

Solicitation 1103-023

Strategic Planning for ADRC Implementation in California

State of California

Bid 1103-023

Strategic Planning for ADRC Implementation in California

Bid Number **1103-023**
Bid Title **Strategic Planning for ADRC Implementation in California**

Bid Start Date **Mar 18, 2011 4:08:20 PM PDT**
Bid End Date **Apr 29, 2011 12:00:00 PM PDT**
Question & Answer End Date **Apr 22, 2011 12:00:00 PM PDT**

Bid Contact **Liz Pazdral**
916-445-0142
liz@calsilc.org

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Description

The California State Independent Living Council (SILC) seeks a contractor with experience and expertise in strategic planning, facilitation, and health care financing to accomplish strategic planning goals for statewide Aging and Disability Resource Connections (ADRC) expansion efforts. The contract will require close coordination and cooperation between SILC's ADRC Program Manager, California Health & Human Services's (CHHS) California Community Choices Project Coordinator, and the statewide ADRC Advisory Committee.

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RFP 2011—SILC ADRC Strategic Planning Consultant

For
State Independent Living Council (SILC)

Aging & Disability Resource Connections in California Consultant Services for Strategic Planning and Cost-Benefit Analysis

Date: March 18, 2011

This procurement is being conducted pursuant to Government Code 14838.5, which authorizes the State to obtain quotes from small businesses. You must be a California Certified Small Business to submit a proposal.

You are invited to review and respond to this Request for Proposals (RFP). To submit an offer for these goods and/or services, you must comply with the instructions contained in this document as well as the requirements stated in the State's Scope of Work (SOW) (Attachment A), Consultant Qualifications and Client References (Attachment B), and Deliverables Cost Sheet and Budget (Attachment C). By submitting an offer, your company agrees to the terms and conditions stated in this RFP and your proposed contract. Vendors must submit a valid, active State Small Business Certification number to be eligible to apply.

Read the attached document carefully. Hard copies must be postmarked by and e-mail Submissions must be received at the address below by April 15, 2011, 12:00 Noon, Pacific Standard Time. It is the bidder's responsibility to confirm receipt of the proposal. Responses to this RFP and any required copies must be submitted by mail AND electronic mail, clearly labeled to the department address noted below.

Mail to:

Liz Pazdral, Executive Director
State Independent Living Center
1600 K Street, Suite 105
Sacramento, CA 95814

Email to:

Galen Ellis, ADRC Project Manager
State Independent Living Center
galen@elaskari.com

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General Information

1. Overview, Background, and Purpose of the RFP

Overview

The California State Independent Living Council (SILC) seeks a contractor with experience and expertise in strategic planning, facilitation, and health care financing to accomplish strategic planning goals for statewide Aging and Disability Resource Connections (ADRC) expansion efforts. The contract will require close coordination and cooperation between SILC's ADRC Program Manager, California Health & Human Services's (CHHS) California Community Choices Project Coordinator, and the statewide ADRC Advisory Committee.

Background

Federal Aging and Disability Resource Center (ADRC) Initiative: The original ADRC initiative was developed in 2003 and was funded through a cooperative effort between the Administration on Aging (AoA) and the Centers for Medicare and Medicaid Services (CMS). The purpose of the ADRC Initiative is to assist states in their efforts to create a coordinated system of information and access for all persons seeking long-term support services, to minimize confusion, enhance individual choice, and support informed decision-making. Federally-funded ADRC initiative grants focus on the following integrated consumer-oriented services and supports:

- Affordable choices and options that promote independence and dignity for individuals
- Consumer control and meaningful involvement in the design and delivery of the programs and services that affect their lives
- Information that empowers people to make informed decisions
- Easy access to a range of health, long-term care, and environmental supports
- Assistance to family caregivers
- Assurances that people are getting the highest quality care available

More information about the federal ADRC grants is available through the federal ADRC initiative website at <http://www.adrc-tae.org>.

Intersecting/Related California Projects: A number of state projects intersect to form California's dynamic approach to creating a more accessible, functional, and comprehensive long-term services and supports system. Of particular importance are the California Department of Aging (CDA)-supported ADRCs, the CHHS-supported ADRCs (Community Choices Project), the SILC-supported ADRC (Nevada County ADRC), and the California Community Transitions project:

- § Two ADRCs established by CDA comprised the original ADRC pilot program - San Diego and Del Norte counties. Due to the success of San Diego's ADRC collaborative partnership between the Area Agency on Aging (Aging and Independence Services) and the ILC (Access to Independence) a2i, CDA submitted and was awarded a one-year grant from AoA to establish two new ADRCs. The award supported the development of two regional ADRC partnerships between the local Area Agencies on Aging and the local Independent Living Centers. San Francisco and a five-county regional partnership (Butte, Colusa, Glenn, Plumas and Tehama) were selected. The regional ADRCs also partner with the Long-term Care Ombudsman program in assisting nursing home residents prepare for and transition to more independent community living.
- § CHHS/Community Choices Project established two ADRCs, one in Orange County, the other in Riverside County, in 2008. The CHHS ADRC program is part of the

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California Community Choices Project, a federal Real Choice Systems Transformation five-year grant (September 2006 to September 2011).

- § With funding from the AoA, SILC established the newest ADRC in Nevada County in which the lead agency is an Independent Living Center. SILC purposefully established an ADRC that could demonstrate a strong independent living philosophy as outlined on SILC's website (www.calsilc.org), including the core values of equal opportunity; equal rights; full access; informed decision-making; self determination; choice; empowerment and public participation.

All in all, California fosters a total of seven ADRC pilot sites. Although models differ, all seven ADRCs are dedicated to increasing access to home and community-based services and providing information, referrals and assistance to all Californians navigating the long-term support system.

- § The California Community Transitions Project, funded by a five-year Centers for Medicare and Medicaid Services (CMS) Money Follows the Person Demonstration Grant in January 2007, is providing 2,000 persons residing in health care institutions (including older adults and persons with disabilities of all ages) the opportunity to return to the community. The Transitions Project's infrastructure development included the establishment of up to 10 local Community Transition Teams. The SILC program contractor(s) are expected to have a relationship with the Community Transition Teams if available.

All of the ADRC programs are based on the values of individual choice, independence, self-determination and community living detailed in the 2001 federal New Freedom Initiative, a nationwide effort to remove barriers to community living for people of all ages with disabilities and long-term illnesses. Building a sustainable infrastructure to support streamlined access to community-based services and long-term care reform constitutes the over-arching goal of all of the State initiatives.

Purpose

The Strategic Planning Consultant will assist SILC's ADRC Program Manager, CHHS's California Community Choices Project Coordinator, and the statewide ADRC Advisory Committee in accomplishing the following goals and objectives:

Goal 1: *The state will have uniform criteria and a standard process for designating ADRCs and monitoring core ADRC functions, Information and Assistance (I&A); Options Counseling; Short Term Service Coordination; and Care Transition Services.*

Major Objectives:

- 1.1. Establish a statewide Advisory Committee to advise the State on ADRC expansion efforts.
- 1.2. To collaborate with key stakeholders (ADRCs, aging and disability network providers, and state departments) in the planning and expansion of ADRCs (to include designation criteria such as geographic service area, outreach plans, primary and secondary partners, core service requirements, and system requirements).
- 1.3. To establish designation standards and an application process for ADRC designation.

Goal 2: *The State will have a strategic plan that identifies existing funds/programs that will be used to expand the ADRC model, and include a budget that identifies the added costs to the state, above and beyond funding that is already being expended on ADRC-type functions under existing programs, to implement the plan. The plan will also include projected cost savings that the state will achieve as a result of statewide implementation.*

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Major Objectives:

- 2.1. To produce a strategic plan document that would serve as a roadmap for further development of the ADRC network in California.
- 2.2. To analyze the benefits and costs of ADRC expansion to the State.
- 2.3. To present an analysis of cost-benefit findings in a written report to all stakeholders.

The purpose of this RFP is to procure consulting services to:

- Facilitate strategic planning sessions with the statewide ADRC Advisory Committee
- Plan agendas in collaboration with SILC and CHHS
- Conduct research and make recommendations on ADRC designation standards and best practices
- Conduct research and provide analytical reports on state, local and other costs; and cost savings of implementing ADRCs
- Write reports, both interim and final

The specific deliverables associated with this RFP are included in Attachment A – Scope of Work.

2. Key Dates

Time is always of the essence for both the RFP submittal and contract completion. Vendors are advised of the key dates and times shown below and are expected to adhere to them. All dates with the exception of the RFP submission due date are approximate and may be adjusted as conditions indicate.

<u>Event</u>	<u>Date</u>
1. Release of RFP	March 18, 2011
2. RFP Response Submission Due	April 29, 2011 by 12:00PM PST
3. State Review of RFP Submissions	May 2 – May 6, 2011
4. Vendor Interviews (if needed)	May 10-12, 2011
5. Notification of Intent to Award	May 13, 2011
6. Contractor begins work	July 1, 2011

3. Cost

The chosen contractor will be responsible for all his/her own operating expenses and overhead, and clerical support associated with this endeavor. A budgeted amount of a maximum of \$48,000, including travel, has been allocated for this project. Proposals that exceed this budgeted amount will be rejected.

4. RFP Response

This RFP and the vendor's response to this document will be made part of the contract. Note that all agreements entered into with the State of California will include by reference General

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Terms and Conditions and Contractor Certification Clauses that may be viewed and downloaded at Internet site www.ols.dgs.ca.gov/standard+language.

Responses must contain all requested information and data and conform to the format described. It is the vendor's responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the vendor's ability to perform the tasks and activities defined in the vendor's offer.

5. RFP Response Content

IMPORTANT: Please use 12 pt font and 1" margins in your narrative sections. The contractor must submit **one copy** of their response to the SILC contact name and address contained on the first page of this RFP.

a) Response Cover Sheet

The response cover sheet must include the **title and number of this RFP** as well as the contractor information listed below:

- Company name, contact and company
- Small Business Certification number
- Disabled Veterans Business Enterprise (DVBE) certification number (if applicable)
- Signature of an individual authorized to enter into contracts for the contractor.

b) Consultant Qualifications and Client References

Complete the "Consultant Qualifications and Client References Form" form. Provide at least three customer references where you provided consulting services similar to those in this RFP. **NOTE:** SILC does not permit the use of subcontractors during the offer submission process or the duration of awarded contract.

c) Resume

Provide a resume of the relevant experience for the contractor proposed (identified in item 5c) for the project. Resume entries should clearly demonstrate that the experience requirements described in the "Consultant Qualifications and Client References" form of the RFP are met.

d) Description of Tasks to be Performed

Include a description of your understanding of the scope of work; emphasize your understanding of SILC's objectives and the major activities that must be performed to complete the work. Describe the activities you will perform to complete the required work. Include your expectations of all entities outside your own team.

e) Methods and Tools

Describe the methods, tools and standards that will be used to complete the following:

- Gaining input from key stakeholders
- Research and reporting on fiscal impacts of ADRCs on the State
- Production of written strategic plan

f) High Level Project Plan

Include a high level Project Plan showing the major tasks for completing this project, the anticipated duration for each task, and the dependencies between the tasks.

g) Costs

Provide costs by deliverable in a table similar to the one shown in Attachment C. Provide the cost per hour to be used as the basis for any additional work, should the purchase

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order be amended as described in the General Provisions section of this RFP. The offered cost is not to exceed \$48,000.

h) Work Samples

Provide the following work samples to demonstrate the experience, knowledge and ability of the proposed team. The objective is to provide samples that illustrate the project team members' performance of similar work on projects of similar size and scope.

- Relevant excerpts from a written strategic plan (not to exceed 5 pages).
- Relevant excerpts from a report on best practices research (not to exceed 5 pages).
- Optional: A brief explanation (not more than one page) explaining the rationale for selection to accompany the samples.

6. Review of Offers for Award/Selection Criteria

Responses to this RFP will first be reviewed for responsiveness to all requirements of RFP Response Content identified in Item 5. If a response is missing information required, the offer may be deemed not responsive. Further review is subject to the discretion of SILC.

Each offer for services will be reviewed and scored on the following criteria:

- Mandatory Submission Elements and Experience
- Desirable Experience
- Approach and Methodology
- Work Samples
- Customer References
- Organization Chart
- Cost
- Interviews

7. Interviews

SILC will schedule interviews with the highest-rated vendors based on the submitted offers. The SILC selection team does not wish to receive a presentation on corporate/company qualifications. The selection team expects the consultant to describe their understanding of the job, their approach to performing the work, and how they have executed a similar project in the past.

8. Debriefings

Written or oral debriefings will not be given to unsuccessful respondents.

9. Disposition of Response Materials Following Award

All materials submitted in response to this RFO will become the property of SILC and, as such, are subject to the Public Records Act (GC Section 6250, et seq.). SILC will disregard any language purporting to render all or portions of any response and price offer confidential.

Following SILC's award decision, SILC will release the name of the intended contract awardees. Following Purchase Order approval, all materials submitted in response to this RFO and all documents used in the award process shall be available for review, inspection, and copying during normal business hours.

10. Inspecting/Obtaining Copies Of Offers And/Or Response Materials

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Persons wishing to obtain copies of any response, price offer, or RFP related materials may submit a written request to SILC via electronic mail, U.S Postal Service, or hand delivery at the address identified below. The requestor must specifically identify and/or describe the items he or she wishes to receive copies of and indicate the number of copies requested.

SILC reserves the right to impose a charge of ten cents per page for all requested copies. If a copying/mailling fee is imposed, the requestor will be required to submit a check or money order covering the copying and/or mailing costs to SILC at the address noted below. SILC will attempt to fulfill all copy requests as promptly as possible. Submit copy requests as follows:

U.S. Postal Service:	Courier or Hand Delivery:
Galen Ellis, ADRC Project Manager P.O. Box 901 Nevada City, CA 95959	Liz Pazdral, Executive Director State Independent Living Center 1600 K Street, Suite 105 Sacramento, CA 95814
Email: galen@elaskari.com	

11. Contract Award

Award of a contract resulting from this RFP will be based on a best value methodology that includes cost as a factor in the selection process. Any award will be made contingent upon availability of funding and expenditure authority.

12. Award Objections

California law does not provide a protest or appeal process against award decisions made through an informal selection method. Respondents submitting a price offer in response to this Request for Offer may not protest or appeal the award. SILC's award decision shall be final.

ATTACHMENT A – SCOPE OF WORK

This Scope of Work (SOW) reflects the services to be provided by the contractor for SILC.

A. Scope and Description

SILC is seeking a contractor to:

- Facilitate a total of six strategic planning sessions with the statewide ADRC Advisory Committee in Sacramento, California.
- Facilitate two stakeholder forums, one in Southern California and one in Northern California.
- Write summary reports for strategic planning sessions and stakeholder analysis. Complete qualitative analysis of all sessions.
- Plan agendas in collaboration with SILC and CHHS staff
- Conduct research and make recommendations for ADRC designation standards and best practices in interim and final reports.
- Conduct research and provide analytical reports on state, local and other costs and cost savings of implementing and maintaining ADRC partnerships and services.
- Develop and maintain an up-to-date, detailed project work plan with deliverables and timelines. Update the project plan any time changes are required and submit to the SILC ADRC Project Manager.
- Submit monthly written status reports to the SILC ADRC Project Manager.
- Attend bi-weekly scheduled project meetings with the SILC ADRC Project Manager and/or project team.
- Provide technical assistance in addressing questions from the SILC ADRC Project Manager and Executive Director, the CHHS Community Choices Project Director, and other project team members during the contract period.

B. Period of Performance

The period of performance for this agreement shall be July 1, 2011, or upon Department of General Services approval until September 30, 2012.

C. Contractor Responsibilities

Contractor Responsibilities:

- Work with SILC and other designated representatives from CHHS, Department on Aging, Department of Rehabilitation, Department of Health Care Services and the ADRC Advisory Committee under the direction of the SILC ADRC Project Manager.
- Comply with all applicable SILC and state policies and procedures including, but not limited to, policies regarding Sexual Harassment Prevention, Health Insurance Portability and Accountability Act of 1996 Privacy, IT Security, Workplace Violence Prevention, and Emergency Preparedness.
- Designate a person to whom all project communications shall be addressed and who has the authority to act on all aspects of the contract for services. This person shall be responsible for the overall project and shall be the contact for all invoice issues and contractor staffing issues.
- Formally respond to SILC and CHHS review results. Written reports will be subject to review and approval by SILC and CHHS. Payment to the contractor will be contingent upon final approval of each written deliverable.

ATTACHMENT A – SCOPE OF WORK

D. Contractor Qualifications

The contractor will work individually or assemble a team to complete the deliverables specified in this contract. The contractor will make its best effort to maintain staff continuity throughout the life of the project. SILC will be notified in writing of any changes in the personnel assigned to the project. If a contractor employee is unable to perform his or her duties due to illness, resignation, emotional instability, incarceration, or other factors beyond the contractor's control, the contractor will provide equivalent substitute personnel. Prior to initiating work, the substitute personnel must meet all requirements of this contract, provide a resume and sample work, and be interviewed and approved in writing by SILC. The inability of the contractor to provide an acceptable substitute candidate may result in termination of the contract at the discretion of SILC.

Mandatory qualifications:

At a minimum, the contractor must have experience in all areas listed below. Failure to meet these mandatory qualifications will result in the disqualification of the proposal.

- Minimum five years experience in strategic planning consulting, including at least one year providing those services to California state agencies and departments.
- Minimum five years of experience conducting research on best practices in the health care, social services and/or or long-term services and supports.
- Minimum two years of experience conducting cost-benefit analyses.
- Familiarity with independent living principles and values.

E. Deliverables

- Written deliverables are to be delivered to SILC in "final" form. Deliverables must be free of grammatical and spelling errors, internal references and logic must be consistent, all "TBDs" must be resolved, and formatting must be correct. Deliverables that do not meet satisfactory review and approval by SILC may result in termination of the contract at the discretion of SILC.
- The contractor will provide deliverables as electronic mail attachments in Microsoft Office 97-2003 or Rich Text Format. Any exceptions will be communicated in writing from the SILC ADRC Project Manager. The distribution of deliverables will be provided to the contractor by the SILC ADRC Project Manager.

F. Acceptance Criteria and Invoicing

Acceptance criteria shall consist of the following:

- Written deliverables are completed as specified and approved.
- If SILC does not approve the identified deliverables in this SOW, payment of invoice will be withheld by SILC and the contractor will be notified. The contractor must take timely and appropriate measures to correct or remedy the reason(s) for non-approval, and demonstrate to the SILC that it has successfully completed the deliverable before payment will be made.

It shall be the State's sole determination as to whether a deliverable has been successfully completed and acceptable to the State. There must be a signed acceptance document for each deliverable before invoices can be processed for payment.

ATTACHMENT A – SCOPE OF WORK

The contractor shall submit invoices to the SILC ADRC Project Manager monthly. Only travel conducted in the billing month will be reimbursed, regardless of what was included in the travel budget.

A 10% withhold (paid on project completion) will be placed on the contract as required by Public Contract Code 10346.

Funding for this project is contingent on the State receiving funds from the Administration on Aging..

G. Other Reporting Requirements

Written reports will be subject to review and approval by SILC and other designated representatives CHHS and the ADRC Advisory Committee. The contractor will be required to formally respond to SILC review results. Payment to the contractor will be contingent upon final approval of each written deliverable.

H. State Responsibilities

- SILC shall designate the ADRC Project Manager who shall be the contact person to whom all contractor communications may be addressed and who has the authority to act on all aspects of the services. This person will review the agreement and associated documents with the contractor to ensure understanding of the responsibilities of both parties.
- SILC shall schedule meetings of the ADRC Advisory Committee.
- SILC shall provide logistical support for meetings of the ADRC Advisory Committee.
- SILC will provide sufficient access to appropriate levels of staff and other stakeholders as appropriate to facilitate the performance of consulting tasks and creation of consulting deliverables.
- SILC will provide timely review and approval of the deliverables provided by the contractor in order for the contractor to perform its obligations under the agreement.
- SILC will provide payments based on the completion and acceptance of specific deliverables as identified in the Deliverables Cost Sheet (Attachment C).

I. Travel

Travel to sites in the Sacramento area may occur up to six times during the project duration. Travel costs must be included in the bid and will not be paid separately.

J. Deliverable-Based Agreement

This Agreement is deliverable-based. The hours projected for each identified deliverable in Attachment C will be used to assess the reasonableness of the contractor's offer. The contractor may not invoice the State for any costs exceeding the maximum amount identified to complete a deliverable.

K. Amendments

At the State's sole discretion, the contract may be extended for time or time and money and may be amended consistent with the terms and conditions of the original contract. The basis for any amendment must be identified and will be rated in the contractor's original offer.

Any contract resulting from this RFP may be amended to change the quantity, contract term, total contract dollar amount, and the Statement of Work by mutual agreement of the SILC

ATTACHMENT A – SCOPE OF WORK

ADRC Project Manager and contractor. Amendments to the contract will be issued by the SILC Purchasing Services Unit. All such amendments shall be in writing and are not final until all required approvals have been obtained.

L. Problem Escalation

The parties acknowledge and agree that the contractor may wish to escalate issues pertaining to the administration of this agreement by SILC. Such issues may include, but are not necessarily limited to, invoice processing and SILC timeliness in meeting its other contractual obligations.

Problems or issues shall normally be reported in regular status reports. However, there may be instances where the severity of the problem justifies escalated reporting. The contractor will advise the SILC ADRC Project Manager of any intended escalation. If the contractor is not satisfied that the State is exercising its best efforts to resolve any problem or issue in an appropriate period of time, the contractor must escalate the problem or issue to the SILC Executive Director.

M. Ownership of Products

SILC will retain exclusive ownership of all documents, procedures, etc. that the contractor develops.

N. Confidentiality

The contractor will sign all confidentiality, privacy, security and conflict of interest agreements as required by SILC to successfully provide the services described in this contract.

O. Exclusion for Conflict Of Interest

No consultant shall be paid for developing recommendations or reports on the ADRC Expansion or Strategic Plan, if that consultant is to be a source of such acquisition or would otherwise directly and/or materially benefit from the State adoption of such recommendations or the course of action recommended in the Strategic Plan.

P. Disclosure of Financial Interests

Proposals in response to State procurements for strategic planning must disclose any financial interests (i.e., service contracts, etc.) that may foreseeably allow the individual or organization submitting the proposal to materially benefit from the State's adoption of a course of action recommended in the strategic plan or of the acquisition recommendations.

ATTACHMENT B

CONSULTANT QUALIFICATIONS AND CLIENT REFERENCES

Consultant Qualifications and Client References

Complete this attachment (or a table or spreadsheet similar to it) to describe consultant qualifications with corresponding client references. SILC may, at its discretion, contact the listed clients to confirm the information provided by the vendor and determine client satisfaction with the outcome of the project. Qualified bidders must have experience in all areas listed below. Failure to complete this attachment may be cause for rejection of the offer.

Qualifications	Experience		
	Number of Years	Name of project(s), bidder's role and the relevant experience on the project(s). List dates of each engagement.	Client reference information ¹ : name, e-mail address, phone number.
Minimum five years experience in strategic planning consulting, including at least one year providing those services to California state agencies and departments.			
Minimum five years of experience conducting research on best practices in the health care, social services and/or or long-term services and supports.			
Minimum two years of experience conducting cost-benefit analyses.			
Familiarity with independent living principles and values.			

¹ List at least three references in this column. Three references are not required for each row; instead a minimum of three references is required in total for bidder.

ATTACHMENT C – DELIVERABLES COST SHEET AND BUDGET

Please list each deliverable in the table below and include in your bid (you are welcome to create a similar table in Word or Excel). The hours projected for each identified deliverable will be used to assess the reasonableness of the vendor's offer. The vendor may not invoice the State for any costs exceeding the maximum amount identified to complete a deliverable.

For each deliverable, identify the associated hours and costs for completing that deliverable. Provide the information for each deliverable in a table or spreadsheet similar to the format shown here:

	Deliverables	Due date	Hourly rate	Est. hours	Cost
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
	Travel Costs	Type	Cost	Total Trips	Cost
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
	TOTAL BUDGET				

ATTACHMENT D – COMPLETENESS REVIEW**Completeness Review**

The following checklist will be used to assess the completeness of the proposal. An incomplete proposal may result in it being disqualified. Please use this as a checklist tool for compiling your proposal.

Contractor: _____

YES	NO	PROPOSAL REQUIREMENTS & INFORMATION
		Met deadline: April 15, 2011 12pm PST
		One original (marked "original") submitted to Liz Pazdral, SILC Executive Director, under sealed cover, plainly marked with project title, "SILC ADRC STRATEGIC PLANNING CONSULTANTS", firm's name and address, "DO NOT OPEN, DUE APRIL 15, 2011 12PM PST." Original has original signatures by authorized person.
		Electronic copy submitted to Galen Ellis, ADRC Project Manager
		Used 12 pt. font
		Used 1" margins for narrative
		Saved as Microsoft Word 97-2003 or Rich Text Format
		Single spaced
		Sequential pagination, including attachments and exhibits
		Proposal is free of grammatical and spelling errors
--	--	Includes the following:
		Response Cover Sheet
		Consultant Qualifications and Client Reference Form
		Resume
		Description of Tasks to be Performed
		Methods and Tools
		Deliverable Costs Sheet
		Work Samples
--	--	Additional Items:
		Small Business Certification number
		This is the only proposal from an individual, firm, partnership, corporation or association under the same or different names

ATTACHMENT E – EVALUATION SHEET

Proposers: The form below will be used by a review team to evaluate your proposal. It is included here as a reference for how your proposal will be rated.

RFP 2011 – SILC ADRC STRATEGIC PLANNING CONSULTANT EVALUATION SHEET

Provide clear and concise documentation for points given or not given. All high or low scores should be substantiated in the comments section.

NAME OF PROPOSER: _____ **NAME OF EVALUATOR:** _____

RATING SCORING CRITERIA	MAXIMUM POINTS	SCORE
1. Tasks to be Performed Does the proposer's narrative reflect (a) an understanding of the scope of work; (b) an understanding of SILC's goals and objectives; and (c) major activities that must be performed to complete the work? Has the proposer described methods, tools and standards that will be used to (a) gain input from key stakeholders; (b) report on fiscal impacts to the State; and (c) produce a written strategic plan? Has the proposer included a high level Project Plan? Comments:	50	
2. Capabilities <i>Organization, Management, and Qualifications:</i> Has the proposer: (a) demonstrated that they are qualified and possess the experience and skills to design, implement, and produce deliverables; (b) clearly defined their roles and responsibilities; and (c) included references and prior work experience? Has the proposer met minimum mandatory qualifications? Comments:	30	
3. Deliverables Cost Sheet and Budget Has the proposer proposed: (a) a reasonable and detailed description of costs by deliverable; (b) expenditures that are reasonable in relation to the project's goals and objectives; (c) a budget that follows the requirements stated in the Scope of Work? Comments:	20	
TOTAL SCORE	100	

Question and Answers for Bid #1103-023 - Strategic Planning for ADRC Implementation in California

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.

Question Deadline: Apr 22, 2011 12:00:00 PM PDT