources.

SECTION II – SCOPE OF WORK

A. DESCRIPTION

Task 1: Define Work Plan and Project Schedule

- i. Draft a Work Plan table describing Ohlone-Portolá Heritage Trail Feasibility Study (“O-PHT Feasibility Study”) Project Tasks, deliverables, assigned staff, milestones, and timing for Project Schedule.
- ii. Hold one (1) Kick-off Meeting with San Mateo County Parks Project Manager (“Project Manager”) and Core Planning Committee to review draft O-PHT Feasibility Study Work Plan and Project Schedule.
- iii. Produce summary notes from Kick-off Meeting, refine draft Work Plan and Project Schedule, and submit a final O-PHT Feasibility Study Work Plan and Project Schedule for approval by the SMC Parks Project Manager.

Deliverables:

1. Notes from one (1) Kick-off Meeting with Project Manager and Core Planning Committee.
2. Final O-PHT Feasibility Study Work Plan and Project Schedule.

Task 2: Research, Analysis, and O-PHT Committee Group Interview

- i. Review Existing Information: Review all background materials gathered or developed by the O-PHT Committee; existing trail plans which include any portion of the proposed 90-mile trail corridor; existing trail design standards; and trail use designations for relevant jurisdictions along the proposed trail corridor. *Note: Detailed trail segment maps have been developed for the approximate alignment of the 90-mile trail route by the O-PHT Committee; these additional maps will be made available during contract negotiation with the selected applicant.*
- ii. Develop Vision, Goals and Planning Considerations Assessment based on research and background materials gathered.
- iii. Identify Opportunities and Constraints: Conduct a minimum of six (6) group interviews with County and partner entity representatives to assess proposed O-PHT trail segment opportunities and constraints for 1) public and private lands and 2) city, county, and state road rights-of-way.
- iv. Research trail route gaps, the need for parking (areas) to support visitor access to the trail, and potential for pedestrian crossing to be considered from parking area(s) to trail route, constraints in connectivity for 90-mile route, and opportunities to close gaps.
- v. Draft Opportunities and Constraints Analysis.
- vi. Review partner agencies’ current trail design standards, prepare a table to compare agencies’ adopted standards for hiking, equestrian, multi-purpose, and bike/auto route type facilities, and assess minimum requirements that would enable agencies to implement O-PHT segments within shared guidelines.
- vii. Research example “Braided Trail” design standards, and draft recommendations for the O-PHT (ex. Tahoe Rim Trail or Chain of Lakes Minnesota).

Deliverables:

1. Summary notes from six (6) group interviews with O-PHT Committee.
2. Draft Vision, Goals, and Considerations Assessment.

3. Draft Opportunities and Constraints Analysis.
4. Summary of Design Standards by trail type and agency.
5. Draft recommendations for developing a “Braided Trail” Design Standard.

Task 3: Recommendation Development

- i. Develop Draft Recommendations for Near-term Priorities. Prioritize trail segments into planning, design, or implementation phases in 3-5 years. Identify existing and potential parking area(s) along the trail route that may support the visitor use of the OPH Trail, including potential crossing locations which may exist or need to be evaluated further. If there are existing parking areas that could be used in the near-term, include specific recommendations for working with the necessary landowners, agencies and jurisdictions. Propose signage locations along existing (open to public) trail segments with potential to be designated as multi-modal or hiking trail. Detail specific recommendations for implementing designation of a separate bike/auto route working with necessary agencies and jurisdictions.
- ii. Develop Probable Cost Estimates for Near-term Priorities. Develop probable cost estimates for signage installation and other near-term priorities such as trail planning and fundraising.
- iii. Develop Draft Recommendations for Longer-term Strategies. Prioritize trail segments into planning, design, or implementation phases in 5+ years. Detail specific recommendations about phases, funding, stewardship, and next steps for National Historic Trail Designation. Produce probable cost estimates for longer-term issues such as operations and maintenance, cross-jurisdictional coordination, and National Historic Trail designation.
- iv. Hold a minimum of two (2) meetings with Project Manager and Core Planning Committee to present Draft Recommendations and report back on refined Draft Recommendations.

Deliverables:

1. Summary notes from two (2) Core Planning Committee Meetings.
2. Draft Recommendations for Near-term Priorities.
3. Probable Cost Estimates for Near-term Priorities.
4. Draft Recommendations for Longer-term Strategies.

Task 4: Draft Feasibility Study Report, Presentation and Materials, and Meetings on Draft O-PHT Feasibility Study Report

- i. Develop Draft O-PHT Feasibility Study including Vision, Goals, and Considerations Assessment; Opportunities and Constraints Analysis; Recommendations for Near-term Priorities; and Draft Recommendations for Longer-term Strategies.
- ii. Develop Draft Facilitators’ Agenda, Presentation, and Materials for one (1) O-PHT Committee Meeting to solicit input on the Draft Study analysis and priorities.

- iii. Develop a Draft Facilitators' Agenda, Presentation, and Materials for three (3) Community Meetings and secure OPHT Committee feedback on proposed messages.
- iv. Draft Online Outreach Survey and/or online input page using Presentation and Materials for Community Meetings.

Deliverables:

- 1. Draft Feasibility Study Report.
- 2. Presentation, Materials, and Facilitators' Agenda for one (1) O-PHT Committee Meeting on the Draft Report.
- 3. Draft Facilitators' Agenda for Community Meetings on the Draft Report.
- 4. Summary notes from one (1) O-PHT Meeting on Draft Report and Materials for Community Meetings and Online Outreach.

Task 5: Community Meetings and Online Outreach

- i. Hold one (1) Core Planning Committee Meeting to review feedback from O-PHT Committee and any changes suggested for the Community Meeting Facilitators' Agenda, Presentation, Materials, and Online Outreach.
- ii. Finalize Community Meeting Facilitators' Agenda, Presentation, and Materials to convey key messages from the Draft Feasibility Study for three (3) Community Meetings.
- iii. Hold three (3) Community Meetings on the draft O-PHT Feasibility Study to solicit feedback on analysis and priorities, working with Project Manager and Core Planning Committee.
- iv. Conduct Online Outreach and synthesize community input.

Deliverables:

- 1. Agenda for one (1) Core Planning Committee Meeting to review revisions to materials to be used for three (3) Community Meetings.
- 2. Final Presentation, Materials, and Facilitators' Agendas for three (3) Community Meetings on Draft Feasibility Study Report.
- 3. Final Online Outreach Materials.
- 4. Summary notes from three (3) Community Meetings on Draft Feasibility Study Report.
- 5. Summary of Online Outreach results.

Task 6: Final O-PHT Feasibility Study Report

- i. Hold one (1) Core Planning Committee Meeting to review input for Final O-PHT Feasibility Study Report.
- ii. Complete Final O-PHT Feasibility Study Report including Core Planning Committee feedback, Community Meeting input, and O-PHT Committee comments on Draft Report.

Deliverables:

1. Agenda for one (1) Core Planning Committee Meeting for final input.
2. Final OPHT Feasibility Study Report in electronic format and ten (10) printed copies.

B. PROJECT TIMELINE

The project timeline for completing the O-PHT Feasibility Study is twelve months (12 months) upon award of the contract, anticipated dates being February 2018 through January 2019. If proponents wish to identify an alternative timeline, please include a statement to that effect in your proposal with a revised project timeline.

C. RESPONSIBILITIES OF COUNTY PARKS

County Parks will provide:

- ii. A Project Manager.
- iii. Copies of all known existing maps, documents, design standards, and relevant plans.
- iv. Contact information for the OPHT Committee and other stakeholders.
- v. Coordination, noticing, and scheduling of all OPHT Committee meetings, community meetings, and meetings with County Board of Supervisors and Parks and Recreation Commission.
- vi. Coordination on Online Outreach and other interactive opportunities, as needed.
- vii. Coordination and participation for site visits, if applicable.

D. LENGTH OF AGREEMENT

The anticipated duration of the agreement is for 12 months, with the term tentatively beginning February 2018 and ending January 2019.

E. FUNDING

The San Mateo County Board of Supervisors authorized funding for the San Mateo County Parks Department to complete a Feasibility Study for the proposed O-PHT in San Mateo County.

F. ADDITIONAL REQUIREMENTS/CONSIDERATIONS

A public meeting will be held at the completion of this project as the Feasibility Study is approved and accepted. The consultant will be expected to attend, but not prepare a power point presentation.

Administrative Draft and Final Draft documents are expected to be reviewed prior to approval, and shall be provided in word, pdf, and 3 copies in written format.

SECTION III – GENERAL TERMS AND CONDITIONS

Read all Instructions. Read the entire RFP and all enclosures before preparing your proposal.

Proposal Costs. Costs for developing proposals are entirely the responsibility of the proposer and shall not be charged to the County or otherwise reimbursed by the County. Proposer must complete Enclosure 2: OPHT Fixed Pricing Form.

Proposal Becomes County Property. The RFP and all materials submitted in response to this RFP will become the property of the County.

Questions and Responses Process. Submit all questions relating to this RFP to the designated questions field associated with this RFP at publicpurchase.com.

All questions must be received no later than 5:00 p.m. on November 9, 2017.

All questions and responses will be posted to publicpurchase.com by November 16, 2017.

If changes to the RFP are warranted, they will be posted to the publicpurchase.com website. It is the responsibility of each proposer to check the website for changes and/or clarifications to the RFP prior to submitting a response. A proposer's failure to do so will not provide a ground for protest.

Alteration of Terms and Clarifications. No alteration or variation of the terms of this RFP is valid unless made or confirmed in writing by the County. Likewise, oral understandings or agreements not incorporated into the final contract are not binding on the County.

If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the proposer must immediately notify the County of such error in writing and request modification or clarification of the document. If a proposer fails to notify the County of an error in the RFP prior to the date fixed for submission, the proposer shall submit a response at his/her own risk, and if the proposer enters into a contract, the proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

Modifications or clarifications to the RFP will be posted to the publicpurchase.com website as outlined above without divulging the source of the request for same. The County may, at its discretion, also give electronic notice by email to all parties who have notified the County of their electronic contact information in response to this RFP, but no party that fails to receive email notice has any basis for protest given that all clarifications will be available online. It is the obligation of all proposing parties to check

the publicpurchase.com website for updates regarding the RFP if they wish to be kept advised of clarifications prior to submitting a proposal.

Selection of Provider(s). The selection of a provider will be memorialized in the form of a “County Agreement with Independent Contractor” (see the enclosed sample of the Standard Contract Template), authorized by a resolution of the County Board of Supervisors and signed by both parties.

The County reserves the right to reject any or all proposals without penalty. The County’s waiver of any deviation in the proposal shall in no way modify the RFP documents or excuse the proposer from full compliance with any eventual contract.

Once a provider is selected, the Agreement with that provider must still be negotiated and submitted to the San Mateo County Board of Supervisors for approval, and there is no contractual agreement between the selected provider unless and until the Board of Supervisors accepts and signs the Agreement. Selection of a proposal for negotiation of contract terms and eventual submission to County leadership by way of an Agreement does not constitute an offer, and proposers acknowledge by submission of a proposal that no agreement is final unless and until approved by the Board of Supervisors.

Equal Benefits. Contractor shall comply with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor’s employee is of the same or opposite sex as the employee.

Jury Duty. The contractor must comply with the County Ordinance requiring that the contractor have and adhere to a written policy that provides its full-time employees who live in San Mateo County with no fewer than five days of regular pay for actual jury service in San Mateo County. This policy may provide that employees deposit any fees received for such jury service with the contractor or that the contractor deduct from the employee’s regular pay the fees received for jury service. See Section 13, Compliance with County Employee Jury Service Ordinance, in the Standard Contract Template enclosure. If the proposer has no employees that qualify for jury duty in San Mateo County, the proposer may satisfy this requirement by providing the County with written confirmation of the fact that (1) it has no such employees and (2) it will comply with the jury service pay ordinance with respect to any future qualifying employees.

Living Wage. Unless subject to a specific exemption under the Ordinance, contractors providing services or goods with services must comply with Chapter 2.88 of the San Mateo County Ordinance Code, which is the County of San Mateo Living Wage Ordinance. Such compliance includes, but is not limited to, paying all Covered Employees the current Living Wage and providing notice to all Covered Employees and Subcontractors as required under the Ordinance. The Ordinance requires a specific

Living Wage be paid to employees working on certain contracts. Please see Chapter 2.88 of the San Mateo County Ordinance Code, a copy of which is attached to this RFP, to determine whether your contract is covered by the Ordinance or is exempt.

If the contract is exempt from the Ordinance OR if the proposer has no covered employees under the Ordinance, the proposer may satisfy this requirement by providing the County with written confirmation of the fact that (1) the contract is exempt from the Ordinance or it has no covered employees and (2) it will comply with the Ordinance with respect to any future qualifying employees.

Insurance. The County has certain insurance requirements that must be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the contractor must carry the statutory limit for workers' compensation insurance; if the contractor or its employees maintain a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and its officers, agents, employees, and servants as additional insured on any such policies (except workers compensation). Depending on the nature of the work being performed, additional requirements may need to be met.

Incomplete Proposals May be Rejected. If a proposer fails to satisfy any of the requirements identified in this RFP, the proposer may be considered non-responsive and the proposal may be rejected.

Contact With County Employees. As of the issuance date of this RFP and continuing until the final date for submission of proposals, all proposers are specifically directed not to hold meetings, conferences, or technical discussions with any County employee for purposes of responding to this RFP except as otherwise permitted by this RFP. Any proposer found to be acting in any way contrary to this directive may be disqualified from entering into any contract that may result from this RFP.

Proposers should submit questions or concerns about the process as stated above. The proposer should not otherwise ask any County employees questions about the RFP or related issues, either orally or by written communication, unless invited to do so.

Group Purchasing Organization Participation. Proposers should keep in mind that the County is a participant in more than one Group Purchasing Organization (GPO), and this RFP is open to those who provide services under a GPO. Proposers should ensure their proposals are as competitive as possible while also providing the highest quality services in order to be considered a viable provider for the listed services. The County reserves the right to use a GPO provider if doing so is in the County's best

interest, as determined solely by the County, even if that provider does not submit a proposal in response to this RFP.

Travel Costs. If the services requested will require you or your employees to travel to the Bay Area, and if the County opts to permit travel expenses to be reimbursed, there are some general guidelines regarding reimbursement rates that will apply. In general, the following restrictions should be kept in mind: reimbursement for the actual cost of lodging, meals, and incidental expenses (“LM&I Expenses”) is limited to the then-current Continental United States (“CONUS”) rate for the location of the work being done (San Mateo/Foster City/Belmont, California), as set forth in the Code of Federal Regulations and as listed by the website of the U.S. General Services Administration (available online by searching www.gsa.gov for the term ‘CONUS’); airline and car rental travel expenses (“Air & Car Expenses”) are limited to reasonable rates obtained through a cost-competitive travel service (for example, a travel or car-rental website), with air travel restricted to coach fares and car rental rates restricted to the mid-level size range or below; and certain other reasonable travel expenses (“Other Expenses”) such as taxi fares, parking costs, train or subway costs, etc. may be reimbursable on an actual-cost basis. You should not assume that the County will permit travel from the Bay Area to be reimbursed, and your proposal should include such travel costs if applicable. Travel costs should be minimized or eliminated in order for a proposal to be competitive.

Miscellaneous. This RFP is not a commitment or contract of any kind. The County reserves the right to pursue any and/or all ideas generated by this RFP. The County reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interest of the County. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, the County assumes no liability for any unintentional errors or omissions in this document. The County reserves the right to waive or modify any requirements of this RFP when it determines that doing so is in the best interest of the County. Finally, the County may revise or clarify aspects of the required services after proposals are submitted by communicating directly to some or all of the providers that submitted proposals.

SECTION IV – REQUEST FOR PROPOSALS PROCEDURE

This section describes the general RFP procedure used by the County, and the remaining sections of this RFP list detailed requirements.

A. TENTATIVE SCHEDULE OF EVENTS

EVENT	DATE
Release Request for Proposals	October 26, 2017
Questions Submitted to County Deadline	November 9, 2017

Release Responses to Questions	November 16, 2017
Proposal Deadline	November 27, 2017
Formal Review of Proposals ⁽¹⁾	November 27 - December 18, 2017
Notice of Intent to Recommend to Board of Supervisors	December 20, 2017
Protest Period Begins	December 20, 2017
Protest Period Ends	December 29, 2017
Contract Negotiations Begin ⁽¹⁾	December, 2017 – January 2018
Recommendation to Board of Supervisors ⁽¹⁾	January – February, 2018

(1) Dates are subject to change

B. SUBMISSION OF PROPOSALS

Provider/Service Provider Registration: Providers/service providers interested in responding to this RFP must register online with the County of San Mateo at www.publicpurchase.com. The County will not be held responsible or liable for registration errors.

Proposal: The RFP response will be submitted electronically to www.publicpurchase.com 5:00 p.m. Pacific Standard Time on November 27, 2017.

All responses must be received by the stated date and time in order to be considered for award. The County will not be responsible for and may not accept late proposals due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures) of the publicpurchase.com system.

By submitting a proposal, each proposer certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the proposer's capability of rendering the services to be provided. The failure of a proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of the County. The County reserves the sole right to evaluate the contents of proposals submitted in response to this RFP and to select a contractor, if any.

Proposals received late will not be opened or given any consideration for the proposed services unless doing so is deemed to be in the best interest of the County, as determined in the sole discretion of the County.

C. CONFIDENTIALITY OF PROPOSALS

California Government Code Sections 6250 et seq. (the “California Public Records Act” or the “Act”) defines a public record as any writing containing information relating to the conduct of the public business. The Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure. The materials submitted in response to this RFP are subject to the California Public Records Act.

Be advised that any contract that eventually arises from this RFP is a public record in its entirety. Also, all information submitted in response to this RFP is itself a public record without exception. Submission of any materials in response to this RFP constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

If the County receives a request for any portion of a document submitted in response to this RFP, the County will not assert any privileges that may exist on behalf of the person or entity submitting the proposal, and the County reserves the right to disclose the requested materials without notice to the party who originally submitted the requested material. To the extent consistent with the Public Records Act and applicable case law interpreting those provisions, the County and/or its officers, agents, and employees retain discretion to release or withhold any information submitted in response to this RFP.

Submission of a proposal constitutes a complete waiver of any claims whatsoever against the County and/or its officers, agents, or employees that the County has violated a proposer's right to privacy, disclosed trade secrets, or caused any damage by allowing the proposal to be inspected.

D. PROPOSAL EVALUATION

All proposals received will be evaluated by an RFP Evaluation Committee. During the evaluation process, the County may require a proposer's representative to answer specific questions orally and/or in writing. The County may also require a visit to the proposer's offices, other field visits or observations by County representatives, or demonstrations as part of the overall RFP evaluation. Once a finalist or group of finalists is selected, additional interactions or information may be required. The most qualified individual or firm will be recommended by the RFP Evaluation Committee based on the overall strength of each proposal, and the evaluation is not restricted to considerations of any single factor such as cost. The RFP Evaluation Committee will use Enclosure 3 OPHT Evaluation Scoring Sheet for proposal evaluation.

Responses to this RFP must adhere to the format for proposals detailed in Section V - PROPOSAL SUBMISSION REQUIREMENTS. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

- Qualifications and experience of the entity, including capability and experience of key personnel and experience with other public or private agencies to provide these services
- Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
- Customer service
- History of successfully performing services for public or private agencies
- Ability to meet any required timelines or other requirements
- Claims and violations against you or your organization
- Cost to the County for the primary services described by this RFP
- References
- Compliance with County RFP and contractual requirements

The County may consider any other criteria it deems relevant, and the Evaluation Committee is free to make any recommendations it deems to be in the best interest of the County. Inaccuracy of any information supplied within a proposal or other errors constitute grounds for rejection of the proposal. However, the County may, in its sole discretion, correct errors or contact a proposer for clarification.

Note that the County reserves the right to evaluate proposals solely based on each provider's written submission. In relation to written materials, evaluation will be performed only on the material included directly in the proposal itself unless otherwise indicated or requested by the County. Your proposal must be complete without relying on external websites, sales brochures, marketing materials or white papers.

The County reserves the right to accept proposals other than those with lowest costs.

E. PROPOSAL RECOMMENDATION

The Evaluation Committee will recommend a provider or providers or may recommend that all proposals be rejected. The County will then make its own decision as to whether to accept or reject the recommendations from the Evaluation Committee. Ultimate acceptance or rejection of the recommended proposal and execution of a contractual agreement is the independent prerogative of the County, notwithstanding any recommendations made by the Evaluation Committee. The County reserves the right to negotiate with any provider to finalize an agreement in relation to the proposer's response.

F. NOTICE TO PROPOSERS

The County is not required to give notice to proposers in any specific format or on any particular timeline. At some point prior to execution of a final agreement for the

requested services, the County will notify those who submitted proposals of their non-selection. Proposers may be notified at different times depending on the needs of the County.

G. PROTEST PROCESS

If a proposer desires to protest the selection decision, the proposer must submit by facsimile or email a written protest within 5 working days business days after the delivery of the notice about the decision. The written protest should be submitted to the publicpurchase.com as outlined below. Protests received after the deadline will not be accepted. Protests must be in writing, must include the name and address of the proposer and the RFP number, and must state all the specific grounds for the protest. A protest that merely addresses a single aspect of the selected proposal (for example, comparing the cost of the selected proposal in relation to the non-selected proposal) is not sufficient to support a protest. A successful protest will include sufficient evidence and analysis to support a conclusion that the selected proposal, taken as a whole, is an inferior proposal.

The County will respond to a protest within 5 business days of receiving it, and the County may, at its election, set up a meeting with the proposer to discuss the concerns raised by the protest. The decision of the County will be final. The protest letter must be sent as follows:

publicpurchase.com

SECTION V – PROPOSAL SUBMISSION REQUIREMENTS

The proposal should be submitted in the following format:

A. GENERAL INSTRUCTIONS

All proposals should be typewritten or prepared on a computer and have consecutively numbered pages, including any exhibits, charts, and/or other attachments.

All proposals should adhere to the specified content and sequence of information described by this RFP.

Submit one (1) complete electronic (PDF) version of your proposal and any required attachments to the County via www.publicpurchase.com per the instructions found on the publicpurchase.com website.

B. COVER LETTER

Provide a one page cover letter on your letterhead that includes the address, voice and facsimile numbers, and e-mail address of the contact person or persons. List the name and title of each person authorized to represent the proposer in negotiations.

Unless the proposer is an individual, all proposals must be signed with a firm/company/partnership/entity name and by a responsible officer or employee indicating that officer or employee's authorization to commit the proposer to the terms of the proposal. Obligations assumed by such signature must be fulfilled.

C. SPECIFIED CONTENT AND DETAILED SEQUENCE OF INFORMATION IN THE RFP

Each proposal should include sections addressing the following information in the order shown in the following section. The proposer should be sure to include all information that it feels will enable the Evaluation Committee and, ultimately, the County to make a decision. Failure of the proposer to provide specific, detailed information may result in its proposal being rejected in favor of a sufficiently-detailed proposal. Any necessary exhibits or other information, including information not specifically requested by this RFP but that you feel would be helpful, should be attached to the end of the proposal. The party submitting the materials should keep in mind the limitations on confidential information described in Section IV.

D. TABBING OF SECTIONS

TAB 1 Qualifications and Experience:

- 1) Provide a statement of qualifications for your organization, including an organization chart, a statement of the size of firm, a description of services provided by your organization, and a statement of the extent of experience/history providing the services requested by this RFP.
- 2) How many full time employees (FTEs) do you plan to assign to this project if you are selected?
- 3) How many people in total are employed by your company? Delineate between employees and consultants.
- 4) If applicable, list the professional qualifications for each individual that would be assigned to provide services requested by this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae for each such individual if the resume/CV includes all the requested information.

TAB 2 Philosophy and Service Model:

This section describes your philosophy and service model for meeting the services required by this RFP. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (including planning for absences and back-up coverage, training, background checks, and staff monitoring, etc.), and equipment or other resources provided by you (if applicable). Keep these considerations in mind as you respond to the following:

- 1) Describe how you will fulfill the needs of the County described in this RFP. Attach a project plan, if appropriate.
- 2) List your needs for physical space and/or equipment at the County during this engagement, if any, aside from space or equipment that would be provided by the County as an obvious aspect of the requested services (for example, space to treat patients, computers to document services, etc.).
- 3) Identify how you will meet all other aspects of the scope of work and related requirements stated above. List any items that you cannot provide.
- 4) Describe the measurements/metrics/deliverables/assessments that you will provide on at least an annual basis to allow the County to assess the services you will provide.
- 5) Provide information on any other pertinent services, if any, that you will offer that will reduce costs or enhance revenue for the County.

TAB 3 Customer Service:

- 1) How will your services meet the needs of County customers and/or the public?
- 2) In the event of a routine problem, who is to be contacted within your organization?
- 3) In the event of the identification of a problem by the County, its clients/patients, and/or other applicable constituents, describe how you will address such problems and the timeframe for addressing them.

TAB 4 Claims, Licensure, Non-Discrimination, and Health Insurance Portability and Accountability Act (HIPAA) Violations Against Your Organization:

List any current licensure, HIPAA, non-discrimination claims against you/your organization and those having occurred in the past five years, especially any resulting in claims or legal judgments against you.

TAB 5 Cost Analysis and Budget for Primary Services:

- 1) Provide a detailed explanation for all costs associated with your firm providing the requested services if you are selected.
- 2) Is travel time to the County expected to be billable? If so, how will travel time invoices be calculated? Generally, proposals that do not include travel time or expenses are preferred unless the services requested require travel as part of the service.
- 3) Include start-up costs if any.
- 4) Complete Enclosure 2: OPHT Fixed Pricing Form

TAB 6 Cooperative Purchasing:

- 1) State whether the resultant contract can be extended to other San Mateo County departments and/or public agencies in the San Francisco Bay area upon their

request. Your response to this inquiry will not affect the selection decision unless other factors are deemed to be equal by the County.

- 2) List any additional services that you foresee may be necessary, if any, and list the proposed costs for such services.

TAB 7 Quality/Program Evaluation:

Each program may have specific quality/evaluation issues, below are some examples:

- 1) Describe the Quality Improvement plan. The plan should include a description of utilization review, co-occurring capability development, medication monitoring, case documentation, peer review, and other issues pertaining to quality improvement mandates and policies.
- 2) Describe a contingency emergency plan.
- 3) Describe credentialing/licensing.

TAB 8 References:

- 1) List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided.
- 2) Provide at least three client/patient references, if applicable and appropriate, for whom you have provided more than occasional services. Include names, titles, e-mail addresses and phone numbers for these individuals.

TAB 9 Statement of Compliance with County Contractual Requirements:

A sample of the County's standard contract (including Exhibits A and B) is attached to this RFP. Each proposal must include a statement of the proposer's commitment and ability to comply with each of the terms of the County's standard contract, including but not limited to the following:

- 1) The County non-discrimination policy
- 2) The County equal employment opportunity requirements
- 3) County requirements regarding employee benefits
- 4) The County jury service pay ordinance
- 5) The hold harmless provision
- 6) County insurance requirements
- 7) The County Living Wage Ordinance
- 8) All other provisions of the standard contract

In addition, the proposer should include a statement that it will agree to have any disputes regarding the contract venued in San Mateo County or Northern District of California.

The proposal must state any objections to any terms in the County's contract template and provide an explanation for the inability to comply with the required term(s). If no objections are stated, the County will assume the proposer is prepared to sign the County standard contract template as-is.

NOTE: The sample Standard Contract Template enclosed with this RFP is a template and does not constitute the final agreement to be prepared for the selected service provider. Do not insert any information or attempt to complete the enclosed sample contract template. Once a provider is selected, the County will work with the selected provider to draft a provider-specific contract using the template. However, each proposal should address the general terms of the standard contract as requested within this RFP.

SECTION VI – ENCLOSURES

Enclosure 1 Sample Standard Contract Template

Enclosure 2 OPHT Fixed Pricing Form

Enclosure 3 OPHT RFP Evaluation Scoring Sheet

Appendix A Overview Map of the proposed O-PHT in San Mateo County.