

City and County of San Francisco

Sourcing Event ID 0000011339

Formal Request for Proposals for:

Consulting services in the following program areas:

Program Area 1: California Advancing and Innovating Medi-Cal (“CalAIM”) Readiness Assessment
Program Area 2: Pretrial Services Transfer and Implementation

View this solicitation on the City’s Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>



| Proposal Phase | Tentative Date |
|---|---|
| Request for Proposals Issued | December 10, 2025 |
| Pre-Proposal Conference | December 22, 2025 11:30 A.M. – 12:30 PM (Pacific Time) +1 415-906-4659 Phone conference ID: 268 186 489# Meeting ID: 296 209 849 198 48 Passcode: Yb3u4bw9 |
| Written Questions Due Date | December 19, 2025 |
| Proposal Due Date | January 12, 2026 |
| Notice of Intent to Award | January 19, 2026 |
| Period for Protesting Notice of Intent to Award | Within three (3) business days of the City's issuance of a Notice of Intent to Award. |
| Contract Administrator: | Seth Kilbourn Fiscal and Contracts Compliance Manager 945 Bryant St., San Francisco, CA 94103 seth.kilbourn@sfgov.org (628) 652-2326 |

Attachments

- Attachment 1: City’s Contract Terms
- Attachment 2: Proposer Questionnaire and References
- Attachment 3: Omitted (CMD LBE Forms)
- Attachment 4: Written Proposal Template (Program Area 1: CalAIM)
- Attachment 4: Written Proposal Template (Program Area 2: Pretrial Services)
- Attachment 5: Price Proposal Template
- Attachment 6: HCAO and MCO Declaration Forms
- Attachment 7: First Source Hiring Form

PROPOSAL PACKET: MINIMUM QUALIFICATIONS DETERMINATION

Each Proposer must submit a proposal packet organized by the Minimum Qualifications (MQ) listed below, with each section of the packet clearly marked as MQ 1, MQ 2, etc. to indicate which MQ that section supports. Each packet will be initially screened on a pass/fail basis to determine whether the proposer meets the Minimum Qualifications. The criteria for the pass/fail determination are: 1) completeness of the packet, and 2) inclusion of sufficient documentation to support each MQ. A proposer who fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process. The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

| MQ # | Description |
|--------|--|
| MQ # 1 | Any proposed changes to Attachment 1, City's Contract Terms. If no changes are proposed, indicate "No Changes Proposed" in the MQ. |
| MQ # 2 | Completed Attachment 2, Proposer Questionnaire and References |
| MQ # 3 | Completed Attachment 4, Written Proposal Template |
| MQ # 4 | Completed Attachment 5, Price Proposal Template |

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I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by the Adult Probation Department (hereinafter, “APD” or “City”). APD is seeking qualified suppliers (“Proposers”) to provide proposals (“Proposal”) for consulting services to support the two program areas goals described below.

APD shall enter into separate contracts for each program area and order goods and/or services covered by the awarded contract(s) through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract(s) during the contract term.

a. Program Area 1: CalAIM Readiness Assessment and Progress Reports

Development of a Readiness Assessment and two progress reports to support the implementation of APD’s CalAIM Implementation Plan, which together supports Medi-Cal enrolment and re-entry service coordination for justice involved adults. The readiness assessment and plan are subject to the requirements of the California Advancing and Innovating Medi-Cal (“CalAIM”) JI (“Justice-Involved”) initiative, and subject to approval by the California Department of Health Care Services (DHCS). APD’s Implementation Plan was submitted for approval on November 1, 2025. The Readiness Assessment is due on March 31, 2026, and must demonstrate APD’s readiness for providing pre-release enrollment services and re-entry service coordination, as described in APD’s CalAIM implementation plan.

b. Program Area 2: Pretrial Services Transition

Development of an assessment, operational design, administrative structure, and implementation plan to establish a Pretrial Services Division at APD and support the structured transition of pretrial service operations from the Sheriff’s Department to APD on July 1, 2026. Deliverables include preparing governance structures, staffing models, operational processes, data systems, and implementation schedules. Project deliverables and outcomes must align with the Statewide Pretrial Program (SB 129), established to fund programs and practices that promote safe, efficient, fair, and timely pretrial programs.

2. Selection Overview

The City shall award a contract to the Proposer(s) in each program area that meets the Minimum Qualifications of this Solicitation and whose Proposal receives the highest-ranking score in that program area. Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein. If applicable, a Contract Monitoring Division (CMD) Contract Compliance Officer will assess Proposal compliance with Local Business Enterprise (LBE) requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score in that program area, then continuing with the Proposer receiving the second highest score in that program area, and so on.

B. Anticipated Contract Term

Each of the two contracts awarded pursuant to this Solicitation shall be non-exclusive with an original term of 1 year.

C. Anticipated Contract Not to Exceed Amount

Each of the two contract(s) awarded pursuant to this Solicitation shall each have a not to exceed (“NTE”) amount of \$100,000 for the total allowable maximum term.

D. Reserved.

E. Reserved.

F. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other published pertinent information.

| Proposal Phase | Tentative Date |
|---|---|
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| Contract Administrator: | Seth Kilbourn Fiscal and Contracts Compliance Manager 945 Bryant St., San Francisco, CA 94103 seth.kilbourn@sfgov.org (628) 652-2326 |
| Pre-Proposal Conference Details | |
| The Pre-Proposal Conference will begin at the time specified. Proposers' representatives are urged to arrive on time. Topics already covered will not be repeated for the benefit of late arrivals. <i>Failure to attend the Pre-Proposal Conference shall not excuse the awarded Proposer from any obligations of a contract awarded pursuant to this Solicitation.</i> Any change or addition to the requirements contained in this Solicitation as a result of the Pre-Proposal Conference will be executed by a written Addendum to this Solicitation. It is the responsibility of the Proposer to check for any Addendum to this Solicitation or other published pertinent information. | |

G. Contract Terms and Negotiations

The successful Proposer will be required to enter into a contract substantially in the form attached hereto as Attachment 1, City's Contract Terms. If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the

Minimum Qualifications of this Solicitation whose Proposal receives the next highest-ranking score.

1. Proposed Changes

If Proposer is unable to accept City's Contract Terms substantially in the form presented, Proposer shall include in its proposal packet a revised copy of City's Contract Terms or a summary of proposed changes. The revised copy of City's Contract Terms or summary must:

- (1) Identify sections to which it objects (e.g., Sec. 3.3.3);
- (2) Set forth Proposer's alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

2. No Proposed Changes

If Proposer has no proposed changes and accepts the City's Contract Terms substantially in the form presented, Proposer shall include in its proposal packet a revised copy of City's Contract Terms or a summary of proposed changes, clearly marked "No Proposed Changes."

II. GOODS AND SERVICES REQUESTED

A. Goods and/or Services Requested

This Solicitation is being issued by the Adult Probation Department ("APD"). APD is seeking qualified suppliers ("Suppliers") to provide proposals ("Proposal") for consulting services to support two program areas goals.

1. Program Area 1: CalAIM Readiness Assessment and Progress Reports

In Program Area 1, APD is seeking proposals to develop and secure state approval for APD's required CalAIM Readiness Assessment ("Assessment") and associated progress reports. The California Department of Health Care Services (DHCS) will use the Readiness Assessment to determine APD's preparedness to support Medi-Cal enrolment and re-entry service coordination for APD's clients, and other justice involved adults, as described in its CalAIM implementation plan submitted to DHCS in November 2025. The CalAIM Implementation Plan and Readiness Assessment are subject to the requirements of the California Advancing and Innovating Medi-Cal ("CalAIM") JI ("Justice-Involved") initiative, and the CalAIM-PATH-3 funding restrictions.

At the direction of the Chief Probation Officer or her designee, and in coordination with stakeholders, Supplier will develop the Readiness Assessment and required progress reports, pursuant to the CalAIM-PATH-3 funding and program requirements. The Supplier will submit a draft of the Readiness Assessment for APD review by March 15, 2026 and revise the draft accordingly for APD to submit the final Readiness Assessment to DHCS by March 31, 2026.

a. Program Area 1: CalAIM Readiness Assessment

Ensure completion and submission of the CalAIM Facility Readiness Assessment and related deliverables for the Adult Probation Department.

- Prepare CalAIM Facility Readiness Assessment that aligns with DHCS guidelines and APD operational needs.
- Develop program reports in accordance with DHCS guidelines and APD operational needs.

b. Program Area 1: CalAIM General Consultation Services

Provide general consultation services and technical assistance to APD prior to CalAIM pre-release services by September 30, 2026, including:

- Data Use Agreement (DUA) to enable pre-release warm handoffs and linkages between agencies.
- Allowable and billable pre-release services authorized by DHCS under the CalAIM Reentry Program for the Adult Probation Department.
- Workflows related to warm handoffs and linkages for adults being released from detention facilities, and connected to post-release services through the Adult Probation Department.
- Provide problem-solving and technical support to Adult Probation Department staff during the launch phase.

c. Program Area 1: CalAIM Deliverables

Complete the following deliverables. Due dates are subject to change as agreed upon by County and Supplier.

| Deliverable/Milestone | Due Date |
|---|-----------------|
| CalAIM Justice Involved Readiness Assessment. | 3/31/2026 |
| PATH 3 final progress report. | 5/1/2026 |
| General Consultation Services through | 9/1/2026 |

2. Program Area 2: Pretrial Transition

In Program Area 2, ADP is seeking proposals to establish a new Pretrial Services Division and support a structured transition of pretrial service operations from the Sheriff's Department to APD on July 1, 2026. The project goals include development of an agency transition plan, building interagency decision-making structures, and creating an operations infrastructure. The associated project tasks include staffing models, policies and procedures, data systems, and implementation schedules. Project deliverables and outcomes must align with equitable and least restrictive supervision models, and the Statewide Pretrial Program (SB 129), established to fund programs and practices that promote safe, efficient, fair, and timely pretrial programs.

a. Program Area 2: Pretrial Assessment

Assess current Pretrial Services operations, including:

- Current operations review and report
- Analysis of jail population
- Gap Analysis and Risk Matrix

b. Program Area 2: Pretrial Systems Design

Provide general consultation services and technical assistance to APD to build operational and staff models and shared governance framework, including:

- Process maps
- Supervision framework
- Staffing plan and job descriptions
- Operational Policies and Procedures
- Performance metrics data needs and strategy

c. Program Area 2: Pretrial Implementation & Transition Support

Develop and implement coaching and training for APD leadership and pretrial staff on their roles and responsibilities.

- Implementation Toolkit
- Transition Roadmap
- Continuous Improvement Plan

d. Program Area 2: Pretrial Deliverables

Complete the following deliverables. Due dates are subject to change as agreed upon by County and Supplier.

| Deliverable/Milestone | Due Date |
|-------------------------------------|-----------|
| Phase 1: Assessment | |
| Current-State Assessment | 2/28/2026 |
| Gap Analysis & Risk Matrix | 2/28/2026 |
| Phase 2: System Design | |
| Process Maps | 4/30/2026 |
| Supervision Framework | 4/30/2026 |
| Staffing Plan & Job Description | 5/31/2026 |
| Operational Policies | 5/31/2026 |
| Performance Metrics & Data Strategy | 5/31/2026 |
| Phase 4 | |
| Implementation Toolkit | 6/30/2026 |
| Training Plan and Implementation | 6/30/2026 |
| Transition Roadmap | 6/30/2026 |

B. Regulatory and Compliance Requirements Specific to the Goods/Services Solicited

Prior to submitting a Proposal in response to this Solicitation, Proposers must ensure they have fully read and understood the “Regulatory and Compliance Requirements” set forth below.

C. Green Purchasing Requirements

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City Mandatory Green Purchasing Requirements to ensure all goods and services offered to City in response to this Solicitation comply with the City’s Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City’s Contract Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

D. Reserved.

E. Reserved.

III. LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM REQUIREMENTS

A. CMD Compliance Officer

The CMD Compliance Officer (CCO) for this Solicitation and any Contract awarded pursuant to this Solicitation is:

Contract Monitoring Division
 City and County of San Francisco
 Tel: 415.554.0630
 Email: LBECert@sfgov.org
 Website: www.sfgov.org/cmd.

B. Application of LBE Rating Bonuses

LBE Rating Bonuses shall be applicable to at each phase of the Solicitation evaluation and selection process, in accordance with the values shown below.

1. Reserved

2. General and Professional Services

| Estimated Contract Value | Small/Micro LBEs Rating Bonus | SBA LBEs Rating Bonus |
|---|--------------------------------------|---|
| Greater than \$20,000 but less than or equal to \$400,000. | 10% | 0% |
| Greater than \$400,000 but less than or equal to \$10,000,000. | 10% | 5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer's participation or, for Professional Services, an JV Proposer's participation.</i> |
| Greater than \$10,000,000 but less than or equal to \$20,000,000. | 2% | 2% |

3. Professional Services by Joint Ventures

| Estimated Contract Value | Small/Micro LBE Subcontracting Level | Rating Bonus |
|---|---|---------------------|
| Greater than \$20,000 but less than or equal to \$10,000,000. | Equals or exceeds 35%, but less than 40% | 5% |
| | Equals or exceeds 40%, but less than 100% | 7.5% |
| | 100% | 10% |

If applying for an LBE rating discount as a Joint Venture (JV), the Micro and /or Small-LBE must be an active partner in the JV and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the Proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the JV. The portion of the Micro and/or Small-LBE JV's work shall be set forth in detail separately from the work to be performed by the non-LBE JV. The Micro and/or Small-LBE JV's portion of the contract must be assigned a commercially useful function.

C. LBE Subcontracting Participation Requirements

There shall be no LBE Subcontracting Requirement for any Contract awarded pursuant to this Solicitation because the anticipated Contract NTE amount will be less than one half of the Minimum Competitive Amount.

- D. Reserved.**
- E. Reserved.**

IV. PROPOSAL PACKET EVALUATION CRITERIA

| Evaluation Phase | Maximum Points |
|--------------------------------------|-----------------------|
| Minimum Qualifications Documentation | Pass/Fail |
| Written Proposal | 100 Points |
| Price Proposal | Pass/Fail |
| TOTAL | 100 Points |

V. MINIMUM QUALIFICATIONS PROPOSAL PACKET (PASS/FAIL)

Proposers Each Proposer must submit a proposal packet organized by the Minimum Qualifications (MQ) listed below, with each section of the packet clearly marked as MQ 1, MQ 2, etc. to indicate which MQ and which program area that section supports. Each packet will be initially screened on a pass/fail basis to determine whether the proposer meets the Minimum Qualifications for that program area.

The criteria for the pass/fail determination are: 1) completeness of the packet, and 2) inclusion of sufficient documentation to support each MQ. **A proposer who fails to meet the Minimum Qualifications for that program area will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications for that program area.

| MQ # | Description |
|-------------|--|
| MQ # 1 | Any proposed changes to Attachment 1, City's Contract Terms. If no changes are proposed, indicate "No Changes Proposed" in the MQ. |
| MQ # 2 | Completed Attachment 2, Proposer Questionnaire and References |
| MQ # 3 | Completed Attachment 4, Written Proposal Template |
| MQ # 4 | Completed Attachment 5, Price Proposal Template |

VI. WRITTEN PROPOSAL (100 POINTS)

The Written Proposal must follow the order as outlined in **Attachment 4, Written Proposal Template** for the appropriate Program Area.

VII. PRICE PROPOSAL (PASS/FAIL)

A. Price Proposal Format and Allocation of Points

Proposers shall also submit a complete Price Proposal consisting of each item set forth Attachment 5, Price Proposal Template.

Price proposals will be evaluated on a pass/fail basis as measured by addressing all the points in the Price Proposal Template

B. Price Proposal Evaluation Period

The City will attempt to evaluate Price Proposals within 5 days after receipt of Proposals. If City requires additional evaluation time, all Proposers will be notified in writing of the new expected award date.

C. Price Discrepancies

Where applicable, if there is a discrepancy between the Price Proposal and pricing entered by Proposer into the Supplier Portal, the Price Proposal pricing will prevail. In the event of a discrepancy between the unit price and the extended price, the unit price will prevail.

D. Reserved.

E. Application of Discounts for Evaluating Lowest Responsive Proposer

1. Application of LBE Bid Discount to Price Proposal

Where price is a factor in City's evaluation process, Proposer's price shall be reduced by an amount equal to the applicable LBE Bid Discounts. The discount shall be applied solely for the purpose of determining the lowest responsive Price Proposal and shall be in addition to any other discounts, preferences, or adjustments required by City law.

2. Application of Prompt Payment Discounts to Price Proposal

Prompt Payment discount (discount for prompt payment) will not be taken into consideration in determining the Lowest Responsive Proposal.

3. Reserved.

4. Sample Discount Calculation

Evaluations are performed on a pre-tax basis except in rare instances, where tax may be a factor (i.e. One vendor bundles the commodities and services in such a way that the entire amount must be taxed, while another vendor clearly separates commodities and services). Below is an example of how bid discounts and/or rating bonuses are applied to a Price Proposal for commodities and services.

| Firm Is a Certified Micro LBE | Offered Price Proposal (Pre-Tax) | 14B LBE Bid Discount (10%) | Evaluated Price when determining Lowest Responsive Proposed Price |
|--------------------------------------|---|-----------------------------------|--|
| Services | \$1,000 | (\$100) | \$900 |

VIII. RESERVED

IX. SUPPORTING DOCUMENTATION REQUIRED PRIOR TO CONTRACT EXECUTION

Proposers must provide each Required Supporting Documentation ("RSD") identified below prior to Award. Failure to do so may result in the Proposal being deemed Non-Responsive.

| | |
|----------------|---|
| RSD # 1 | Evidence that Proposer is compliant or likely to become compliant within 30 calendar days of the Proposal Due Date with San Francisco Labor and Employment Code Articles 131 and 132. |
| RSD # 2 | Completed Proposal Attachments: <input type="checkbox"/> Attachment 6: HCAO and MCO Declaration Forms |
| RSD # 3 | Insurance in accordance with Article 5 of Attachment 1, City's Contract Terms. |

| | |
|---------|---|
| RSD # 4 | <p>Non-Profit Entities: If Proposer is a non-profit organization and receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds:</p> <p>(1) a statement describing Proposer's efforts to comply with the Chapter 12L provisions regarding public access to Proposer's meetings and records, and (2) a summary and disposition of all complaints concerning the Proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. If no such complaints were filed, the Proposer shall include a statement to that effect.</p> <p>Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the Proposal and/or termination of any subsequent agreement reached on the basis of the Proposal.</p> |
|---------|---|

X. FAILURE TO PROVIDE INSURANCE AND/OR BONDS

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the contract is awarded shall deliver the specified bond documents and/or insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

XI. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements can be found in Attachment 1, City's Contract Terms, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

A. Nondiscrimination Requirements

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in San Francisco Labor and Employment Code Articles 131 and 132. *Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Reserved.

C. Health Care Accountability Ordinance (HCAO)

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 121. For each Covered Employee, the awarded Contractor shall provide the appropriate health benefit set forth in Article 121.3. If the awarded Contractor chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of Article 121, as well as the Health Commission's minimum standards, is available on the web at <http://sfgov.org/olse/hcao>. An awarded Contractor is subject to the enforcement and penalty provisions in Article 121. Any Subcontract entered into by the awarded Contractor shall require any Subcontractor with 20 or more employees to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this Section. *Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

D. Minimum Compensation Ordinance (MCO)

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 111. For each Covered Employee, the awarded Contractor shall pay no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. An awarded Contractor is subject to the enforcement and penalty provisions in Article 111. Information about and the text of Article 111 is available on the web at <http://sfgov.org/olse/mco>. An awarded Contractor is required to comply with all of the applicable provisions of Article 111, irrespective of the listing of obligations in this Section. *Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

E. First Source Hiring Program

A Proposer selected pursuant to this Solicitation shall comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code. *Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

F. Reserved.

G. Non-Profit Entities

To receive a contract under this Solicitation, any nonprofit Proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of contract execution and must remain in good standing during the term of the agreement. Upon request, Proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If Proposer will use any nonprofit subcontractors to perform the agreement, Proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General's Registry of Charitable Trusts at the time of Contract execution and for the duration of the agreement.

H. Other Social Policy Provisions

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

XII. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. How to Register as a City Supplier

The following requirements pertain only to Bidders not currently registered with the City as a Supplier.

Step 1: Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

Step 2: Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit the online 12B Declaration for Article 131 (Equal Benefits Program) compliance through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Equal Benefits Program Inquiries:** For questions concerning the San Francisco Labor and Employment Code Articles 131 and 132, go to: www.sfgov.org/cmd.

B. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appear on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appear on the cover page of this Solicitation no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal:
<https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

2. Proposal Format

Proposals must be submitted in PDF format, created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least 1" on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements may negatively impact the evaluation of your Proposal.

3. Time and Place for Submission of Proposals

Prior to the Proposal submission deadline, Proposers must upload their complete Proposals into the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/index.aspx>. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be

considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

Proposers are encouraged to upload their Proposals to the SF Supplier Portal as early as possible to address any technical issues that may arise during the submission process. In the event a Proposer is unable to upload its complete Proposal into the SF Supplier Portal, Proposer must email its Proposal to the Contract Administrator whose name and contact information appear on the cover page of this Solicitation prior to the Proposal submission deadline and request confirmation of receipt. Proposer must include in its email: (a) documentation (e.g. screenshots) verifying its inability to upload its Proposal into the SF Supplier Portal and (b) a detailed justification explaining why it was not able to have the issue addressed prior to the submission deadline.

C. RFP Addenda

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED CONTRACT TERMS.

D. Public Disclosure

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

E. Limitation on Communications During Solicitation

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

F. Proposal Selection Shall not Imply Acceptance

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

G. Cybersecurity Risk Assessment

As part of City's evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product's performance, and/or accessing City's networks and systems. Where a prime contractor or reseller plays an active role in each of these activities, CRA may also be required for the prime contractor or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by the soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

H. Solicitation Errors and Omissions

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

I. Objections to Solicitation Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

J. Protest Procedures

1. Protest of Non-Responsiveness Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

2. Protest of Non-Responsibility Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

K. Proposal Term

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

L. Revision to Proposal

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

M. Proposal Errors and Omissions

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

N. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

O. Proposer's Obligations under the Campaign Reform Ordinance

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at (415) 252-3100 or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

P. Reservations of Rights by the City

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or
6. Determine that the subject goods or services are no longer necessary.

Q. No Waiver

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or act on account of a Proposer's failure to comply with this Solicitation.

R. Other

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered, and the work is to be performed. Factors considered by the City shall include, but not be limited to:
 - a. Any condition set forth in this Solicitation;
 - b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
 - c. Delivery time(s).
2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.
3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.
4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.
5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.