

# Best Practices For Responding to County-Issued Request for Proposals

Presented by



and



COMMUNITY BASED INITIATIVE (CBI) MEETING  
EVENT #5  
SEPTEMBER 29, 2021

# OBJECTIVES

- Review Request for Proposal (RFP) processes and components from the County of Santa Clara Behavioral Health Services Department (BHSD) and Social Services Agency (SSA) to help potential proposers better understand available RFP best practices and resources.
- Increase understanding of how to develop proposals that directly address the requirements to be evaluated in the RFP.
- Increase understanding of how clear and detailed proposals help Departments select the best vendors that address each target population's needs.

# AGENDA

1. Accessing RFPs & Periscope Support
2. Understanding RFP Components & Resources for Developing Proposals
3. Addressing Specific Evaluation Criteria in Proposals
4. Addressing the Budget Criteria in Proposals
5. Summary Overview
6. Questions & Answers + Resources

## II. ACCESSING RFPS & PERISCOPE SUPPORT

### Q: WHAT IS A REQUEST FOR PROPOSAL (RFP)?

A vendor selection process that allows individuals/agencies to submit proposals for services sought by the County Department. Proposals are evaluated based on RFP criteria and selected vendors are awarded contracts for services.

### Q: HOW DO I KNOW IF THE COUNTY IS RELEASING A RFP I MAY BE INTERESTED IN?

- 1) Direct e-mail from the Department if current vendor;
- 2) Board of Supervisors Master Acquisition List (MAL);
- 3) Periscope website search and alert (based on notifications via email based on company profile)

### Q: WHAT IS PERISCOPE?

A free website ([Procurement software for buyers and suppliers \(periscopeholdings.com\)](https://procurement.sccgov.org/home)) that posts governmental contract bid opportunities, including County RFPs. It is free to sign up and includes a hotline for technical support if you are experiencing search/sign-up/access issues. Periscope Support (800) 990-9339. You may find additional vendor support by visiting the Procurement's website at : <https://procurement.sccgov.org/home> (under the "Vendor Resource Center" section). 

### III. RFP COMPONENTS & RESOURCES FOR DEVELOPING PROPOSALS

Board Policy- County conducts open, fair, and full competitive solicitation processes.

#### SCOPE OF WORK (SOW)

**What is it?** The scope of services that the County Department is currently seeking.

**Why is it useful?** Reading the SOW helps you determine whether your agency is capable of providing the services that are needed. The SOW outlines not only the target population(s) and languages needed, but the *type* of services, staffing requirements, appropriate practices/levels/methodologies, licenses, and other requirements necessary. Your proposal should address components of the SOW to demonstrate your understanding, capacity, and methodologies in providing the scope of services.

#### PRE-PROPOSAL CONFERENCE

**What is it?** A conference where the Department's Finance, Programs, and Contracts staff outline every component of the RFP. Attendance is optional for most RFPs, but *highly recommended.*

**Why is it useful?** This is your opportunity to ask questions, points of clarification, and follow-up questions in real time. Not sure what the Department is asking? This is the time to ask. All Q&A from this conference are posted on Periscope, but asking questions allows for real-time clarification and explanations to ensure the Department understands your question.

### III. RFP COMPONENTS & RESOURCES FOR DEVELOPING PROPOSALS (CONTINUED)

- **PERISCOPE QUESTIONS & ANSWERS**

**What is it?** A function on Periscope that allows you to submit questions regarding the RFP and read answers provided by the Department (responses are posted depending on the volume and complexity of the questions received).

[View Questions & Answers](#) ← **CLICK HERE!**

Questions: **4**

Q&A Deadline: October 14, 2021 5:00:00 PM PDT

← **NOTE THE DEADLINE**

**Why is it useful?** Reading questions other potential proposers have asked can help you gain clarity on what is expected in a strong proposal. Asking questions via Periscope is also a good resource if you could not attend the pre-proposal conference. All questions & answers submitted regarding a RFP are posted on Periscope.

# IV. HOW TO ADDRESS SPECIFIC EVALUATION CRITERIA IN PROPOSALS

## HUMAN SERVICES RFP: FAITH-BASED REENTRY CENTER FOR LATINO POPULATION

*(Partial Example Only)*

### 1. Organizational Experience (Maximum 15 Points)

a. Proposer described the current **organizational structure**. Proposer described how this program is aligned with **the mission of the organization** that focuses on Latino culture, and how **services and supports will be incorporated into this program** geared towards Latinos. Proposer included its **organization's staffing plan**. 5 points

b. **Proposer described its organizational plan** to provide culturally competent services that recognizes Latino cultural and ethnic identity in achieving wellness and recovery. Proposer explained its **understanding of the target population** and **specific strategies** focused on Latino culture that have been implemented to attract, retain, and work effectively with reentry individuals and their families. 5 points

c. Proposer described how its organization **collaborates** with other faith-based organizations, churches, and community based organizations in which Latinos are served. Proposer explained **how this collaboration has improved community relations**, and how the target population **benefited** from the partnership. 5 points

## IV. HOW TO ADDRESS SPECIFIC EVALUATION CRITERIA IN PROPOSALS (CONTINUED)

### RESPONDING TO ORGANIZATIONAL EXPERIENCE (DO'S & DON'TS)

DO	DON'T
<b>DO</b> mention your years of experience and mission in relation to the target population.	<b><u>DON'T</u></b> focus solely on years of experience without linking to the Department's requirements/needs and to strategies & solutions.
<b>DO</b> <u>answer the call of the question</u> (what is the question really asking for?) and provide examples and specifics to support your answer.	<b><u>DON'T</u></b> copy and paste phrases from prior answers and re-word. Redundant answers do not earn extra points.
<b>DO</b> list examples of each type of organization your agency collaborates with <u>and in what capacity</u> .	<b><u>DON'T</u></b> forget to tie collaborations back to how they improved community relations and how the clients benefited (the call of the question).
<b>DO</b> give <u>concrete examples and list specific strategies</u> and <u>how they are effective</u> .	<b><u>DON'T</u></b> describe only the obstacles the target population faces without any solutions.
<b>DO</b> provide a detailed organizational staffing plans and <u>describe how it's geared towards supporting the target population</u> .	<b><u>DON'T</u></b> forget to <u>provide statistics</u> that can correlate with existing client success rates.

# IV. HOW TO ADDRESS SPECIFIC EVALUATION CRITERIA IN PROPOSALS (CONTINUED)

## HUMAN SERVICES RFP: FAITH-BASED REENTRY CENTER FOR LATINO POPULATION

*(Partial Example Only)*

### 2. Proposed Services Description (Maximum 30 points)

<p>a. Proposer provided a <b>list of services</b> its organization currently offers to Latino reentry individuals and <b>how services are responsive to their needs</b>. Proposer described <b>how</b> Latino reentry individuals will be linked to faith, spiritual, and social community supports.</p>	<p>5 points</p>
<p>b. Proposer described its <b>plan to generate appropriate referrals</b> for Latino individuals into the program, its service <b>promotion and outreach plan</b>, including <b>timeline</b>. Proposer described the <b>referral process</b> that will be utilized, and <b>how individuals will be matched</b> with the most appropriate services.</p>	<p>10 points</p>
<p>c. Proposer described its organization’s <b>experience in creating and implementing</b> a volunteer and peer support program that is <b>culturally, linguistically and ethnically competent</b> and dedicated towards Latino adults. Proposer provided a <b>description of the peer support model</b> utilized by its organization. Proposer included the <b>number of volunteers and the services</b> that it will provide; the <b>process of pairing</b> mentors with clients; <b>the number of individuals enrolled</b> in the mentor program; and a <b>description of the outcomes</b> achieved. Proposer described the <b>volunteer screening process</b> and <b>provided the training outline</b> that staff and volunteers receive prior to working with the target population.</p>	<p>15 points</p>

## IV. HOW TO ADDRESS SPECIFIC EVALUATION CRITERIA IN PROPOSALS (CONTINUED)

### Responding to Proposed Services Description (DO's & DON'Ts)

DO	DON'T
<b>DO</b> recognize when criteria asks for numbers and timelines.	<b>DON'T</b> forget to provide <u>statistics, dates, and realistic projections</u> grounded in facts.
<b>DO</b> recognize when criteria asks for <u>descriptions</u> of processes and outcomes.	<b>DON'T</b> <u>skimp on details</u> when describing steps of a process and how outcomes are met.
<b>DO</b> provide specifics regarding the <u>linguistic/language capacity</u> of your staff.	<b>DON'T</b> forget to <u>address gaps in the SOW's required languages</u> that your agency is not currently able to provide.
<b>DO</b> describe in detail both the services <i>and how</i> they will be culturally and ethnically competent.	<b>DON'T</b> address only cultural and ethnic challenges, without <u>describing solutions</u> through your services as related to the SOW.
<b>DO</b> recognize when criteria asks about <u>models, screenings, evidence based practices, levels of service, and trainings</u> .	<b>DON'T</b> neglect to <u>name specific evidence-based or best practices, cultural practices, outreach, trainings, models, and screenings to be used, their frequency, and other relevant details</u> .

## V. HOW TO ADDRESS THE BUDGET REQUIREMENTS

### Responding to Budget Requirements (DO's & DON'Ts)

DO	DON'T
<b>DO</b> understand the budget and narrative requirements for the RFP	<b>DON'T</b> forget to provide <u>responses to all of the required evaluation criteria</u>
<b>DO</b> recognize that each Department has its own budget evaluation criteria that is dependent on the services required	<b>DON'T</b> skip the <u>pre-proposal conference</u> if you need budget or budget proposal submission clarifications that may be beneficial to attend

## VI. HOW TO SUBMIT YOUR PROPOSAL

- RFPs are issued electronically through Periscope: [www.periscopeholdings.com/s2g](http://www.periscopeholdings.com/s2g)
- Reminder to be mindful of the deadlines listed on the RFPs
- County Procurement Department has a **Vendor Resource Center** on the Procurement website: <https://procurement.sccgov.org/home>
  - Click on **Solicitation Training Resources**
  - The following Periscope training resources are available to the public:

 Periscope Downloading Issued Solicitation Packets	 <b>Video: Request for Proposal (RFP):</b> This webinar provides an overview of the County of Santa Clara's Request for Proposal (RFP) process. Included is an walkthrough of a RFP to learn early on in the procurement process how to assess your organization's interest and capacity to participate. Also included are tips to confidently prepare and submit proposals. <b>Timestamps:</b> Determining Your Interest and Capacity - 18:29 min Requirements - 30:55 min Technical Tips - 48:03 min Increasing your Competitiveness: 52:13 min
 Periscope eRFP Submission Training Slides	
 <b>Video: Periscope eRFP Submission Training</b> This tutorial will guide you through the 3-step submission process for submitting your proposal in the County of Santa Clara's solicitation management system, Periscope.	

**YOUTUBE VIDEOS**

**PowerPoint**

# SUMMARY

- Utilize Periscope and County resources to access RFPs and gain more clarity on requirements to craft a stronger proposal.
- Ask questions at Pre-Proposal Conferences and on Periscope if you are unclear about the process and criteria.
- Address the RFP criteria clearly and directly in your proposal by answering the call of each question and providing specific examples and details to support your answers.
- Note: LATE PROPOSALS WILL **NOT** BE ACCEPTED.

# QUESTIONS & ANSWERS

- **RESOURCES**

- **County Procurement Department**

- Website: <https://procurement.sccgov.org/home>

- **CBI PowerPoint Presentation**

- **Periscope**

- Website: [www.periscopeholdings.com/s2g](http://www.periscopeholdings.com/s2g)

- Technical helpline: (800) 990-9339

- Vendor Support Portal:

- <https://vendors.bidsync.com/hc/en-us/requests/new>

## Questions & Resources